

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Chemical sector



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Country codes

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

Introduction

The purpose of this study is to assess the representativeness of the European social partners in the chemical sector based on the membership of the affiliated national organisations. Based on this assessment of their representativeness, the European Commission can decide which organisations should be retained on or added to the list of organisations entitled to consultation under Article 154 of the Treaty on the Functioning of the European Union (TFEU). In the case of European social partner agreements, required to be implemented by means of a Council directive, as set out in Article 155 TFEU, the regulative powers granted to European social partners are based on their representativeness.

The chemical sector includes the production of basic chemicals, specialty chemicals, pharmaceuticals, plastic and rubber. In the first chapter, the sectoral workforce and companies are presented, after which national trade unions and employer organisations are introduced. It concludes with the main findings on the representativeness of industriAll European Trade Union (industriAll Europe), representing workers, and of the European Chemical Employers Group (ECEG), representing employers in the sector. In the second chapter, the history of the European sectoral social dialogue committee (ESSDC) in the chemical industry is presented, including the establishment of ECEG in 2002, which was crucial for the start of the ESSDC in 2004. The scope of the ESSDC initially covered only the production of basic chemicals and specialty chemicals, but was extended in 2015 to cover also the production of pharmaceuticals, rubber and plastics. The legitimacy of the ESSDC depends upon the representativeness of the European social partner organisations involved. While participation in the ESSDC is based on the autonomy of the European social partners, this representativeness study provides guidance for future decision-making on this. Moreover, for future capacity-building initiatives, the national sectoral organisations listed that are not represented on the committee may offer valuable guidance.

The representativeness of industriAll Europe is assessed in Chapter 3, based on the three criteria specified in European Commission Decision 98/500/EC of 1998. ECEG's representativeness is analysed according to the same three criteria in Chapter 4. A list of national sectoral trade unions not affiliated to industriAll Europe, and of employer organisations not represented by ECEG, is provided in Chapter 5. Other European organisations with some representativeness in the sector can be found in Chapter 6. Chapter 7 compares the findings of this study with the previous chemical representativeness study from 2014. Chapter 8 assesses the negotiation capacity of the European social partners, and Chapter 9 the effective participation in the European social dialogue. Conclusions can be found in Chapter 10.

Reference will be made to the tables in the annex where details can be checked, on which this report is based. The entire study is based on information gathered across the 27 EU Member States by the Network of European Correspondents, between May 2021 and May 2022, using a detailed questionnaire. This was internally revised and reworked by Eurofound. In June 2022, the information was shared with the European social partner organisations, ECEG and industriAll Europe, for feedback. The data correspond to the situation in 2022, updated in 2024 to reflect the latest developments. A new format to present the findings of this study is piloted with this report. European social partners were consulted on the draft report in August 2024. The final draft of this study was formally evaluated by Eurofound's Advisory Committee on Industrial Relations, and by all

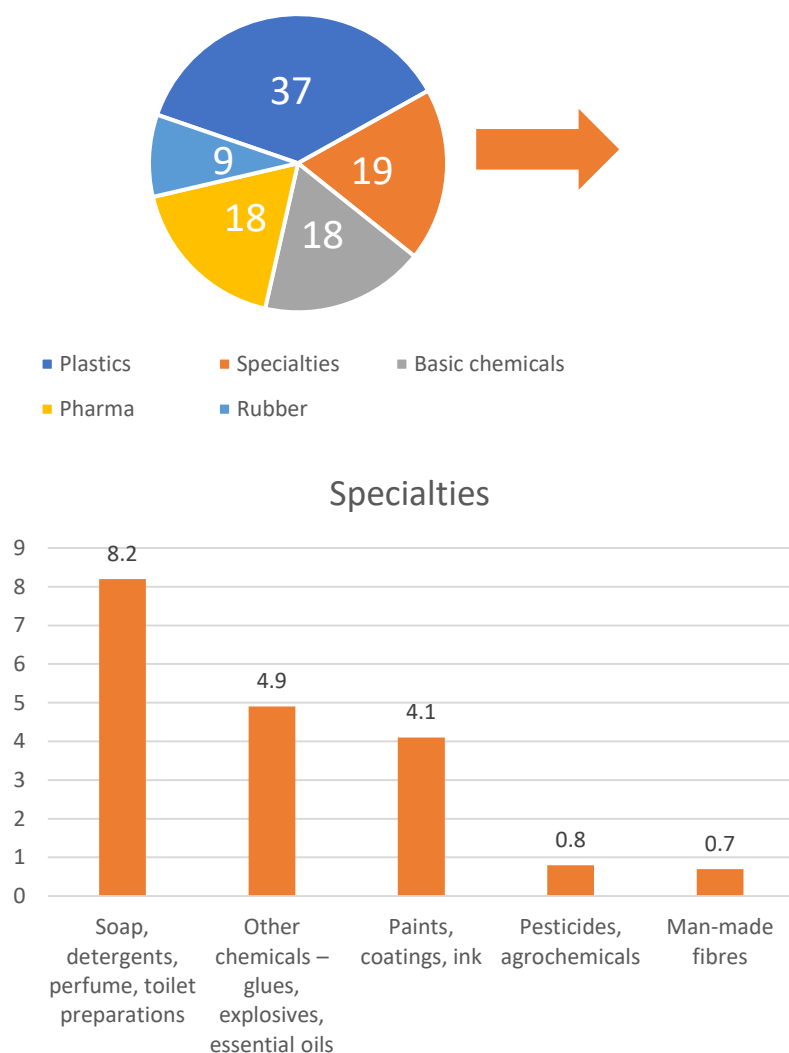
European associations mentioned in this report. This tripartite approach, including several feedback and commenting opportunities, ensures the accuracy of the study and the acceptance of the findings by all stakeholders involved.

1. Main findings

1.1. Scope of the chemical sector (NACE codes defining the sector)

The scope of the sector is defined by codes 20, 21 and 22 in the Statistical Classification of Economic Activities in the European Community (NACE). NACE 20 stands for the manufacture of basic chemicals and specialty chemicals production, NACE 21 for pharmaceuticals, and NACE 22 for plastics and rubber production. Of the entire European chemical sector workforce, 36.5% is employed in NACE 20 (including 18% in the production of basic chemicals and another 18.5% in specialties production) (Figure 1). Pharmaceuticals (NACE 21) employs 18% of the European sectoral workforce, while the production of rubber employs 9% (NACE 22.1) and plastics employs 37% (NACE 22.2). Details on the NACE codes can be found in Annex 1.

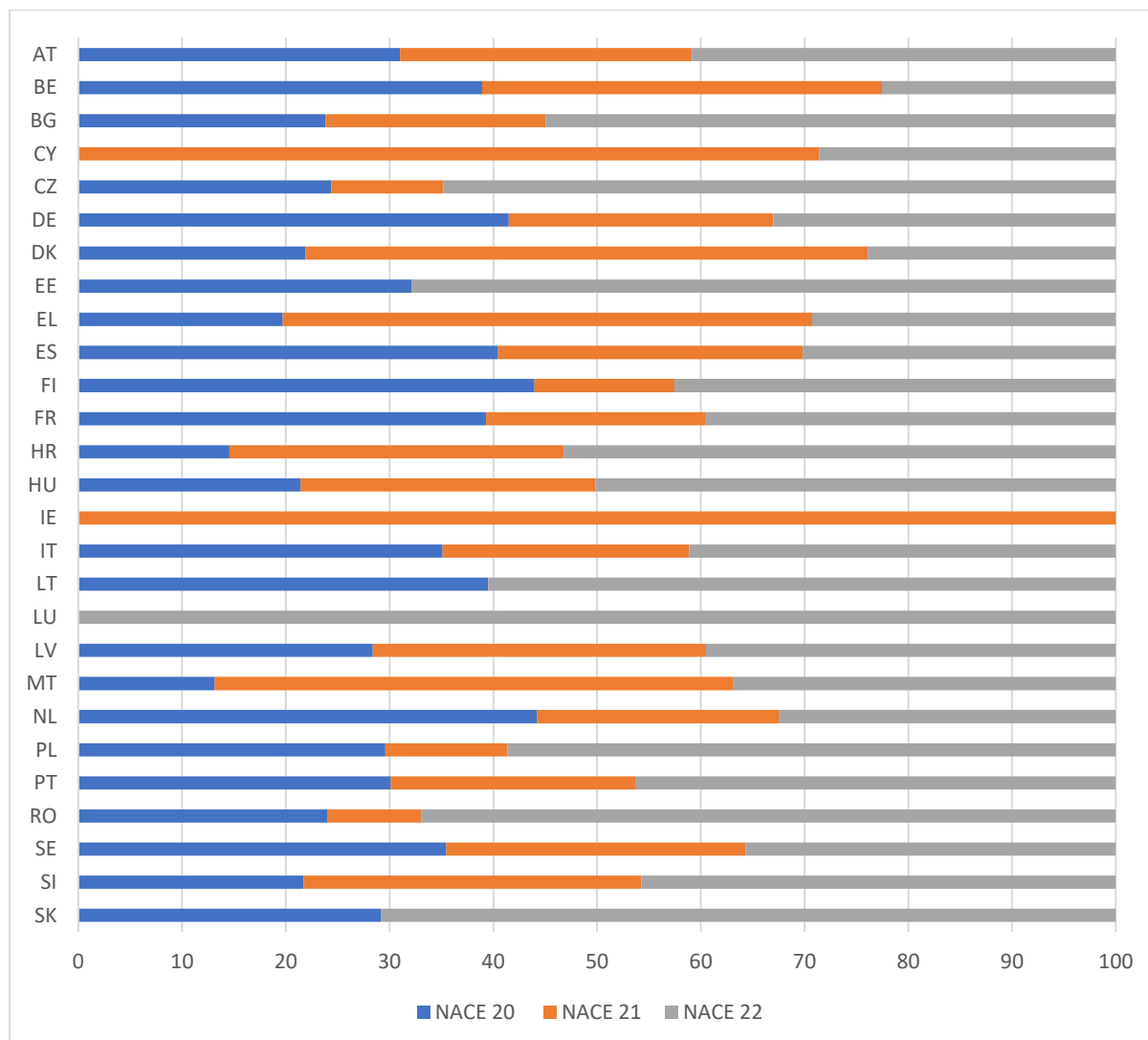
Figure 1: Proportions of the sectoral workforce employed in the different parts of the sector (%)



The proportions of the workforce in different subsectors vary across the different EU Member States (Figure 2). Examples of countries where basic chemicals and specialty chemicals (NACE 20) cover a larger proportion of the sectoral workforce than the EU average are Belgium, Finland, France,

Germany, Lithuania, the Netherlands and Spain. Employment in pharmaceuticals (NACE 21) has a higher relative importance in Denmark, Greece, Ireland and Malta. For plastics and rubber (NACE 22), employment is most important (more than 60% of sectoral employment) in Czechia, Estonia, Lithuania, Luxembourg, Romania and Slovakia.

Figure 2: Proportions of the sectoral workforce in NACE codes 20, 21 and 22, by Member State



Note: Data not available for NACE 20 in Cyprus, Ireland and Luxembourg; for NACE 21 in Estonia, Lithuania, Luxembourg and Slovakia; for NACE 22 in Ireland.

Source: Authors, based on Eurostat data

1.2. The chemical sector workforce in the 27 EU Member States

The chemical sector in the EU employs a little over 3.5 million workers. The countries with the highest sectoral workforce, in absolute numbers, are the five largest EU Member States (Germany, France, Italy, Poland and Spain, in order of sectoral workforce) followed by the Netherlands, Belgium, Czechia and Hungary, each of which has a sectoral workforce of over 100,000 people, rounding up with Romania, with a sectoral workforce just below 100,000 (Figure 3). At the other end of the spectrum, Malta and Cyprus have fewer than 5,000 employees in the chemical sector. (Details about the sector specificities can be found in Table A7 in Annex 2.)

Figure 3: Member States with largest sectoral workforce in absolute numbers (on the left) and as a proportion of the entire national workforce (on the right)

10 Member States with most chemical sector employees	Employees in the chemical sector	Share of the total EU27 sectoral workforce (%)	%	Proportion of national workforce	Member States*	Number of Member States
EU27	3,564,700	100		>3%	SI (3.7%)	1
DE	887,200	24.9	68.8	2.5–3%	CZ, HU, IE	3
IT ¹	425,300	11.9		2.0–2.4%	DE, PL, BE, SK, DK	5
FR	408,300	11.5		1.5–1.9%	IT, ² FR, ES, AT, BG, HR	6
PL	370,500	10.4		1.0–1.4%	NL, RO, PT, EL, SE, FI, LT, LV, EE, CY, MT	11
ES	303,700	8.5		<1%	LU (0.7%)	1
CZ	143,000	4.1		16.4		
HU	121,000	3.5				
BE	109,700	3.2				
NL	100,600	2.9				
RO	96,100	2.8				

Note: Member States marked in green are the 10 with the largest sectoral workforce

Source: Eurostat LFS, 2021 data on the number of employees in the chemical sector (NACE 20, 21 and 22)

The chemical sector workforce corresponds to 1.8% of the total EU workforce. In proportion to the total national workforce, the chemical sector is most important for Slovenia, where 3.7% of the national workforce is employed in the chemical sector. For Czechia, Hungary and Ireland, the proportion is between 2.5% and 2.9%, while for Belgium, Denmark, Germany, Poland and Slovakia it is between 2.0% and 2.4% of the entire national workforce.

The vast majority of employed persons in the chemical sector are employees in permanent, full-time employment. Portugal records the highest proportion – 99.3% in NACE 21 – while the lowest proportion is in Greece, 83% in NACE 23. Non-standard forms of employment are generally not common in the chemical sector, representing less than 10% in the countries where relevant data

¹ According to Federchimica, official data (Istat 2022) report that the total number of companies active in Italy under NACE 20, 21 and 22 is 12,801 (0.3% of total in Italy), with 362,317 workers employed in total (2% of the national workforce). LFS data are used for the number of employees in 2021 for all tables (and in Figure 3), and SBS data for the number of companies in 2020, which were the latest data available at the time this report was drafted.

² According to Federchimica, the chemical sector workforce corresponds to 2% of the total national workforce.

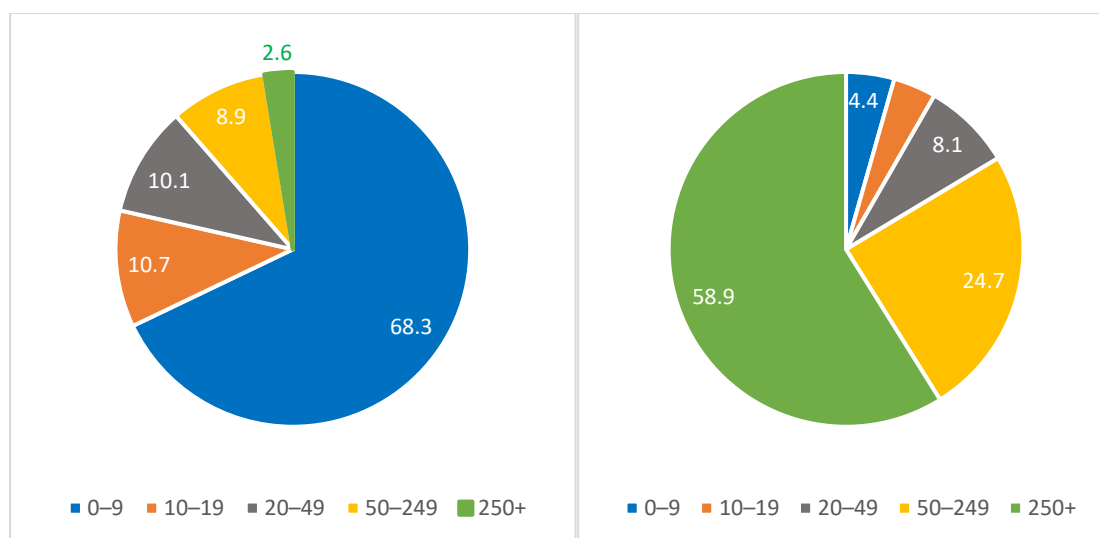
were found. Self-employment is either non-existent or uncommon. In the countries where self-employment is present, it represents less than 5% of employment in the chemical sector.

The overall level of employment in the sector for all 27 Member States together was rather stable comparing 2014 and 2021. France saw the highest decline, of 120,700 fewer persons employed in the chemical sector in 2021 than in 2015. Spain and Germany also saw sectoral employment shrink by 88,900 and 76,600 persons respectively. Conversely, Poland saw by far the highest increase in sectoral employment in the EU, with 91,100 more persons working in the country’s chemical sector in 2021 than in 2015. This was followed by Czechia, with 30,000 more.

1.3. Chemical sector companies – the employers

There are nearly 89,000 companies operating in the EU27 chemical sector, accounting for 1.4% of the total number of enterprises in the EU27. The left of Figure 4 indicates in blue that 68.3% of all chemical sector companies employ fewer than 10 employees, while the 2.6% that are large companies, with 250 employees or more, are shown in green. On the right of the figure, the proportion shows the sectoral workforce employed by the companies in the different size groups. Microenterprises employ only 4.4% of the sectoral workforce (blue), while 58.9% of the sectoral workforce is employed in large companies, with 250 employees or more (green). Companies with 10–19 employees are presented in orange, those with 20–49 employees in grey and those with 50–249 employees in yellow.

Figure 4: Proportion of companies by size class (left) and proportion of the sectoral workforce in the different company size classes (right) (%)



Plastics (NACE 22.2) represents the largest part of the sector, with 54% of the companies in the sector and 37% of the sectoral workforce (Table 1). Basic chemicals production and specialty chemicals production (NACE 20) account for about a third of the companies in the sector and about a third of the sectoral employment. Rubber (NACE 22.1) is produced by 9% of the companies and 9% of the sectoral workforce. Pharmaceuticals (NACE 21) are produced by 4.5% of the companies in the sector and 18.5% of the sectoral workforce. On average the proportion of larger companies is highest in pharmaceuticals, where also the average workforce size per company is the highest.

Table 1: Proportion of companies (left) and sectoral workforce (right) in each company size class, by NACE code

0-9	10-19	20-49	50-249	250+	Company size group	0-9	10-19	20-49	50-249	250+
72.4%	9.4%	9.0%	8.6%	2.9%	NACE 20 Basic chemicals & specialties 33% / 36%	4.1%	3.3%	6.7%	22.3%	63.6%
57.0%	8.4%	8.4%	14.7%	11.0%	NACE 21 Pharma 4.5% / 18.5%	0.8%	0.7%	1.8%	10.8%	85.9%
73.2%	10.4%	7.7%	6.1%	2.5%	NACE 22.1 Rubber 9% / 9%	4.6%	3.7%	6.1%	16.0%	69.5%
65.9%	11.8%	11.4%	9.2%	1.8%	NACE 22.2 Plastics 54% / 37%	6.4%	6.1%	13.1%	35.8%	38.5%
67.8%	10.6%	0.0%	10.0%	8.9%	Entire Chemical sector 100% / 100%	4.4%	3.9%	8.1%	24.7%	58.9%

Company type and size vary greatly depending on the country and subsector. Pharmaceuticals require a high level of investment in research and development and are characterised by larger companies. Specialty chemicals, rubber and plastics production is done by a larger number of smaller companies. The great variety of company characteristics has implications for representing the interests of employers in the sector, since large companies have human resources departments, which is not always the case in small and medium-sized enterprises (SMEs) or microenterprises.

1.4. National sectoral trade unions and employer organisations and their affiliations at EU level

This study has identified 85 different sectoral trade unions and 63 employer organisations. Trade unions organising employees in the chemical sector employees can be found in all 27 Member States. All details on these trade unions can be found in Annex 3. National sectoral employer organisations exist in 26 Member States. In Luxembourg there is no employer organisation in the chemical sector. Figure 5 shows the numbers of trade unions on the left, with the green cells indicating the numbers of trade unions affiliated to industriAll Europe. On the right are the number of employer organisations in each Member State, with the blue cells indicating the number of employer organisations affiliated to ECEG.

Figure 5: Number of national sectoral trade unions and employer organisations

								TUs	MS	EOs									
								2	AT	2									
								5	BE	1									
								2	BG	3									
								3	CY	1									
								2	CZ	1									
								3	DE	2									
								2	DK	1									
								1	EE	3									
								3	EL	3									
								5	ES	1									
								5	FI	1									
								9	FR	11									
								3	HR	1									
								2	HU	2									
								2	IE	1									
								3	IT	2									
								2	LT	4									
								2	LU	0									
								1	LV	1									
								1	MT	1									
								3	NL	3									
								5	PL	2									
								7	PT	10									
								2	RO	2									
								5	SE	1									
								3	SI	2									
								2	SK	1									
								58	85	EU	63								15

Notes: EO, employer organisation; MS, Member State; TU, trade union.

Source: Network of Eurofound Correspondents (see Annexes 3 and 4)

Marked in green in Figure 5 are the 58 trade unions affiliated to industriAll Europe in 25 Member States. In 12 Member States, all sectoral trade unions are affiliated: in Austria, Belgium, Bulgaria, Denmark, Finland, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta and Romania. The three Member States where industriAll Europe has no sectoral trade union affiliated are Cyprus, Estonia and Greece.

Chapter 5 lists all the national sectoral trade unions not affiliated to industriAll Europe. Chapter 6 considers whether there are any other European trade union organisations with some representativeness in the sector. This is the case for the European Federation of Managerial Staff in the Chemical and Allied Industries (FECCIA), which organises managerial staff in the chemical sector. By comparing it with the representativeness of industriAll Europe, which is analysed in detail in Chapter 3, it can be concluded that industriAll Europe is the most representative European trade union in the chemical sector.

Marked in blue in Figure 5 are the 15 national sectoral employer organisations affiliated to ECEG, from 15 Member States. Moreover, ECEG also has a member organisation in the United Kingdom (UK) (the Chemical Industry Association, CIA), which was not taken into account for the purpose of this study, as it covers the EU27 only. In seven EU Member States, the only national sectoral employer organisations are affiliated to ECEG. This is the case for Belgium, Croatia, Denmark, Finland, Slovakia, Spain and Sweden. The 11 Member States where there are employer organisations, but ECEG has no member organisation, are Cyprus, Czechia, Estonia, Ireland, Latvia,

Lithuania, Malta, the Netherlands, Portugal, Romania and Slovenia. In Luxembourg there is no chemical sector employer organisation.

Chapter 5 lists all the national sectoral trade employer organisations that are not affiliated to ECEG. Chapter 6 considers whether there are any other European employer organisations with some representativeness in the sector. Besides the European Chemical Industry Council (CEFIC), which covers the entire sector as a business association,³ there are many European organisations for specific subsectors of the chemical industry, of which some occasionally cooperate with trade unions or in sector-related projects. ETRMA, for example, covers the rubber producers, EuPC and Plastics Europe the plastic converters and producers, and EFPIA the pharmaceutical businesses. SMEUnited is involved in a EU-funded project of the European chemical sector social partners, namely the Chemskills project funded by the Erasmus+ budget line. CEFIC has co-signed several joint opinions and policy statements agreed by ECEG and industriAll Europe. By comparing them with the representativeness of ECEG, which is analysed in detail in Chapter 4, it can be concluded that ECEG is the most representative European employer organisation in the chemical sector.

Details of the national sectoral trade unions can be found in Annex 3, and those of the national sectoral employer organisations in Annex 4.

³ CEFIC has, however, co-signed some joint opinions; see Table A34 in Annex 6.

2. The European sectoral social dialogue for the chemical sector

The chemical European sector social dialogue committee (ESSDC) was formally set up on 14 December 2004, with two representative social partners, the **European Mine, Chemical and Energy Workers' Union (EMCEF)** and the **European Chemical Employers Group (ECEG)**. EMCEF was established in 1996, the result of a merger of the European Mine Workers Federation and the European Federation of Chemical and General Workers Unions. In 2012, EMCEF merged with the European Metalworkers Federation and the European Trade Union Federation for Textiles, Clothing and Leather, into **industriAll European Trade Union (industriAll Europe)**. The creation of ECEG by the employers' representatives in 2002 was crucial for the establishment of the ESSDC in 2004.

Informal cooperation between EMCEF and CEFIC already took place on an ad hoc basis before 2002. In January 2002, national employers' associations established ECEG, which had a memorandum of understanding signed with CEFIC. Later in 2002, a first European-level conference was held in Paris, organised by ECEG and EMCEF. Follow-up annual conferences between ECEG and EMCEF were held in 2003 in Madrid and in 2004 in Helsinki. At the 2003 Madrid conference, a presentation from the Directorate-General for Employment, Social Affairs and Inclusion helped ECEG and EMCEF reach a common understanding of the concept of European sectoral social dialogue. Already in 2003 two joint opinions were agreed on, one on the registration, evaluation, authorisation and restriction of chemicals and one on responsible care. In September 2004, a joint opinion on vocational training and lifelong learning was signed, together with a joint declaration on the establishment of an ESSDC for the chemical industry. The formal establishment of the ESSDC took place in Brussels on 14 December 2004.

The previous Eurofound representativeness study for the chemical sector was published in 2014. In 2015 the scope of the ESSDC was extended following an exchange of letters between the EU social partners and the European Commission, referring to the 2014 Eurofound representativeness study.

A joint letter from industriAll Europe and ECEG from 31 March 2015 indicates that the December 2002 joint declaration requesting the setting up of the initial chemical sector ESSDC did not specify the NACE codes it would cover, but referred to the 'chemical industry', which can be understood as NACE 20, the manufacturing of basic chemicals and specialty chemicals. Referring to the 2014 Eurofound representativeness study for the chemical sector, industriAll Europe and ECEG indicated that they also cover NACE 21 and 22 via their affiliates, thus requesting that the scope of the ESSDC be extended. In its response on 7 May 2015, the European Commission endorsed the request, referring to the evidence provided in the 2014 Eurofound representativeness study, and to the Commission's striving towards ESSDCs that are as inclusive as possible in their thematic coverage of the given sector.

From **2014 to 2020**, the ESSDC in the chemical industry focused on issues around competitiveness; research, development and innovation, and management of change; occupational health and safety; employment and demographic change, including discussions on the European Pillar of Social Rights; education, training and lifelong learning; and industrial and climate change policy.

The focus of the committee's work from **2020 to 2022** was impacted by the current changes in the chemical industry. The topics discussed included digitalisation and its impact on energy demand;

data protection and performance monitoring; gender equality and diversity; health and safety – especially physical risks, radio frequency identification chips and exoskeletons, but also several discussions related to plastics strategy, microplastics and carcinogenic substances, including pharmaceuticals and their impact on the environment; exchanges of good examples regarding skills development and lifelong learning; sector attractiveness; support of SMEs; and the Green Deal (work programme 2020–2022). The outbreak of the COVID-19 pandemic in 2020 shifted the focus on health and safety at the workplace.

In its **work programme for 2023–2025**, the committee focuses on six core areas: industrial policy, training and education, health and safety, labour shortages and migration, improvements to EU and national social dialogue, and the industry’s image in relation to climate change. First, the industry aims to address the impact of energy prices on its competitiveness; for example, the revision of the ECEG–industriAll Europe joint declaration on the financial crisis in 2009 was updated to reflect the energy crisis in February 2023. Second, the EESDC’s focuses are on competence development, reskilling and upskilling, particularly in the context of the green transition, and promotion of science, technology, engineering and maths education. Third, efforts are being made to prevent long-term occupational illnesses. Fourth, social partners stress a need to collect sector-specific data on migration and identify their role in supporting EU-level policies on migration. Furthermore, the committee aims to develop an action plan that will bridge the European and national social dialogues. Interestingly, the committee members also plan to collect examples of good practice from their national-level affiliates on how to improve the chemical industry’s image, facing the reality of climate change (work programme 2023–2025⁴).

A complete overview of all joint opinions and EU-funded projects and a general overview of the 20 years of the EESDC for the chemical sector can be found in Table A34 in Annex 6.

⁴ Information on the work programme is available at https://www.eceg.org/files/ugd/977a5c_971fdd6768614f9e9dfcff438676848d.pdf

3. IndustriAll Europe

The membership-based representativeness of industriAll Europe is summarised in the scoreboard (Figure 6). This illustrates on the left, in blue, that 58 of the 85 sector-related trade unions (68%), in 25 EU Member States, are affiliated to industriAll Europe.

The two Member States where industriAll Europe has no affiliated chemical sector trade union are Cyprus and Estonia. They are marked white in the scoreboard. Estonia employs 8,100 workers in the chemical sector, which is 0.2% of the EU sectoral workforce and 1.3% of the national Estonian workforce. Cyprus has 4,200 employees in the chemical sector, which is 0.1% of the EU sectoral workforce and 1% of the national Cypriot workforce.

Figure 6: Scoreboard of the representativeness of industriAll Europe in the chemical sector

68% of chemical sector trade unions affiliated to industriAll Europe	25 Member States with an affiliated chemical sector TU, shown in light blue			1,291,819 employees are members of the 58 sectoral trade unions affiliated to industriAll Europe	
	AT	ES	LV	= 93% of all 1,388,072 trade union members in the sector	= 36% of all 3,564,700 sectoral employees
	BE	FI	MT		
	BG	FR	NL	12 Member States in which all sectoral trade unions are affiliated	12 Member States
	CY	HR	PL		
	CZ	HU	PT		
	DE	IE	RO	23 Member States in which the largest sectoral trade union is directly affiliated	23 Member States directly (in SI indirectly)
	DK	IT	SE		
	EE	LT	SI	16 Member States in which the second largest sectoral trade union is affiliated	16 of 26 Member States
	EL	LU	SK		

Note: The blue part of the pie chart corresponds to the proportion of sectoral trade unions affiliated to industriAll Europe. The Member States marked in blue are those in which industriAll Europe has an affiliated sectoral trade union. The Member States left in white are the three where there is no trade union affiliated to industriAll Europe.

Sources: Tables 28 and 36

Of the 3,564,700 employees in the chemical sector in the EU27, there are about 1,388,072 affiliated to a sectoral trade union (39%). This is based on estimates from experts and information provided by 72 of the 85 sectoral trade unions. The trade unions affiliated to industriAll Europe report that they have 1,291,819 affiliated sectoral employees. This corresponds to 93% of all trade union members and 36% of all 3,564,700 sectoral employees.

In 12 Member States, all sectoral trade unions are affiliated to industriAll Europe (marked in green in Table 2). This is the case for Austria, Belgium, Bulgaria, Denmark, Finland, Hungary, Italy, Lithuania, Luxembourg, Latvia, Malta and Romania. In those 12 Member States there are 992,600 employees in the sector, which is 28% of the EU sectoral workforce. All trade unions together have 446,807 affiliated sectoral employees in those 12 countries, corresponding to a density of 44% of the sectoral workforce in those 12 countries.

There are two Member States where industriAll Europe has no affiliated trade union: Cyprus and Estonia. In those two Member States there are 12,300 employees in the sector, which corresponds to 0.3% of the EU sectoral workforce. Trade unions in these two Member States have a density rate of 20%.

In the remaining 13 Member States there are some trade unions affiliated, though not all. This is the case for Croatia, Czechia, France, Germany, Greece, Ireland, the Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain and Sweden. In these 12 Member States, 2,498,900 persons are employed: 70% of the EU sectoral workforce. The trade unions affiliated to industriAll Europe from those 12 Member States reported altogether 832,132 affiliated sectoral employees. This is 90% of all employees affiliated to a trade union in those countries, and 33% of the sectoral workforce in those countries.

In 23 Member States, the largest sectoral trade union is directly affiliated. In one more Member State, Slovenia, the largest trade union, ZSSS-KNG, is affiliated to industriAll Europe indirectly, through its umbrella organisation ZSSS. The directly affiliated industriAll Europe member in Slovenia, KSS Pergam, is the fourth largest trade union in terms of members in the sector. The three other Member States where the largest trade union is not affiliated are those in which industriAll Europe has no affiliated sectoral union. The second largest trade union is affiliated in 16 out of the 25 Member States where there is more than one sectoral trade union.

Table 2: Membership strength of the sectoral trade unions affiliated to industriAll Europe

MS	Affiliated TUs	Largest TU	Second largest TU	Members of all TUs	Members of affiliated TUs	Density of TU members (%)	Density of workforce (%)	Sectoral workforce	% of EU sectoral workforce	% of national workforce
DE	1/3	X		630,000	600,000	95	67	887,200	25	2.2
IT	3/3	X	X	284,000	284,000	96	64	425,300	11.9	1.9
FR	6/9	X	X	65,000	47,350	73	12	408,300	11.5	1.5
PL	2/5	X	X	13,169	10,969	83	4	370,500	10.4	2.3
ES	4/5	X	X	39,784	36,784	92	15	303,700	8.5	1.6
CZ	1/2	X		50,050	28,600	57	20	143,000	4	2.8
HU	2/2	X	X	28,836	28,836	100	24	121,000	3.4	2.7
BE	5/5	X	X	58,536	58,536	100	53	109,700	3.1	2.3
NL	2/3	X	X	65,000	60,000	92	59	100,600	2.8	1.1
RO	2/2	X	X	9,440	9,440	100	10	96,100	2.7	1.3
AT	2/2	X	X	12,000	12,000	100	15	73,200	2.1	1.7
SK	1/2	X		9,360	8,700	93	14	60,700	1.7	2.4
IE	1/2	X		6,000	5,000	83	24	59,100	1.7	2.6
DK	2/2	X	X	16,185	16,185	100	29	55,700	1.6	2.0
BG	2/2	X	X	5,330	5,330	100	10	53,300	1.5	1.8
PT	3/7	X	X	7,750	7,600	98	16	53,100	1.5	1.1
SE	3/5	X	X	19,784	18,784	95	39	48,200	1.4	1.0
EL	1/3			10,000				48,200	1.4	1.3
SI	2/3	Indirect		20,155	15,975	78	35	35,000	1.0	3.7
HR	2/3	X		3,170	2,750	87	10	29,500	0.8	1.8
FI	5/5	X	X	25,900	25,900	90	83	28,200	0.8	1.1
LT	2/2	X	X	1,100	1,100	100	7	16,200	0.5	1.2
LV	1/1	X		80	80	100	1	8,100	0.2	1.0

Representativeness of the European social partner organisations: Chemical sector

EE	0/1			270				8,100	0.2	1.3
CY	0/3			1,773				4,200	0.1	1.0
MT	1/1	X		3,400	3,400	100	89	3,800	0.1	1.4
LU	2/2	X	X	2,000	2,000	100	100	2,000	0.1	0.7
EU27	56/84	23 MSs + 1 MS	16 MSs	1,388,072 = 39% of 356,4700	1,289,319	93	36	3,552,000	100	1.8

Notes: MS, Member State; TU, trade union. Colour code: the green cells indicate that all sectoral trade unions are affiliated to industriAll Europe; the pink cells indicate that none are. The national sectoral proportion of the workforce is marked yellow where it is more than 1.8%.

Source: Sectoral workforce of Eurostat LFS data Table 8 (2021)

3.1. Sector-relatedness of industriAll Europe and its member organisations in the chemical sector

IndustriAll Europe is a multisectoral European trade union organisation, involved in 11 ESSDCs. Of those 11, the chemical sector ESSDC represents the second largest sector in terms of overall EU workforce, with a total of 3.5 million employees, after the metal sector, which has 13 million employees, and before the textiles sector, with 2 million employees (Eurofound, 2019).

Regarding the sector-relatedness of the national member organisations of industriAll Europe, the organisation rate can be considered in three different dimensions: first, the different types of production in the sector (Table 3); second, the different categories of workers in the sector (Table 4); third, the different sizes of companies (Table 5).

Table 3 indicates that for all the various activities the proportion of affiliated organisations remains around 75%.

Table 3: Sector-relatedness of industriAll Europe members in terms of types of production

NACE	Specific activities/types of production in the chemical sector	% of sectoral workforce in these activities	Total number of trade unions in these activities	IndustriAll member unions	Member States with an affiliated trade union organising these activities	Member States with a trade union organising this activity but no trade union affiliated to industriAll Europe
20.1	Basic chemicals	18	66	49 (74%)	22/24	2
21	Pharmaceuticals	18	67	48 (72%)	23/25	2
22.1	Rubber	9	65	48 (74%)	22/23	1
22.2	Plastics	37	63	48 (76%)	22/23	1
	Plastic packaging		57	42 (74%)	19/21	2
	Single-use plastic		39	31 (79%)	14/15	1
20.2	Agrochemicals	1	58	42 (72%)	19/21	2
20.3	Paints	4	63	46 (73%)	22/24	2
20.4	Soap, detergents	8	58	42 (72%)	19/22	3
20.5	Glues, oils, explosives	5	57	44 (77%)	19/20	1
20.6	Man-made fibres	1	51	40 (78%)	20/22	2

Representativeness of the European social partner organisations: Chemical sector

	Nanomaterials		30	23 (77%)	9/9	0
TOTAL		100	85	59 (69%)	25	2: no member in CY, EE

Considering the different types of workers, industriAll Europe's organisational density is strongest among the trade unions organising blue-collar workers (Table 4). Trade unions organising blue-collar workers are affiliated in 25 Member States; for white-collar workers this is the case in 24 Member States. IndustriAll Europe has affiliated trade unions organising laboratory workers in 21 Member States, management staff in 19 Member States, research and development employees in 18 Member States, subcontractors in 16 Member States and self-employed workers in 7 Member States.

Table 4: Types of workers and companies organised by trade unions

Types of workers	Number of trade unions	Number of trade unions affiliated to industriAll Europe	Member States with a trade union affiliated	Member States with a trade union organising this group but none affiliated
Management staff	54	35 (65%)	19/21	2
Research and development	47	35 (74%)	18/20	2
Laboratory workers	55	41 (75%)	21/23	2
White-collar	74	50 (68%)	24/27	3
Blue-collar	58	48 (83%)	25/27	2
Subcontractors	50	36 (72%)	16/17	1
Self employed	21	13 (62%)	7/8	1

As for the proportion of sectoral workforce affiliated to industriAll Europe, this is clearly stronger in absolute numbers of affiliated organisations covering the largest companies (Table 5).

Table 5: Proportion of all chemical sector companies for each of four size groups

Number of employees	% of sectoral companies	% of sectoral workforce	Number of trade unions	Number of affiliated trade unions	Member States with a trade union affiliated	Member States with a trade union organising these companies – none affiliated
1–9	68.3	4.4	59	44 (75%)	17/18	1
10–49	20.8	12.0	68	50 (74%)	22/23	1
50–249	8.9	24.7	74	52 (70%)	23/26	3
250+	2.6	58.9	76	52 (68%)	22/26	4

3.2. Integration in the Member States' sectoral industrial relations landscape

European Commission Decision 500 of 1998, in its Article 1, point b, includes three elements that will be assessed here:⁵

- the affiliated sectoral trade unions being an integral and recognised part of the sectoral social dialogue structures in the country, by being involved in bipartite or tripartite social dialogue or paritarian organisations, or by being consulted by government institutions
- the extent to which affiliated sectoral trade unions have the capacity to negotiate agreements determining the working conditions of the sectoral workforce – in other words they are involved in collective bargaining – and the proportion of the workforce covered by collective bargaining
- the number of affiliated sectoral trade unions that are considered representative in the national industrial relations setting of the country, and the number of Member States in which this is the case

3.2.1. Integral and recognised participation in Member States' social dialogue structures

There are a total of 35 chemical sector social dialogue structures in sixteen Member States (Belgium, Bulgaria, Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Malta, the Netherlands, Poland, Romania, Slovakia, Slovenia, Spain). In Sweden, where there is sectoral social dialogue, this is not such a structure, but only an informal social dialogue setting. Of those 35 social dialogue structures, 28 are bipartite (in eleven Member States) and 7 are tripartite (in five Member States). There are ten Member States without sectoral social dialogue for the chemical industry (Austria, Croatia, Cyprus, Czechia, Estonia, Greece, Ireland, Lithuania, Luxembourg, Portugal).

Table 6: Trade unions involved in social dialogue and collective bargaining

	Total	Those in which trade unions affiliated to industrial Europe are involved
All social dialogue (SD) structures	34 SDs in 16 Member States	31 SDs in 14 Member States
Bipartite SD structures	28 bipartite SDs in 11 Member States	28 bipartite SD structures in 11 Member States
Tripartite SD structures	7 tripartite SDs in 5 Member States	4 tripartite SDs in 3 Member States (MT, PL, SK). This is not the case for 2 SDs in BG and 1 in LV
Number of trade unions involved in sectoral SD	55 trade unions in 16 Member States	40 trade unions in 14 Member States
Trade unions consulted by government	43 trade unions in 17 Member States	31 trade unions in 17 Member States
Number of paritarian organisations	27 paritarian organisations in 15 Member States	26 paritarian organisations in 14 Member States. In the 15th Member State (EL), cross-industry actors cover the chemical sector, among others

⁵ This is how the criteria from Decision 98/500/EC are operationalised in the analyses in this chapter, not an exact quote of the text of the decision.

Representativeness of the European social partner organisations: Chemical sector

Number of trade unions involved in sectoral paritarian organisations	34 trade unions in 14 Member States	23 trade unions in 12 Member States
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Colour code: the blue rows refer to social dialogue structures (Table A31 in Annex 5), the yellow rows refer to the involvement in the co-management of paritarian institutions (Table A32 in Annex 5) and the white row refers to government consultations (Table A33 in Annex 5).

Most of the sectoral social dialogue structures are bipartite. There are 28 bipartite sectoral social dialogue structures in eleven Member States, and 6 tripartite sectoral social dialogue structures in five Member States (Bulgaria, Latvia, Malta, Poland, Slovakia). All social dialogue structures are listed in Table 31 in Annex 5.

Of those 34 social dialogue structures, there are 25 in eight Member States (Belgium, Finland, France, Hungary, Italy, Poland, Romania, Slovenia) that operate specifically for the chemical sector or for parts of the chemical sector (it is notable that 15 of these are concentrated in France). Another 12 bodies in twelve Member States (Bulgaria, Denmark, Finland, Germany, Latvia, Malta, the Netherlands, Poland, Romania, Slovakia, Slovenia, Spain) also cover other sectors, among them chemicals.

Forty industriALL Europe member trade unions in 15 Member States (Belgium, Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Malta, the Netherlands, Poland, Romania, Slovakia, Slovenia, Spain) are **involved in sector level social dialogue structures** at national level. The only two Member States where there are sectoral social dialogue structures without any involvement of industriALL Europe member unions are Bulgaria and Latvia.

A list of all social dialogue structures can be found in Table A31 in Annex 5.

Forty-three sectoral trade unions in the chemical sector are **consulted by government** institutions in 17 Member States (Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Italy, Latvia, Malta, the Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden). In all these Member States, a total of 31 industriAll Europe member unions are consulted.

There are just three Member States (Cyprus, Estonia, Greece) in which trade unions are consulted by the government where none of these trade unions are affiliated to industriAll Europe.

Sectoral trade unions are not consulted by government institutions in seven Member States (Bulgaria, Croatia, Hungary, Ireland, Latvia, Luxembourg, Romania).

There are chemical sector paritarian organisations in 15 Member States (Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Greece, Italy, Latvia, Hungary, the Netherlands, Portugal, Slovenia, Spain), with 34 trade union organisations involved in them in total. All sectoral paritarian organisations are listed in Table 32 in Annex 5. There are 27 sectoral paritarian organisations in 15 Member States. Twenty-six of them, in 13 Member States, involve trade unions that are affiliated to industriAll Europe. A list of all paritarian organisation can be found in Table 32 in Annex 5.

Twenty-three of the total 34 trade unions involved in paritarian organisations at national level are affiliated to industriAll Europe. These 23 are involved in paritarian organisations in 12 of the 15 Member States that have paritarian organisations, with the exception of Greece (where the main trade union involved is not affiliated to industriAll Europe), Austria (where the organisation reported

is the arbitration office) and Portugal (where the paritarian organisation reported focuses on business and not on labour relations).

There are no paritarian organisations in the remaining 12 Member States (Bulgaria, Croatia, Cyprus, Estonia, Ireland, Lithuania, Luxembourg, Malta, Poland, Romania, Slovakia, Sweden).

The majority of chemical sector paritarian organisations focus on developing training and skills and on monitoring the implementation of social security and pension funds. The different types of chemical sector paritarian organisations include the following: social security and pension funds (Belgium, Denmark, Italy, Spain), training funds (Belgium, Denmark, France, Greece, Hungary, Italy), a joint fund supporting finding apprenticeships (Germany), a social agreement to attract young people to study chemistry (Czechia), a sectoral experts' council for the efficiency and quality of vocational education in the chemical sector (Latvia), a sectoral competence centre to increase skills especially in occupations for which there is a shortage of workers (Slovenia), a competitiveness cluster for the chemical and related sectors (Portugal), a joint initiative for codes of conduct for the chemical industry (Germany) and a sectoral paritarian commission for equal opportunities (Spain).

Details about national sectoral social dialogue, collective bargaining and other aspects of the national sectoral industrial relations setting can be found in Annex 5, and on a country-by-country basis in Annex 7.

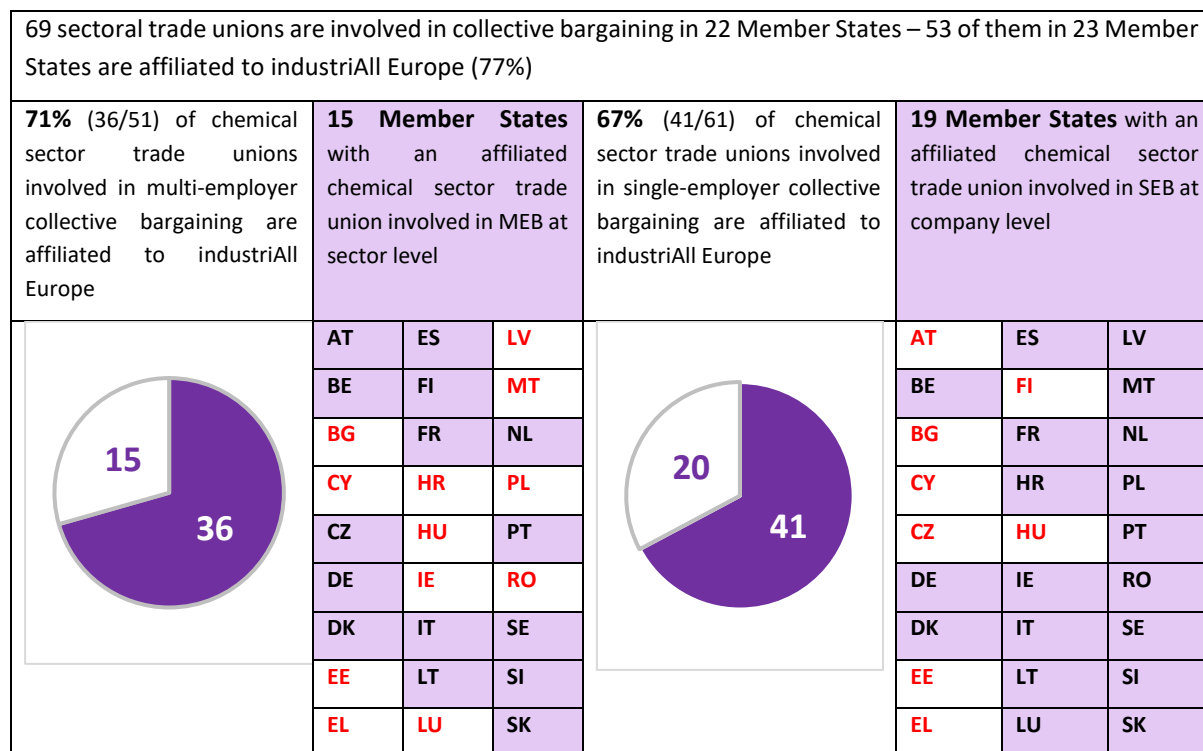
3.2.2. The capacity to negotiate collective bargaining agreements

Of all 85 trade unions, there are 74 that are involved in collective bargaining: 12 only in multi-employer bargaining (MEB) at sector or subsector level, 22 only in single-employer bargaining (SEB) at company level, and 40 in both sectoral and company-level collective bargaining.

Of the 59 trade unions affiliated to industriAll Europe, there are 53 involved in collective bargaining. The two Bulgarian trade unions, НФТ "Химия и индустрия" and НФ „Химия” – КТ „Подкрепа”, are the only two sectoral trade unions affiliated to industriAll Europe that are not involved in collective bargaining. Of all 69 sectoral trade unions involved in collective bargaining, there are thus 53 (77%) affiliated to industriAll Europe.

Figure 7 breaks this down separately for MEB at sector or subsector level and SEB at company level.

Figure 7: Trade unions with the capacity to negotiate working conditions in collective bargaining



Notes: The Member States marked in red on the left have no MEB taking place at sector level, and the Member States marked in red on the right have no SEB taking place at company level.

There are 51 sectoral trade unions involved in MEB in 15 Member States. Of them, 36 trade unions in 15 Member States are affiliated to industriAll Europe. Greece is the only Member State where there is MEB but no industriAll Europe member involved. In Hungary, there is no sector-level collective bargaining, only sectoral social dialogue between VDSZ and Mavesz, so Hungary is not counted in the Member States where trade unions are involved in MEB. In the Netherlands there is MEB at subsector level, although not for the entire chemical sector. The Member States where there is no MEB are marked red on the left in Figure 7.

On the right, SEB at company level is presented. There are 61 trade unions doing SEB in nineteen Member States. IndustriAll Europe has 41 affiliated trade unions in nineteen Member States involved in SEB.

No SEB takes place in Austria, Bulgaria, Czechia, Estonia or Finland. In Hungary, only seven companies are involved in collective bargaining at company level, so Hungary is counted among the countries with trade unions involved in SEB, but not among those where they are involved in MEB. The countries where there is no SEB are marked red on the right in Figure 7.

3.2.3. Representative status at national level of the affiliated organisations

Of the 85 trade unions there are 74 that are considered representative within the national industrial relations setting. For 34 this is by fulfilling legal requirements, for another 34 this is based on mutual recognition, and for 7 others it is a combination of fulfilling legal requirements and mutual recognition that provides the basis for their representativeness.

Among the 59 sectoral trade unions affiliated to industriAll Europe, 51 are considered representative within the national industrial relations setting. Thus 51 of the 74 national representative trade unions (69%) are affiliated to industriAll Europe. PZZ Kadra in Poland, KSS Pergam in Slovenia and SING in Croatia are three unions that reported that they are not representative; PZZ Kadra is involved in company-level collective bargaining, and SING is not involved in collective bargaining. VDSZ Pharma, in Hungary, is also not representative directly, but it is as part of VDSZ. VDSZ Pharma is involved in sectoral social dialogue and in co-signing of agreements for seven companies. This is understood as involvement in SEB at company level. There was no information about or confirmation of whether FI-USO is representative in the Spanish sectoral industrial relations system or not. This trade union is involved in company-level collective bargaining.

Table 7: Representative status of national-level organisations

Country	Trade union	Representative (Yes/No)	Legal requirement (LR)/mutual recognition (MR)	Collective bargaining	
				MEB	SEB
EU27	TOTALS	Yes: 74 No: 5 n/a: 6	LR: 35 MR: 32 Both LR and MR: 7 n/a: 12	49 trade unions out of 86 in 15 Member States	64 trade unions out of 86
Member States with trade unions		27			
Member States without trade unions		0			
AT	PRO-GE	Yes	LR, MR	Yes	No
AT	GPA	Yes	LR, MR	Yes	No
BE	BBTK-SETCa	Yes	LR, MR	Yes	No
BE	AC-CG	Yes	LR, MR	Yes	Yes
BE	ACV-CSC BIE	Yes	LR, MR	Yes	Yes
BE	ACV-CSC CNE	Yes	LR, MR	Yes	Yes
BE	ACVLB-CGSLB	Yes	LR, MR	Yes	Yes
BG	НФТ “Химия и индустрия”	Yes	LR	No	No
BG	НФ „Химия” – КТ „Подкрепа”	Yes	LR	No	No
CY	ΣΕΒΕΤΤΥΚ-ΠΕΟ	Yes	MR	No	Yes
CY	ΟΒΙΕΚ-ΣΕΚ	Yes	MR	No	Yes
CY	DEOK	n/a	n/a	No	Yes
CZ	OS ECHO	Yes	MR	Yes	No
CZ	ROSa	Yes	MR	No	No
DE	VAA ⁶	No	n/a	Yes	n/a
DE	CGBCE	n/a	n/a	n/a	n/a
DE	IG BCE	Yes	MR	Yes	Yes
DK	CO-industri	Yes	MR	Yes	No
DK	IDA	Yes	MR	No	Yes

⁶ VAA is not a representative trade union, but a professional association of academics in the chemical sector in Germany. It does, however, conclude collective bargaining agreements with BAVC at sectoral level, covering a relatively small number of employees with university degrees and in management positions.

Representativeness of the European social partner organisations: Chemical sector

EE	KAÜ	Not applicable	n/a	No	No
EL	OEXBE	Yes	MR	Yes	Yes
EL	ΟΕΦΣΕΕ/ΟΕΦΣΕΕ	Yes	MR	Yes	n/a
EL	ΠΕΦ/ΠΟΕ	No	n/a	No	No
ES	CCOO Industria	Yes	LR	Yes	Yes
ES	UGT-FICA	Yes	LR	Yes	Yes
ES	ELA	Yes	LR	No	Yes
ES	FI-USO	n/a	n/a	No	Yes
ES	FESIQ-CGT	n/a	n/a	No	Yes
FI	Sähköliitto	Yes	MR	Yes	No
FI	IL	Yes	MR	Yes	No
FI	TEK	Yes	MR	Yes	No
FI	Teollisuusliitto	Yes	MR	Yes	No
FI	Pro	Yes	MR	Yes	No
FR	CFE-CGC Chimie	Yes	LR	Yes	Yes
FR	CFTC-CMTE	Yes	LR	Yes	Yes
FR	Fédéchimie FO	Yes	LR	Yes	Yes
FR	FCE-CFDT	Yes	LR	Yes	Yes
FR	FNIC-CGT	Yes	LR	Yes	Yes
FR	FNTE-CGT	n/a	n/a	n/a	n/a
FR	FO Pharmacie	Yes, only in pharma	LR	Yes	Yes
FR	UNSA Industrie et Construction	Yes, only in rubber	LR	Yes	Yes
FR	SUD Chimie Pharma	Yes, only in pharma	n/a	Yes	Yes
HR	EKN	Yes	LR	No	Yes
HR	SING	No	LR	No	No
HR	NSP	Yes	LR	No	Yes
HU	VDSZ	Yes	LR	No	Yes
HU	VDSZ Pharma	No	n/a	No	Yes
IE	SIPTU	Yes	MR	No	Yes
IE	Connect	Yes	MR	No	Yes
IT	FILCTEM CGIL	Yes	MR	Yes	Yes
IT	FEMCA CISL	Yes	MR	Yes	Yes
IT	UILTEC UIL	Yes	MR	Yes	Yes
LT	LPPSF	Yes	MR	No	Yes
LT	LPS "Solidarumas"	Yes	MR	No	Yes
LU	OGB-L	Yes	LR	No	Yes
LU	LCGB-INDUSID	Yes	LR	No	Yes
LV	LIA	Yes	LR	No	Yes
MT	GWU	Yes	LR	No	Yes
NL	FNV	Yes	LR	No	Yes
NL	CNV	Yes	LR	No	Yes
NL	De Unie	Yes	LR	Yes	Yes
PL	SPCH NSZZ "Solidarność"	Yes	LR	No	Yes
PL	PZZ "Kadra"	Yes (via FZZ)	LR	No	Yes

PL	ZZIT	Yes	LR	No	Yes
PL	OZZZPRC	Yes	LR	No	Yes
PL	FZZPChSziC	Yes	LR	No	Yes
PT	Fiequimetal	Yes	MR	Yes	Yes
PT	SINDEQ	Yes	MR	Yes	Yes
PT	SIMA	Yes	MR	Yes	Yes
PT	COFESINT	Yes	MR	Yes	Yes
PT	SITese	Yes	MR	Yes	Yes
PT	SITEMAQ	n/a	n/a	Yes	Yes
PT	FE	Yes	MR	Yes	Yes
RO	FSLCP	Yes	LR	No	Yes
RO	FLE	Yes	LR	No	Yes
SE	IF Metall	Yes	MR	Yes	Yes
SE	Unionen	Yes	MR	Yes	Yes
SE	SI	Yes	MR	Yes	Yes
SE	Naturvetarna	Yes	MR	Yes	Yes
SE	Ledarna	Yes	MR	Yes	Yes
SI	ZSSS-KNG (member via ZSSS)	Yes	LR	Yes	Yes
SI	KSS Pergam	No	n/a	No	No
SI	SKGIPS-KS-90	Yes	LR	Yes	No
SI	KNSS	Yes	LR	Yes	Yes
SK	AZCHFP SR	Yes	LR	Yes	Yes
SK	ECHOZ	Yes	LR	Yes	Yes

Notes: n/a indicates no information available. Trade union names/abbreviations shaded in grey indicate trade unions affiliated to industriAll Europe. Cells shaded in green indicate 'YES'.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

3.3. Having adequate structures to ensure effective participation

Of the 59 sectoral trade unions affiliated to industriAll Europe, there are 26 that are involved in the decision-making structure of the organisation, which is the Executive Committee. Because industriAll Europe is a multisectoral organisation, not all its affiliated trade unions hold a mandate in this Executive Committee.

Thirty-eight of the affiliated sectoral trade unions indicated that they pay membership fees for their members in the chemical sector. The other 17 affiliated sectoral trade unions did not disclose information regarding membership fee payments, whether they pay fees only for members in other sectors, or whether they do not pay any fees to industriAll Europe.

There are 25 trade unions, almost half of the affiliated sectoral trade unions, that indicate that they are actively involved in working group activities of industriAll Europe.

The details for each of the 59 affiliated trade unions are presented in Table 8.

Table 8: Details of the trade unions' affiliation to industriAll Europe

Member State	Abbreviation	Affiliated to industriAll Europe? (Yes/No)	Involved in the Executive Committee bodies of industriAll Europe? (Yes/No)	Paying affiliation fees to industriAll Europe for its workers/members in the chemical sector? (Yes/No)	Actively involved in the working groups of industriAll Europe? (Yes/No)
TOTALS		59 trade unions	YES: 27	YES: 39	YES: 26
AT	PRO-GE	Yes	Yes	Yes	Yes
AT	GPA	Yes	n/a	Yes	n/a
BE	BBTK-SETCa	Yes	No	Yes	n/a
BE	AC-CG	Yes	No	Yes	n/a
BE	ACV-CSC BIE	Yes	Yes	Yes	n/a
BE	ACV-CSC CNE	Yes	No	Yes	n/a
BE	ACVLB-CGSLB	Yes	No	Yes	n/a
BG	НФТ "Химия и индустрия"	Yes	Yes	Yes	No
BG	НФ „Химия” – КТ „Подкрепа”	Yes	Yes	Yes	No
CZ	OS ECHO	Yes	No	Yes	No
DE	CGCBE	Yes	n/a	n/a	n/a
DE	IG BCE	Yes	Yes	Yes	Yes
DK	CO-industri	Yes	Yes	Yes	Yes
DK	IDA	Yes	Yes	Yes	Yes
EL	PEF/ΠΟΕ	Yes	Yes	Yes	Yes
ES	CCOO Industria	Yes	Yes	No	Yes
ES	UGT-FICA	Yes	Yes	Yes	Yes
ES	ELA	Yes	Yes	Yes	No
ES	FI-USO	Yes	n/a	n/a	n/a
FI	Sähköliitto	Yes	n/a	n/a	n/a
FI	IL	Yes	Yes	Yes	Yes
FI	TEK	Yes	Yes	Yes	Yes
FI	YTN	Yes, indirectly	Yes, indirectly	Yes, indirectly	Yes, indirectly
FI	Teollisuusliitto	Yes	n/a	n/a	n/a
FI	Pro	Yes	n/a	n/a	n/a
FR	CFE-CGC Chimie	Yes	No	Yes	Yes
FR	CFTC-CMTE	Yes	Not answered	n/a	n/a
FR	Fédéchimie FO	Yes	Not answered	n/a	n/a
FR	FCE-CFDT	Yes	Yes	Yes	Yes
FR	FNIC-CGT	Yes	n/a	n/a	n/a
FR	FNTE-CGT	Yes	n/a	n/a	n/a
HR	EKN	Yes, via SSSH	No	Yes	No
HR	SING	Yes	No	No	No
HU	VDSZ	Yes	Yes	Yes	Yes
IE	SIPTU	Yes	n/a	n/a	n/a

Representativeness of the European social partner organisations: Chemical sector

IT	FILCTEM CGIL	Yes	n/a	n/a	Yes
IT	FEMCA CISL	Yes	n/a	n/a	Yes
IT	UILTEC UIL	Yes	n/a	n/a	Yes
LT	LPPSF	Yes	Yes	Yes	Yes
LT	LPS "Solidarumas"	Yes	Yes	Yes	No
LU	OGB-L	Yes	Yes	Yes	No
LU	LCGB-INDUSID	Yes	Yes	Yes	Yes, sometimes
LV	LIA	Yes	No	No	No
MT	GWU	Yes	Yes	Yes	Yes
NL	FNV	Yes	Yes	Yes	Yes
NL	CNV	Yes	No	No	Yes
PL	SPCH NSZZ "Solidarność"	Yes	Yes	Yes	No
PL	PZZ "Kadra"	Yes	Yes	Yes	No
PT	Fiequimetal	Yes	No	n/a	n/a
PT	SINDEQ	Yes	No	Yes	No
PT	SIMA	Yes	Yes	Yes	Yes
RO	FSLCP	Yes	No	Yes	Yes
RO	FLE	Yes, via "ATLAS"	No	Yes, via "ATLAS"	No
SE	IF Metall	Yes	Yes	Yes	Yes
SE	Unionen	Yes	n/a	Yes	n/a
SE	SI	Yes	Yes	Yes	Yes
SI	KSS Pergam	Yes	n/a	n/a	n/a
SI	ZSSS-KNG	Yes via ZSSS	No	No	No
SK	ECHOZ	Yes	No	Yes	Yes

Note: n/a indicates no information available.

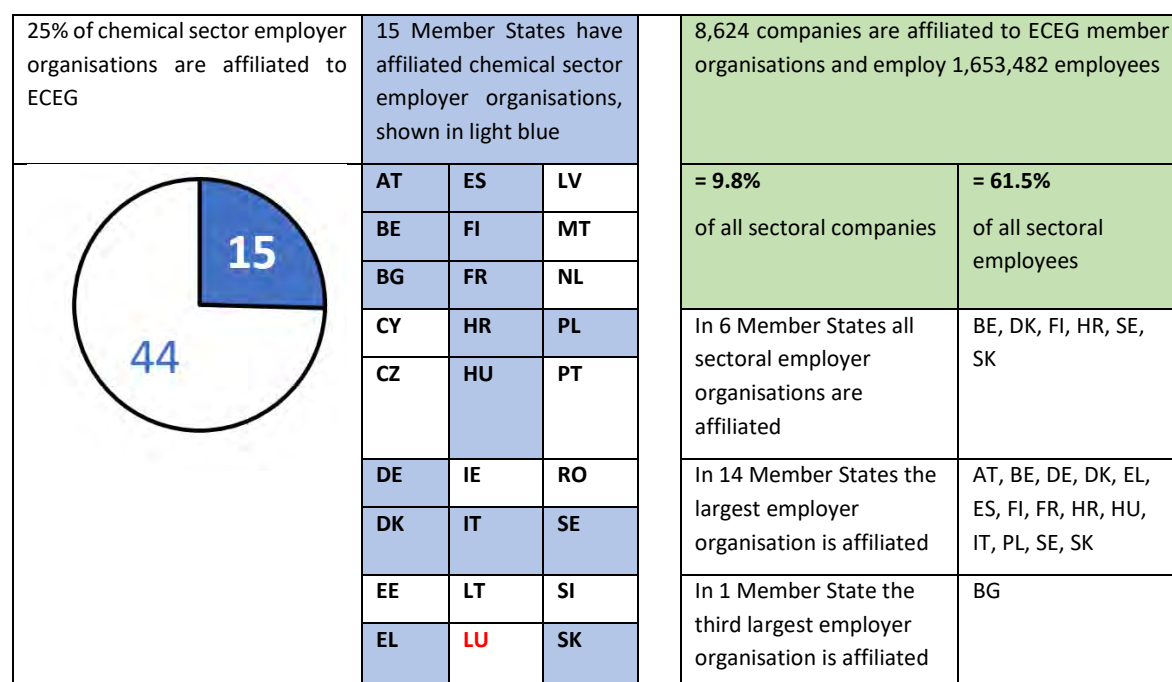
Source: Network of Eurofound Correspondents' national contributions to this study, 2021

4. ECEG

ECEG has 16 national chemical sector employer organisations affiliated from 15 EU Member States and one from the UK. The membership-based representativeness is summarised in the scoreboard in Figure 8. On the left, in blue, are presented the 15 national sectoral employer organisations out of the 61 employer organisations (25%), in 15 EU Member States.

The 12 Member States marked white in Figure 8, and marked red in Table 9, are those where ECEG does not have an affiliated employer organisation. Among them, Czechia, the Netherlands and Romania have relatively large sectoral workforces. In Czechia there are 143,000 employees in the sector, which is 4% of the EU sectoral workforce. The Netherlands and Romania have around 100,000 sectoral employees each, 2.8% and 2.7%, respectively, of the EU's sectoral workforce. The 340,000 employees in these three Member States without an ECEG affiliate correspond to 9.5% of the EU sectoral workforce. The next three Member States with no employer organisation affiliated to ECEG are Ireland, Portugal and Slovenia, with between 60,000 and 35,000 sectoral employees each, all three together corresponding to 4.1% of the EU's sectoral workforce. Lithuania has 16,200 sectoral employees, while Estonia and Latvia have 8,100 each. The remaining three EU Member States without an ECEG affiliation (Cyprus, Luxembourg and Malta) have fewer than 5,000 sectoral employees.

Figure 8: Scoreboard of the representativeness of ECEG in the chemical sector



Note: Luxembourg is marked red, because there is no sectoral employer organisation.

Source: Tables 29 and 39

In 14 of the 15 EU Member States the largest sectoral employer organisation is affiliated. Only the Bulgarian ECEG member is the third largest (out of three) at national level. In six other EU Member States the affiliated employer organisations are the only ones present in the countries. This is the

case for Belgium, Croatia, Denmark, Finland, Slovakia and Sweden. They are marked green in Table 9.

The 15 Member States that have a sectoral employer organisation affiliated to ECEG have a total of 3,022,700 employees in the sector, which corresponds to 85% of the whole EU sectoral workforce (3,564,700 persons).

In Table 9 the Member States are ranked according to the size of their sectoral workforce. Among the Member States with a sectoral workforce of 35,000 employees or more, ECEG has no member organisation in Czechia, the Netherlands, Romania, Ireland, Portugal and Slovenia. Lithuania has 16,200 sectoral employees and two sectoral employer organisations, but no affiliate to ECEG. The remaining Member States where ECEG has no member organisation (Latvia, Estonia, Cyprus, Malta, Luxembourg) each have fewer than 10,000 employees in the sector. On the right, the table marks in yellow the Member States where the proportion of the national chemical sector workforce is higher than the 1.8% average for the EU27. The Member States where this is the case and ECEG has no member are Czechia (2.8%), Ireland (2.6%) and Slovenia (3.6%). In Luxembourg there is no sectoral employer organisation.

The cells marked in blue and in orange indicate the number and percentage of ECEG's member organisations: in blue the numbers and percentages of the affiliated sectoral companies, and in orange those of their workforces.

Representativeness of the European social partner organisations: Chemical sector

Table 9: Membership strength of employer organisations affiliated to ECEG

MS	No. of affiliated EOs/total number of EOs	Largest EO	2nd largest	No. of companies affiliated to ECEG's member EO	% of sectoral companies affiliated to ECEG member EO	Total no. of sectoral companies	% of all national companies	% of EU sector companies	Density of ECEG member EO (%)	No. of employees in companies affiliated to ECEG member EO	Total of the sectoral workforce	% of national workforce	% of EU sectoral workforce
DE	1/2	X		1,700	14.5	11,728	0.5	13.3	66	585,999	887,200	2.2	25
IT	1/2	X		1,421	10.2	13,988	0.4	15.8	90	382,770	425,300	1.9	11.9
FR	1/11	X		960	14.3	6,705	0.2	7.6	60	244,980	408,300	1.5	11.5
PL	1/2	X		142	1.1	12,612	0.6	14.3	n/a	n/a	370,500	2.3	10.4
ES	1/1	X		1,500	18.5	8,094	0.3	9.2	9	27,333	303,700	1.6	8.5
CZ	0/1					5,451	0.5	6.2			143,000	2.8	4
HU	1/2	X		58	2.1	2,585	0.4	2.9	50	60,500	121,000	2.7	3.4
BE	1/1	X		720	43.6	1,653	0.2	1.9	91	100,000	109,700	2.3	3.1
NL	0/4					2,787	0.2	3.2			100,600	1.1	2.8
RO	0/2					4,012	0.7	4.5			96,100	1.3	2.7
AT	1/2	X		306	26.6	1,151	0.3	1.3	80	58,560	73,200	1.7	2.1
SK	1/1	X		45	1.9	2,328	0.4	2.6	35	21,245	60,700	2.4	1.7
IE	0/1					473	0.2	0.5			59,100	2.6	1.7
DK	1/1	X		335	36.1	927	0.4	1.1	55	30,635	55,700	2.0	1.6
BG	1/3			30	1.3	2,400	0.7	2.7	50	26,650	53,300	1.8	1.5
PT	0/10					2,124	0.2	2.4			53,100	1.1	1.5
SE	1/1	X		1,150	60.3	1,906	0.3	2.2	95	45,790	48,200	1.0	1.4
EL	1/3	X		74	3.6	2,053	0.3	2.3	90	43,380	48,200	1.3	1.4
SI	0/2					1,224	0.8	1.4			35,000	3.7	1.0
HR	1/1	X		n/a		1,507	0.8	1.7	20	5,900	29,500	1.8	0.8
FI	1/1	X		183	21.7	845	0.4	1.0	70	19,740	28,200	1.1	0.8
LT	0/2					593	0.3	0.7			16,200	1.2	0.5
LV	0/1					489	0.4	0.6			8,100	1.0	0.2
EE	0/3					342	0.4	0.4			8,100	1.3	0.2
CY	0/1					148	0.3	0.2			4,200	1.0	0.1
MT	0/1					94	0.3	0.11			3,800	1.4	0.1
LU	No EO					38	0.1	0.04			2,000	0.7	0.1
EU27	15 EOs	14 MSs		8,624	9.8	88,257		100	61.5	1,653,482	3,564,700	1.8	100

Notes: EO, employer organisation; MS, Member State. Where the national sectoral proportion of the workforce is more than 1.8%, this is marked in yellow.

4.1. Sector-relatedness of ECEG and its member organisations in the chemical sector

ECEG was established in 2002. It is a sectoral European employer organisation representing employers in the chemical, pharmaceutical, plastic and rubber industry. ECEG founded the ESSDC for the chemical industry, together with the then EMCEF (today's industriAll Europe). In 3 Member States (Belgium, Croatia and Spain) the members of ECEG cover only the chemical sector, while in 13 Member States they also include other sectors.

The sector-relatedness of the national member organisations of ECEG can be considered in terms of two dimensions: first, the different types of production in the sector (Table 10); second, the different sizes of companies (Table 11). The types of workers employed by the companies affiliated to employer organisations could potentially inform the assessment of their sector-relatedness; however, data on the proportions of different types of workers employed are not available.

Table 10: Sector-relatedness of ECEG Members in terms of types of production

NACE	Specific activities/types of production in the chemical sector	% of sectoral workforce in these activities	Total number of EOs in these activities	ECEG members (% of total number of EOs in these activities)	MSs with an EO affiliated/total number of MSs with an EO organising these activities	MSs with an EO organising these activities but no employer organisation affiliated to ECEG
20.1	Basic chemicals	18	26	14 (54%)	14/21	7
21	Pharmaceuticals	18	33	11 (33%)	11/21	10
22.1	Rubber	9	26	11 (42%)	11/22	11
22.2	Plastics	37	30	14 (47%)	13/23	10
	Plastic packaging		27	13 (48%)	12/22	10
	Single-use plastic		18	8 (44%)	7/16	9
20.2	Agrochemicals	1	23	14 (61%)	14/23	9
20.3	Paints	4	25	14 (56%)	14/23	9
20.4	Soap, detergents	8	26	13 (50%)	13/23	10
20.5	Glues, oils, explosives	5	25	13 (52%)	13/23	10
20.6	Man-made fibres	1	16	11 (69%)	11/19	8
	Nanomaterials		14	11 (79%)	11/17	6
TOTAL		100	59	16 (27%)	15	9

Notes: EO, employer organisation; MS, Member State. Nine Member States (Cyprus, Czechia, Latvia, Luxembourg, Malta, the Netherlands, Romania, Portugal, Slovenia) do not have an affiliated employer organisation. Luxembourg does not have any sectoral employer organisation.

Table 11: Membership domain by company size

Size of companies represented	% of sectoral workforce	Number of EOs organising companies in this size group	Number of EOs affiliated to ECEG (% of all EOs organising this type of companies)	MSs with an EO affiliated to ECEG	MSs with an EO but none affiliated to ECEG
1–9 employees	4.4	34 in 18 MS	6 (18%)	6	12
10–49 employees	12.0	42 in 21 MS	13 (31%)	13	8
50–249 employees	24.7	41 in 21 MS	13 (32%)	13	8
250+ employees	58.9	40 in 21 MS	13 (33%)	13	8

Note: EO, employer organisation; MS, Member State.

Sixteen employer organisations from nine Member States indicated that they have sectoral subcontractors among their members. Seven of them (43%) are affiliated to ECEG.

Table 12: Membership domain of each of the 15 ECEG member organisations

Member State	Employer organisation/business association	At least part of NACE 20	At least part of NACE 21	At least part of NACE 22	Size of companies organised, by number of employees			
					1–9	10–49	50–249	250+
EU27	59 organisations	14/37	11/34	13/36	6/34	13/42	13/41	13/40
EU27	In 24 Member States	14/23	11/22	13/21	6/18	13/21	13/21	13/21
AT	FCIO							
BE	Essenscia							
BG	БКХП				No info provided			
DE	BAVC							
DK	DI							
EL	ΣEXB				No info provided			
ES	Feique							
FI	Kemianteollisuus KT ry							
FR	France chimie							
HR	HUP-UKI							
HU	Mavesz							
IT	Federchimica							
PL	PIPC							
SE	IKEM							
SK	ZCHF							

Note: Cells marked green show the membership domains of ECEG member organisations in terms of NACE codes; cells marked blue show them in terms of the size groups of companies organised. Proportions (e.g. 14/37) indicate the number of affiliated organisations out of the total number of organisations in this category.

Concerning the proportion of sectoral organisations affiliated to ECEG, they cover all types of companies to a similar extent, representing a little over 30%. This is likely to be a reflection of the great variety of companies operating in the chemical sector across the EU, with some subsectors characterised by smaller companies and other subsectors by larger ones. For example, the pharmaceutical subsector (NACE 21) is mostly dominated by large companies in several countries, including Austria, Denmark, Hungary and Spain, that have ECEG-affiliated employer organisations, while the plastics and rubber subsectors (NACE 22) are the most fragmented among those covered by ECEG, with most companies being small.

In basic chemicals and specialty chemicals (NACE 20), 72.4% of the companies are microenterprises, with fewer than 10 employees, employing 4.1% of the workforce. In this subsector, companies with more than 250 employees represent 2.9% of companies, while employing 63.6% of the workforce in this subsector. A similar situation can be found among companies producing rubber.

Pharmaceuticals show a smaller proportion of microenterprises (57% of all pharmaceutical companies), employing only 0.8% of pharmaceutical employees. Here, the large companies with more than 250 employees represent 11% of all pharmaceutical companies, employing 86% of all pharmaceutical employees. To conclude, in the pharmaceutical subsector larger companies are relatively speaking more important. In plastics the opposite is the case: companies with more than 250 employees are 1.8% of all plastics companies, and employ 38.5% of employees. Another 35.8% of employees are employed in companies with between 50 and 249 employees. SMEs are relatively speaking more important for the plastics subsector.

4.2. Integration in the Member States' sectoral industrial relations landscape

European Commission Decision 500 of 1998, in its article 1, point b, includes three elements that will be assessed separately:⁷

- the affiliated sectoral employer organisations being an integral and recognised part of the sectoral social dialogue structures in the country, by being involved in bipartite or tripartite social dialogue or paritarian organisations, or by being consulted by government institutions⁸
- the extent to which affiliated employer organisations have the capacity to negotiate agreements determining the working conditions of the sectoral workforce – in other words they are involved in collective bargaining – and the proportion of the workforce that is covered by collective bargaining
- the number of affiliated sectoral employer organisations that are considered representative in the national industrial relations setting, and the number of Member States in which this is the case

4.2.1. Integral and recognised part of Member States' industrial relations structures

There are a total of 35 chemical sectoral social dialogue structures in 16 Member States (Belgium, Bulgaria, Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Malta, the Netherlands, Poland, Romania, Slovakia, Slovenia, Spain). In Sweden, sectoral social dialogue exists in an unstructured way, in an informal setting. Of those 35 social dialogue structures, 28 are bipartite (in eleven Member States) and 7 are tripartite (in five Member States). There are 10 Member States without sectoral social dialogue (Austria, Croatia, Cyprus, Czechia, Estonia, Greece, Ireland, Lithuania, Luxembourg, Portugal).

⁷ This is how the criteria from Decision 98/500/EC are operationalised in the analyses in this chapter, not an exact quote of the text of the decision.

⁸ Bipartite social dialogue is between trade unions and employer organisations; tripartite social dialogue is between trade unions, employer organisations and government representatives. Bilateral consultations are between government and trade unions, and/or between government and employers' organisations. Each configuration involves mutual recognition.

Table 13: Employer organisations involved in social dialogue and paritarian organisations

	Total	Employer organisations involved in SD that are ECEG members
All social dialogue (SD) structures	35 SD structures in 16 Member States	32 SD structures in 14 Member States
Bipartite SD structures	28 bipartite SD structures in 11 Member States	15 bipartite SD structures in 6 Member States (BE, DE, ES, FI, FR, HU)
Tripartite SD structures	6 tripartite SD structures in 5 Member States	2 tripartite SD structures in 2 Member States (PL, SK)
Number of employer organisations involved in sectoral SD	30 employer organisations in 16 Member States	7 employer organisations in 7 Member States
Employer organisations consulted by government	40 employer organisations in 21 Member States	15 employer organisations in 15 Member States
Number of paritarian organisations	27 paritarian organisations in 15 Member States	19 paritarian organisations in 7 Member States (BE, DE, DK, ES, FI, FR, IT) Not in AT, CZ, EL, HU, LV, NL, PT, SI (8 Member States)
Employer organisations involved in sectoral paritarian organisations	26 employer organisations in 14 Member States	7 employer organisations in 7 Member States

Note: Colour code: the blue rows refer to social dialogue structures (Table A31 in Annex 5), the orange rows refer to involvement in the co-management of paritarian institutions (Table A32 in Annex 5) and the white row refers to government consultations (Table A33 in Annex 5).

4.2.2. Capacity to negotiate collective bargaining agreements

There are 38 chemical sector employer organisations involved in sectoral collective bargaining, in eighteen Member States. In Cyprus, Estonia, Ireland, Lithuania, Latvia, Poland and Romania (seven Member States) there are employer organisations, but they are not involved in collective bargaining, while for Luxembourg there is no sectoral employer organisation. In Hungary, there is no sector-level collective bargaining, only sectoral social dialogue between Mavesz and VDSZ.

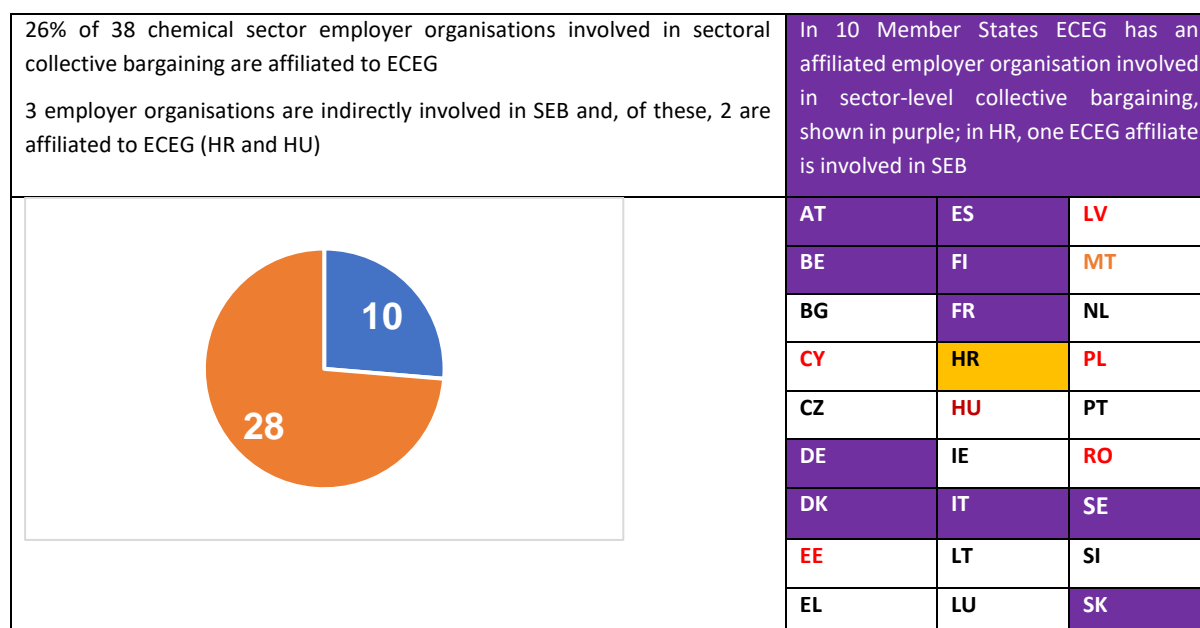
In 16 Member States there is sector-level, multi-employer collective bargaining in which employer organisations are involved. Among these, there are ECEG-affiliated employer organisations in 10 Member States. ECEG has affiliated organisations shaping working conditions in sectoral collective bargaining in Austria, Belgium, Denmark, Finland, France, Germany, Italy, Slovakia, Spain and Sweden. In Croatia, ECEG has a member (HUP-UKI) that is not involved in sectoral collective bargaining, as this does not happen in Croatia. HUP-UKI is, however, indirectly involved in company-level SEB in an advisory role. Thus, Croatia is the 11th Member State where the ECEG member is indirectly involved in collective bargaining.

The six Member States where there is sector-level, multi-employer collective bargaining, but where ECEG's affiliate members are not involved, are Bulgaria, Czechia, Greece, the Netherlands, Portugal and Slovenia. In Bulgaria and Greece, ECEG has member organisations, but they are not involved in

the sectoral collective bargaining. The employer organisations that do this sectoral collective bargaining are not affiliated to ECEG. In Czechia, the Netherlands, Portugal and Slovenia, ECEG does not have an affiliated member. In a seventh Member State, Hungary, there is no sector-level collective bargaining, only sectoral social dialogue between Mavesz and VDSZ.

In Malta there is no sectoral collective bargaining, but the employer organisation has an indirect advisory role in company-level collective bargaining. Moreover, ECEG does not have an affiliated organisation in Malta.

Figure 9: Collective bargaining scoreboard for ECEG member organisations



Note: Purple is used for the organisations doing sectoral collective bargaining (MEB). Orange is used for the involvement of employer organisations in an advisory role in SEB at company level in Malta (orange lettering) and Croatia (orange shading). In Hungary, there is no sector-level collective bargaining, only sectoral social dialogue between Mavesz and VDSZ. In the Member States marked in red, there is no collective bargaining with the involvement of employer organisations.

4.2.3. Representative status at national level of ECEG member organisations

Of the 15 ECEG member organisations in the EU there are 13 that consider themselves employer organisations, and 2 call themselves business associations.

The two business associations are ΣEXB in Greece and PIPC in Poland. ΣEXB is not a representative organisation, since there are two other Greek employer organisations that are representative in the sector, ΣEB and ΣΦΕΕ/SFEE. These two representative Greek sectoral employer organisations are both involved in collective bargaining, in a paritarian organisation and in bipartite social dialogue structures, while the Greek ECEG member organisation, ΣEXB (HACI), is not representative, not involved in collective bargaining, not in a paritarian organisation and also not in social dialogue. However, for specific issues (i.e. health, safety, security and the environment), ΣEXB (HACI) constitutes a consulting body, and it supports crucial initiatives for the chemical sector, for example the contribution to the Hellenic Transition Pathway. As for the Polish ECEG member organisation, PIPC, it considers itself a business association, and it is representative and involved in tripartite sectoral social dialogue.

Table 14 indicates that 14 of ECEG's 15 members in the EU are considered representative in the national sectoral industrial relations landscape. For eight ECEG member organisations their representative status comes from fulfilling legal criteria for representativeness (three out of eight fulfil representativeness criteria and have mutual recognition). For the six other ECEG affiliates there is mutual recognition between trade unions and employer organisations.

The right side of Table 14 indicates that 10 out of the 15 ECEG members are involved in sector-level collective bargaining and 4 have a supportive or advisory role on a case-by-case basis in company-level (single-employer) bargaining.

All 15 ECEG member organisations report that they are consulted by their governments on sector-related matters.

ECEG has 13 out of its 15 member organisations involved in national sectoral social dialogue. Eleven ECEG member organisations are involved in bipartite sectoral social dialogue and two others in tripartite sectoral social dialogue structures. ECEG's German and Greek members are not involved in social dialogue. However, the German member is involved in collective bargaining and in the management of a paritarian organisation, although the Greek one is not.

ECEG has six member organisations that are involved in the co-management (with trade unions) of sectoral paritarian organisations. These are organisations that are established on the basis of a collective bargaining agreement that manage pension funds, co-funded training, and/or health and safety institutions. Especially for microenterprises without their own human resources departments, the existence of such paritarian organisations can be important for the implementation of measures provided by collective bargaining agreements. ECEG has affiliates in such paritarian organisations in Belgium, Denmark, Finland, France, Germany and Italy.

Representativeness of the European social partner organisations: Chemical sector

Table 14: Situation in the industrial relations landscape of ECEG member organisations

Member State	Organisation	EO or BA	Representative	LR/MR	involved in bi- or tripartite SD in chemicals	Role in CB at company level	involved in paritarian organisation	No. of staff	Consulted by gov't	Involved in CB at sector level	Involved in CB at company level
ALL EOs	TOTAL: 60 EOs in 24 Member States		Yes: 51		Yes: 35		Yes: 21		Yes: 35	Yes: 40	Yes: 7
ECEG members	15 in 15 Member States	13 EOs 2 BAs	14/15		13/15		6/15		All 15	10/15	4/15
AT	FCIO	EO	Yes	LR+MR	Yes, both	CB is MEB but some examples of CA between EO (on behalf of members) and TUs, e.g. Sunday work, in which EO advises and engages	No	15	Ad hoc	Yes	No
BE	Essenscia	EO	Yes	LR+MR	Yes	Advice, support to chief executive officers or to company employer representatives	Yes	25	Regularly	Yes	No
BG	БКХП	EO	Yes	LR	Yes	No CBA, but a memorandum of cooperation	No	2	Ad hoc	No	No
DE	BAVC	EO	Yes	MR	No	No role	Yes	32	Ad hoc	Yes	No
DK	DI	EO	Yes	MR	Yes, BFA Industri (trade association)	Companies covered by the industrial agreement and the collective agreement for salaried employees, both negotiated by DI and CO-industri	Yes	640	Regularly	Yes	No
EL	ΣΕΧΒ	BA	No		No	No direct role	No	1	Ad hoc	No	No
ES	Feique	EO	Yes	LR	Yes	No role. Vast majority of companies apply the sectoral agreement. The company agreements in the sector are secondary	n/a	18	Ad hoc	Yes	No
FI	Kemianteollisuus KT ry	EO	Yes	MR	Yes, bipartite	2 company-level CAs; EO is signatory and leads in negotiations	Yes	20	Ad hoc	Yes	Yes
FR	France chimie	EO	Yes	LR	Yes, in the framework of the national CA for chemical industries (IDCC 44)	EO not involved in CB but supports and advises its members	Yes	75	Regularly	Yes	No
HR	HUP-UKI	EO	Yes	LR	Yes, indirectly	SEB. EO supports company management in negotiations	No	4	Regularly	No	Indirectly by supporting negotiations
HU	Mavesz	EO /BA	Yes	MR	Yes	No role	No	3	Ad hoc	No	No
IT	Federchimica	EO /BA	Yes	LR+MR	Yes	Deals with sectoral industrial relations and negotiates national CA with TUs. Thus sets rules of CB at company level, advises and supports companies in correct implementation of national CA	Yes	107	Regularly	Yes	No
PL	PIPC	BA	Yes	MR	Yes, tripartite team for chemical industries	n/a	No	10	Regularly	No	No
SE	IKEM	EO /BA	Yes	MR	Yes	Limited role, probably advisory	No	30	Regularly	Yes	Yes
SK	ZCHFP	EO	Yes	LR	Yes	Advising, if needed	No	4	Regularly	Yes	Exceptionally

Note: BA, business association; CA, collective agreement; CB, collective bargaining; EO, employer organisation; LR, based on legal requirements; MR, based on mutual recognition; TU, trade union.

4.3. Having adequate structures to ensure effective participation

ECEG has 15 EU member organisations and a non-EU (UK) one, and all of them are members of the ECEG Steering Committee or the Board of ECEG, which are decision-making structures of ECEG. All ECEG member organisations pay annual membership fees

Table 15: ECEG members' participation in decision-making, payment of membership fees and involvement in activities

Member State	Organisation	Actively involved in ECEG decision-making structures	Paying membership fees to ECEG	Actively involved in ECEG activities or working groups
TOTALS		YES: 15	YES: 15	YES: 15
AT	FCIO	Yes	Yes	Yes
BE	Essenscia	Yes	Yes	Yes
BG	БКХП	Yes	Yes	Yes
DE	BAVC	Yes	Yes	Yes
DK	DI	Yes	Yes	Yes
EL	ΣEXB	Yes	Yes	Yes
ES	Feique	Yes	Yes	Yes
FI	Kemianteollisuus KTräy	Yes	Yes	Yes
FR	France chimie	Yes	Yes	Yes
HR	HUP-UKI	Yes	Yes	Yes
HU	Mavesz	Yes	Yes	Yes
IT	Federchimica	Yes	Yes	Yes
PL	PIPC	Yes	Yes	Yes
SE	IKEM	Yes	Yes	Yes
SK	ZCHFP	Yes	Yes	Yes

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

5. Social partner organisations not represented

5.1. National sectoral trade unions not represented in the ESSDC

There are 28 national sectoral trade unions that are not affiliated to industriAll Europe, and thus not represented in the ESSDC for the chemical sector. Details of the membership domain of each of these trade unions can be found in Table A17 in Annex 3, where these 28 sectoral trade unions are marked red. Altogether, they represent about 79,000 sectoral employees who are members of these trade unions, corresponding to 7% of all employees in the sector who are members of trade unions, and 3% of the entire sectoral workforce. In Cyprus and Greece, the largest trade union is not affiliated; in Estonia, the only sectoral trade union is not. In eight Member States, the second largest chemical sector trade union is not affiliated to industriAll Europe. This is the case in Croatia, Cyprus, Czechia, Germany, Greece, Ireland, Slovakia and Slovenia. All details about the status of each of these trade unions in the national sectoral industrial relations landscape can be found in Table A19 in Annex 3. Except for three, all confirm that they have representative status. There are 19 trade unions that are involved in collective bargaining in 10 Member States.

Table 16: Membership strength of national trade unions not represented by industriALL Europe

Member State	Trade union	Members in chemical sector (number)	Members in chemical sector (%)	Membership trend (2–3 years)	Size ranking in sector	Representative status	Involvement in collective bargaining
CY	ΣΕΒΕΤΤΥΚ-ΠΕΟ	277	7	Stable	2nd largest	MR	
CY	ΟΒΙΕΚ-ΣΕΚ	1,221	29	Increased	1st largest	MR	
CY	ΔΕΟΚ	275	7		3rd	MR	
CZ	ROSa	21,450	15	Stable	2nd largest	MR	
DE	CG BCE	~20,000			2nd largest	??	
EE	KAÜ	270	3	Decreased	1st largest (only one)	Not applicable	
EL	ΟΕΧΒΕ	6,000	12	Decreased	1st largest	MR	
EL	ΟΕΦΣΕΕ	4,000	8		2nd largest	MR	
ES	FESIQ - CGT	3,000	1		Smaller TU	LR	
FI	TEK	2,500	9	Increased	3rd largest	LR	
FR	FO Pharmacie	~2,000	0.5		5th largest in Pharma	LR	
FR	UNSA Industrie et Construction	~2,000	0.5		5th or 6th largest	LR	
FR	SUD Chimie Pharma	1,300–1,400	0.3	Increased	7th largest	LR	
HR	NSP	420	1.5	Decreased	2nd largest	LR	
IE	Connect	~1,000	2	Stable	2nd largest	LR	
NL	De Unie	No info			n/a	LR	
PL	ZZIT	No info			n/a	LR	
PL	OZZZPRC	2,200		Increased	n/a	LR	
PL	FZZPChSziC	No info		Decreased	n/a	LR	
PT	COFESINT	Federation		Decreased	Federation, does not organise workers directly	MR	
PT	SITese	<100			Small TU	MR	
PT	SITeMAQ	<100			Small TU	MR	
PT	FE	Federation			Federation, does not organise workers directly	MR	
SE	Naturvetarna	No info			3rd or 4th largest	MR	
SE	Ledarna	No info			The smallest	MR	
SI	SKGIPS-KS-90	~5,000	≥10	Stable	2nd largest	LR	
SI	KNSS	~5,000	≥10	Stable	3rd largest	LR	
SK	AZCHFp SR	660		Decreased	2nd largest	LR	
TOTAL all TUs not affiliated to industriALL Europe		~79,000 (estimated)			3 × largest sectoral TU 8 × 2nd largest		19 TUs in 10 Member States

Notes: LR, legal requirements; MR, mutual recognition; TU, trade union; n/a information not available. The largest trade unions in the sector are marked in green, the second largest in blue and those involved in collective bargaining in pink.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

5.2. National sectoral employer organisations and business associations not represented in the ESSDC

Table 17 illustrates the membership strength of employer organisations not affiliated to ECEG. Fifteen of the employer organisations not affiliated to ECEG are the largest in their chemical sector or in a relevant subsector. Thirteen other employer organisation not affiliated to ECEG are the second largest in their country.

As already mentioned above, there is no employer organisation in the chemical sector in Luxembourg, while the membership strength of non-ECEG employer organisations in Cyprus and Romania has not been determined. This leaves another eight Member States where the largest

Representativeness of the European social partner organisations: Chemical sector

employer organisation is not affiliated to ECEG (Czechia, Estonia, Latvia, Lithuania, Malta, the Netherlands, Portugal and Slovenia).

Table 17: Membership strength of non-ECEG members

Member State	Employer organisation/ business association	No. of member companies in chemical sector	% of sectoral workforce of members	Membership trend (past 2–3 years)	Size ranking in sector	Basis of representative status	Involved in collective bargaining
TOTALS (out of 44 organisations)				Increased: 9 Stable: 11 Decreased: 2	1st largest: 15 2nd largest: 13	LR: 17 MR: 17 LR+MR: 3 Other: 7	Involved: 32 Not involved: 12
AT	BICG	1,024	20	Increased	2nd largest	LR+MR	
BG	БГФарма	15	10	Increased	n/a; only in pharmaceuticals	LR	
BG	БАП	34	40	Increased	1st largest and only one in plastics	LR	
CY	ΚΥΣΥΦ	6	6.5	Decreased	Not in top three	Not representative	
CZ	SCHP ČR	136	20	Increased	1st largest	MR	
DE	ADK	160	8	Increased	2nd largest	MR	
EE	EKTL	46	68	Stable	1st largest	No criteria	
EE	RTL	28	4.5	Increased	3rd largest	No criteria	
EE	EPL	46	No data	Stable	2nd largest	No criteria	
EL	ΣΕΒ	n/a	No data for chemical sector	Stable	1st largest	MR	
EL	ΣΦΕΕ /SFEE	62	47	Stable	1st largest	MR	
FR	FEBEA	216	23	n/a	2nd largest in chemical sector	LR	
FR	FIPEC	140	16.49 of chemical branch* 9–10 (employer organisation)	Decreased	3rd largest	LR	
FR	Ucaplast	63	8.41 of rubber*	n/a	2nd largest	LR	
FR	SNCP	120	91.59 of rubber*	n/a	1st largest in rubber branch	LR	
FR	LEEM	264	100	Stable	1st largest and only one in pharmaceuticals	LR	
FR	Polyvia	3,500	88.24 of plastics workforce*	n/a	1st largest in plastics	LR	
FR	Plastalliance	172	11.76 of plastics*	n/a	2nd largest in plastics	LR	
FR	SIMV	41	7,407 employees	n/a	2nd largest in the branch of the national collective agreement for the manufacture of and trade in pharmaceutical, para-pharmaceutical and veterinary products	LR	
FR	SIDIV	100	n/a	n/a	1st largest in branch (as above)	LR	
FR	Facophar Santé	17	1,527 employees	n/a	3rd largest in branch (as above)	LR	
HU	Magyosz	17	80	Stable	2nd largest	LR	
IE	BioPharmaChem	n/a	n/a	n/a	1st largest	Not applicable	
IT	Farindustria	200	10	Stable	2nd largest	LR+MR	

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LT ⁹	Association of Lithuanian Chemical Industry Companies – Lietuvos chemijos pramonės įmonių asociacija (LChPJA)						
LT	Association of Lithuanian Engineering and Technology Industry – Lietuvos inžinerijos ir technologijų pramonės asociacija (LINPRA)						
LV	Laķīfa	45	35	Stable	1st largest	LR+MR	
MT	MEA	80	n/a	Stable	1st largest	LR	Company level only
NL	VNCI	100	90	Increased	1st largest	LR	
NL	NRK (plastic and rubber)	n/a	n/a	n/a	2nd largest	LR	
NL	De VVVF	n/a	n/a	n/a	3rd largest	LR	
PL	PZPPF	n/a	n/a	n/a	2nd largest	MR	
PT	APQuímica	31	11	n/a	1st largest	MR	
PT	Apifarma	25	5.4	n/a	2nd largest	MR	
PT	APCAS	8	0.9	n/a	Small	MR	
PT	AIC	n/a; 12 (1 member in NACE 20.4)	Below 5; cosmetics is part of NACE 20.4 and employs 5% of chemical sector workforce	n/a	Small/very small	MR	
PT	AISDPCL	n/a; mostly outside sector	Far below 10, probably <1	n/a	Small/very small	MR	
PT	ANIRP	20	1	n/a	Small/very small	MR	
PT	APT	27	5.2	n/a	3rd largest	MR	
PT	APIP	36	4.6	n/a	4th largest	MR	
PT	APIB	1	3.5	n/a	5th largest	MR	
PT	Anipla	5	0.8	Increased	Small	MR	
RO	APDCR	18	n/a	Increased	n/a	Not applicable	
RO	Patronatul Confindustria	1	n/a	n/a	n/a	Not applicable	
SI	ACIS	n/a	Confidential	Stable	1st largest	MR	
SI	ZDS	9	65–70	Stable	2nd largest	MR	

Notes: LR, legal requirements; MR, mutual recognition; n/a no information available; TU, trade union. The organisations marked in green are the ones with the largest membership in the sector in that country, those marked in blue are the second largest and those marked in purple are involved in collective bargaining.* According to France's representativeness measure of 2021.

⁹ Besides two chemical sector employer organisations, LChPJA and LINPRA, there are in Lithuania also two subsectoral associations for pharmaceutical companies: the National Association of Pharmaceutical Industry – Nacionalinė farmacijos pramonės asociacija (NFPA) and the Association of Innovative Pharmaceutical Industry – Inovatyvios farmacijos pramonės asociacija (IFPA). LChPJA is affiliated to CEFIC, but not to ECEG.

6. Other European organisations

6.1. Other European trade union organisations

Table 18 illustrates the membership strength of European trade union associations other than industriAll Europe, namely ETUC, UNI Europa, EPSU, EFFAT, FECCIA and FEANI. Some of their member trade unions are also members of industriAll Europe. Of those not affiliated to industriAll Europe but affiliated to the other European trade union associations, none are the largest in the chemical sector in their country. FECCIA is the only other European trade union organisation with some additional representativeness in the sector.

Table 18: Other European trade union associations with affiliated chemical sector trade unions

Name	Number of members from EU Member States	Members that are also members of industriAll Europe
European Trade Union Confederation (ETUC)	5 members from 4 Member States: LPPSF (LT), GWU (MT), FNV (NL), SPCH NSZZ "Solidarność" (PL), PZZ "Kadra" (PL)	All 5 are also members of industriAll Europe
UNI Europa	5 members from 4 Member States: SIPTU (IE), SITESE (PT), CCOO Industria (ES), UGT-FICA (ES), SI (SE)	4 out of the 5 members are also members of industriAll Europe (not SITESE)
European Public Service Union (EPSU)	3 members from 3 Member States: OS ECHO (CZ), LPPSF (LT), ECHOZ (SK)	All 3 are also members of industriAll Europe
European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT)	2 members from 2 Member States: PRO-GE (AT), CO-industri (DK)	Both are also members of industriAll Europe
European Federation of National Engineering Associations (FEANI)	2 members from 2 Member States: IDA (DK), SI (SE)	Both are also members of industriAll Europe
Federation of Managerial Staff in the Chemical and Allied Industries (FECCIA)	5 members from 5 Member States: CFE-CGC Chemie (FR), Federmanager (IT), Lederna (SE), Lederne (DK), VAA (DE); CNCnCK (BE) is an observer	Only CFE-CGC Chemie

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

FECCIA is the Federation of Managerial Staff in the Chemical and Allied Industries. Its members are trade unions in five Member States (France, Denmark, Germany, Italy, Sweden) and an observer in Belgium. CFE-CGC Chimie in France and Lederna in Sweden are involved in sectoral collective bargaining. FECCIA has been cooperating with industriAll Europe and ECEG on an informal basis, as

well as in several EU-funded projects. FECCIA itself is affiliated to CEC European Managers, which is a recognised EU cross-industry social partner organisation representing managerial staff.

6.2. Other European employer organisations and business associations

Table 19: Other European associations representing business and employers in the sector

Name of the European association (subsector if applicable) and website	Number of Member States in which the organisation has affiliates	
	According to association's website	Member States with sectoral employer organisations affiliated as identified by the Network of Eurofound Correspondents' national contributions to this study, 2021
CEFIC: https://cefic.org	18 member federations plus 6 associated national federations and companies	18
Euro Chlor: https://www.eurochlor.org/about-us/	The vast majority of members are companies, as listed on the website	1
EFPIA (pharmaceuticals): https://www.efpia.eu/about-us/who-we-are/	The website lists 17 EU member associations as having delegates on the board	7
Petrochemicals Europe: https://www.petrochemistry.eu	The website lists only companies as members	0
ETRMA (tyres and rubber): https://www.etrma.org	6 national rubber associations (DE, ES, FI, FR, IT, NL)	1
EuPC (plastics converters): https://www.plasticsconverters.eu	16 plastics associations in 16 Member States	5
PlasticsEurope: https://plasticseurope.org	The website lists only companies as members	5
TEPPFA (plastic pipes): https://www.teppfa.eu/about-us/members/	National member associations from 13 Member States are listed on the website	1
VinylPlus: https://vinylplus.eu/	Unable to locate relevant members on the website	0
UIA (plastic packaging): https://uia.org	Unable to locate relevant members on the website	0
FEICA (glue): https://www.feica.eu/about-feica/organigram/national-association-members-nam	National member associations from 14 Member States are listed on the website	5
CropLife Europe: https://croplifeeurope.eu/about-us/	National member associations from 24 Member States are listed on the website	3
CIRFS (man-made fibres): https://www.cirfs.org/man-made-fibers/man-made-fibers	National member associations from 3 Member States (DE, ES, IT) are listed on the website	1
CEPE (colour industry): https://www.cepe.org/about-us/list-of-national-associations/	National member associations from 16 Member States are listed on the website	6
AISE (soaps and detergents): https://aise.eu/a-i-s-e-members/	National member associations from 21 Member States are listed on the website	5
FEEM (explosives): http://www.feem-europe.org/fr/About-FEEM/FEEM-Membership/FEEM-Members-List/	The website lists only companies as members	1
Cosmetics Europe: https://cosmeticseurope.eu/about-	National member associations from 25 Member States are listed on the website	6

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us/our-members/active-association-members		
Europur (polyurethane): https://www.europur.org/	National member associations from 3 Member States are listed on the website	0
Fecc (chemical distribution): https://www.fecc.org/	The website lists only companies as members	0

ECEG has close cooperation with the European Chemical Industry Council (CEFIC). However, CEFIC is a business association representing the chemical industry, while ECEG is a recognised European social partner organisation, covering social dialogue, employment and social affairs. Most of ECEG's members are also affiliated to CEFIC.

7. Changes in the sectoral industrial relations landscape

This chapter compares the findings of the 2014 representativeness study (Eurofound, 2014a), containing data from 2013, with the findings in this report, which captures the situation in 2022 (updated in 2024) in terms of national industrial relations actors and those represented at European level by industriAll Europe and ECEG.

7.1. Changes in the national trade unions' landscape and in the representativeness of industriAll Europe

Table 20 presents all identified national sectoral trade unions in each Member State. This report considers 85 sectoral trade unions, while the 2014 report listed 72. This comparison makes it possible to see changes; for example, in Belgium LBC has become ACV Puls and has transferred its white-collar members in the chemical sector to ACV BIE, so it is no longer related to this sector.

Table 20: All national chemical sector trade unions in 2013 and in 2020

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
Number in 2022/24	2	5	2	3	2	3	2	1	3	5	5	9	3	2
Number in 2013	2	6	2	2	2	4	1	1	2	2	3	8	1	1
	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	EU
Number in 2022/24	2	3	2	2	1	1	3	5	7	2	5	3	2	85
Number in 2013	3	3	1	2	1	2	3	4	5	2	5	2	2	72

Source: for 2013, Eurofound (2014a, Table A3, pp. 45–51)

Comparing the numbers of affiliated trade unions in each Member State makes it possible to see where more are now affiliated (marked in green) and where fewer are (marked in yellow). There are eight more affiliated trade unions, in six Member States: Croatia, Denmark, Finland, Hungary, Lithuania and Spain. In Belgium, ACV Puls is no longer sector-related, and therefore not affiliated to industriAll Europe for this sector any more.

Table 21: National chemical sector trade unions affiliated to industriAll Europe in 2013 and in 2022

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
Number in 2022/24	2	5	2	0	1	1	2	0	0	4	5	5	2	2
Number in 2013	2	6	2	0	1	1	1	0	0	2	3	5	1	1
	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	EU
Number in 2022/24	1	3	2	2	1	1	2	2	3	2	3	2	1	56
Number in 2013	1	3	1	2	1	1	2	2	3	2	3	2	1	49

7.2. Changes in the national employer organisation landscape and in the representativeness of ECEG

Table 22 counts all organisations that have members in the sector and are sector-related. The status of these organisations in the industrial relations landscape of the country may differ from case to case. Details can be found in Table A27 in Annex 3, which indicates whether organisations consider themselves employer organisations or business associations. The same table also indicates whether organisations are considered representative, whether they are involved in collective bargaining and whether they are involved in paritarian organisations.

Table 22: All national chemical sector employer organisations/business associations in 2013 and in 2020

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
Number in 2022/24	2	1	3	1	1	2	1	3	3	1	1	11	1	2
Number in 2013	3	1	2	0	1	3	1	0	1	1	1	8	1	3
	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	EU
Number in 2022/24	1	2	4	0	1	1	3	2	10	2	1	2	1	63
Number in 2013	1	9	1	1	1	1	1	1	9	1	1	2	1	57

Sources: Eurofound (2014a); Network of Eurofound Correspondents' national contributions to this study, 2021

Significant changes have occurred in the employer organisation/business association landscape in Cyprus, Estonia, France and Greece over the past decade. Three employer organisations/business associations were recorded in Estonia and one in Cyprus in 2022, while none was registered in 2013. Bulgaria, France, Greece, Lithuania, the Netherlands, Poland and Portugal also record more employer organisations/business associations in the chemical sector in 2022 than in 2013.

Conversely, no relevant employer organisation/business association was found in the chemical sector in Luxembourg in 2022, whereas one employer organisation/business association was found in 2013. Moreover, in Austria, Germany and Hungary, one fewer chemical sector employer organisation/business association was found in 2022 than in 2013.

Table 23: National chemical sector employer organisations/business associations affiliated to ECEG in 2013 and in 2022

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
Number in 2022/24	1	1	1	0	0	1	1	0	1	1	1	1	1	1
Number in 2013	1	1	1	0	1	1	1	0	0	1	1	1	1	1
	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	EU
Number in 2022/24	0	1	0	0	0	0	0	1	0	0	1	0	1	15
Number in 2013	0	1	1	0	0	0	1	1	0	0	1	0	1	17

Note: In Denmark, Plastindustrien is part of DI; only DI is an official member of ECEG.

Sources: Eurofound (2014a); Network of Eurofound Correspondents' national contributions to this study, 2021

ECEG has gained a member employer organisation/business association in Greece since 2013 but lost three members, one in Czechia, one in Lithuania and one in the Netherlands.

8. Negotiation capacity of European social partner organisations

IndustriAll Europe has 25 staff members, of whom 2 are regularly involved in activities related to the chemical sector social dialogue. In terms of its autonomy, 95% of its budget is based on membership fees from the affiliated organisations. IndustriAll Europe has a website with a members-only section to share internal documents regarding meetings, policy documents for internal consultations, and databases for internal use and for managing specific activities in cooperation with the member organisations. Chemical sector issues are dealt with in a specific chemical sector committee, but also in its industrial policy committee, its collective bargaining committee and its company policy committee. The promotion of social dialogue at all levels, including the sectoral level, is mentioned in IndustriAll Europe's statutes.

The 2021 IndustriAll Europe statutes are available on its website (IndustriAll, 2021). They provide for a detailed mandating procedure and a mechanism for nominating members to the ESSDC. Appendix II of the statutes 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 [sectoral social dialogue] 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.' IndustriAll Europe has, thus, a well-defined procedure for obtaining a mandate and getting European sectoral social dialogue texts approved by its member organisations. It has the authority to negotiate binding agreements. No binding European sectoral social dialogue agreements have yet been reached specifically for the chemical sector.

The ECEG statutes of 5 February 2024 are not publicly available on the ECEG website, but can be consulted on the official website of the Belgian Federal Public Services. Article 5 stipulates that the 'association has a mandate from its members to engage in permanent and constructive social dialogue at European level with the main European trade union organisations of the chemical, pharmaceutical, plastic and rubber industries. Moreover, the purpose of the association is to negotiate, agree upon and sign formal joint statements and agreements with the relevant European organisations and/or institutions as discussed and agreed by the Steering Committee and approved by the Governing Body (the ECEG Board) in line with the general policy set by the General Assembly.' Based on these paragraphs in Article 5 of ECEG's statutes, it can be concluded that ECEG has a fully formalised, statutory negotiation capacity, just like IndustriAll Europe.

9. Effective participation in the ESSDC

European Commission Decision 98/500/EC from 1998, on the establishment of European sectoral social dialogue committees, stipulates in its Article 1(c) that European social partner organisations ‘shall have adequate structures to ensure their effective participation in the work of the Committees’.

The adequacy of the structures to enable them to represent their members in the ESSDC, in European Commission consultations and in the negotiation of binding agreements has been analysed in Chapter 8, regarding the negotiation capacity of industriAll Europe and of ECEG. In this chapter, effective participation in ESSDC meetings is outlined.

In each of the four years considered, there were three meetings of the chemical sector ESSDC. In both 2020 and 2021, all three meetings were held online, while in 2022 and 2023 one meeting was online and the two others were held in person.

Table 24 shows that, out of the 24 Member States where industriAll Europe has affiliated sectoral trade unions, delegates from 13 Member States participated in the meetings of the ESSDC between 2020 and 2023. For ECEG, delegates from all 15 Member States’ organisations participated in meetings between 2020 and 2023. In 2020 a delegate from VNCI, from the Netherlands, participated in a meeting of the ESSDC, being at that time affiliated to ECEG. VNCI stopped its membership of ECEG in 2021. This is why the Netherlands is marked red, for the participating employers organisations in Table 24 below.

Two clarifications must be made here. First, representatives from multinational companies, not linked to any specific country, also participated in the meetings. Second, national-level representatives from both sides were present due to EU-funded projects, which involved additional delegates from the national level. These project activities are crucial for the functioning of the entire European chemical sector social dialogue.

Table 24: Overview of participation in chemical sector ESSDC meetings between 2020 and 2023

Participation	Member States	Number of Member States
Trade union delegates participating	AT, BE, BG, DE, DK, ES, FI, FR, HU, IT, MT, PT, SE	13
industriAll members but no participant in 2020–2023	CZ, HR, IE, LT, LU, LV, NL, PL, RO, SI, SK	11
Employer organisation delegates participating	AT, BE, BG, DE, DK, EL, ES, FR, HR, HU, IT, NL , PL, SE, SK	15
ECEG members but no participant in 2020–2023		0

A more detailed overview of the participation in the ESSDC meeting can be found in Table 25.

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Table25: Participation of delegates in ESDCC meetings in 2020–2023

Year	Meeting	No. of MSs	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
Trade unions affiliated to industriAll Europe																													
2020	June	9																											
	September	7																											
	December	11																											
2021	March	10																											
	June	10																											
	December	10																											
2022	March	8																											
	June	6																											
	November	6																											
2023	March	8																											
	June	7																											
	November	9																											
No. of years participated			2	4	2		4	3			4	4	4		4		4					3			4		3		
Year	Meeting	No. of MSs	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
Employer organisations affiliated to ECEG																													
2020	June	15																											
	September	8																											
	December	10																											
2021	March	8																											
	June	8																											
	December	8																											
2022	March	8																											
	June	6																											
	November	5																											
2023	March	7																											
	June	7																											
	November	5																											
No. of years participated			2	4	1		4	2			1	4	4	4	1	4		4					1	2			4		3

Colour code: the Member States where industriAll Europe and ECEG have member organisations in involved in collective bargaining shaping the working conditions in the sector are indicated in purple, those where they have member organisations not involved in collective bargaining are indicated in blue and the Member States from which there were delegates participating in meetings of the ESSDC are indicated in green.

10. Conclusions

There are 3.5 million workers in the chemical sector in the EU27, and 89,000 companies. The workers are organised by 85 trade unions in all 27 Member States, and the employers by 59 employer organisations in 26 Member States. The one Member State where there is no employer organisation is Luxembourg.

industriAll Europe has 59 national sectoral trade unions affiliated in 25 Member States. The two Member States where it has no trade union affiliated are Cyprus and Estonia. In terms of sector-relatedness, industriAll Europe organises all types of workers in the sector, in all types of economic activities and all categories of company size. In terms of membership strength, industriAll Europe organises 67% of all national sectoral trade unions, and 93% of all individual trade union members, which corresponds to 36% of the entire sectoral workforce.

In each of the other Member States except Bulgaria, industriAll Europe has an affiliated trade union involved in collective bargaining. IndustriAll Europe has a fully formalised mandating procedure and statute-based negotiation capacity.

Findings that may provide guidance for future capacity building are the 28 other national sectoral trade unions not represented in the ESSDC (listed in Table 16 in Chapter 5), and the non-participation of its member organisations from 11 Member States in ESSDC meetings indicated in Table 25. Chapter 5 identified one other relevant European trade union organisation, FECCIA, which has member organisations in five Member States.

Based on the findings documented in this study, it can be concluded that industriAll Europe is the **most representative** European trade union organisation in the chemical sector.

ECEG has 15 affiliated employer organisations in 15 Member States. In Luxembourg, there is no national sectoral employer organisation. The 10 Member States where there are national sectoral employer organisations, but none affiliated to ECEG, are (ordered by the size of the national sectoral workforce) Czechia, the Netherlands, Romania, Ireland, Portugal, Slovenia, Latvia, Lithuania, Estonia, Cyprus and Malta. Czechia, the Netherlands and Romania each have a sectoral workforce of about 96,000 or more (see Table 9 in Chapter 4). The sector-relatedness of ECEG covers all types of companies in all economic activities in the sector and in all company size groups. The membership strength of ECEG covers 25% of the national sectoral employer organisations. The 15 affiliated employer organisations organise about 7,600 companies with an estimated 1.5 million employees. This corresponds to 9% of all sectoral companies and 43% of the sectoral workforce.

ECEG has affiliated organisations involved in sectoral collective bargaining in 10 Member States: Austria, Belgium, Denmark, Finland, France, Germany, Italy, Slovakia, Spain and Sweden. In Croatia, ECEG has a member organisation that assists in company-level collective bargaining. ECEG has a statutory negotiation capacity. Strong effective participation in ESSDC meetings was recorded.

A list of other European organisations is included in Table 19 in Chapter 6.

Based on the findings documented in this study, it can be concluded that ECEG is the **most representative** European employer organisation for the chemical sector.

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Annex 1. Scope of the chemical sector

In this study, the chemical sector is described as covering the following NACE codes: 20, 21, 22 (see Table 1 below).¹⁰ Information on the membership domains of social partner organisations is also gathered for three other specific economic activities: production of plastic packaging, single-use plastics and nanomaterials.

Table A17: Demarcation of the chemical sector based on NACE codes

NACE 20	Manufacture of chemicals and chemical products
20.1	Manufacture of basic chemicals, fertilisers and nitrogen compounds, plastics and synthetic rubber in primary forms
20.2	Manufacture of pesticides and other agrochemical products
20.3	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
20.4	Manufacture of soap and detergents, cleaning and polishing preparations, perfumes and toilet preparations
20.5	Manufacture of other chemical products – explosives, glues, essential oils
20.6	Manufacture of man-made fibres
NACE 21	Manufacture of basic pharmaceutical products and pharmaceutical preparations
21.1	Manufacture of basic pharmaceutical products
21.2	Manufacture of pharmaceutical preparations
NACE 22	Manufacture of rubber and plastic products
22.1	Manufacture of rubber products
22.2	Manufacture of plastics products
Parts outside the NACE codes	
	Manufacture of plastic packaging
	Manufacture of single-use plastics
	Nanomaterials

Source: Eurostat (2023)

¹⁰ NACE is the Statistical Classification of Economic Activities in the European Community – specifically, NACE Rev. 2. For the demarcation of a specific sector, reference is made to specific NACE codes (Eurostat, 2008).

Annex 2. Specificities of the chemical sector

Economic background

According to CEFIC (2023), Europe is the second largest chemicals producer in the world in terms of sales, although the EU27's share in the world market has declined substantially, from 27% in 2002 to 14% in 2022.

The chemical sector, as defined for the purpose of this representativeness study (Eurofound, 2016), covers the subsectors NACE 20.1 **basic chemicals** and **specialty chemicals**, including NACE 20.2 (pesticides/agrochemicals), NACE 20.3 (paints, coatings, ink), NACE 20.4 (soap, detergents, perfume, toilet preparations), NACE 20.5 (other chemicals – explosives, glues, essential oils) and NACE 20.6 (man-made fibres). The study also covers NACE 21 (**pharmaceuticals**), NACE 22.1 (**rubber products**), NACE 22.2 (**plastics products**), including single-use plastics and plastic packaging, and nanomaterials.

The activities span primarily the private sector.

This annex describes the economic background of the chemical sector in terms of employment and company structure.

Employment in the chemical sector

The chemical sector employed a little over 3.5 million workers across the EU27 in 2021 (exact figure 3,564,700 people, according to Eurostat 2021 data). Chemicals (including pharmaceuticals and rubber and plastics) is the second largest manufacturing sector (3.4 million people). It contributes 11.9% of EU27 manufacturing employment. The sector generates an even greater number of indirect jobs – up to three times higher than through direct employment.

According to Eurostat data, employment in the EU27 chemical industry (excluding pharmaceuticals and rubber and plastics) is particularly high in six subsectors: petrochemicals; paints, varnishes and similar coatings; printing ink and mastics; plastics in primary forms; perfumes and toilet preparations; soap and detergents, cleaning and polishing preparations. All of those subsectors have a significant presence in the EU27 (CEFIC, 2023).

Employment rates in the chemical sector held up reasonably well during both the 2007–2008 financial crisis and the COVID-19 pandemic. The chemical sector in Europe may have lost its leading role worldwide, but it still remains key to the European economy's export position.

As can be seen from Table A2 below, the countries with the largest sectoral workforces are the five largest EU Member States (Germany, France, Italy, Poland and Spain, in order of sectoral workforce) followed by Czechia, Belgium and Hungary, which have a sectoral workforce of over 100,000 people each. At the other end of the spectrum, Luxembourg, Cyprus and Malta each have fewer than 5,000 employees in the chemical sector.

Table A18: Number of people employed in the chemical sector in the EU (NACE 20, 21 and 22), 2021

Country	Total employment 2012	Total employment 2021	Absolute change	Relative change (%)
TOTALS	3,202,342 (based on info from 24 Member States)	2,311,110 (based on info from 15 Member States)	Increase in 10 Member States Decrease in 4 Member States Comparison n/a for 13 Member States	
AT	67,900	n/a	n/a	n/a
BE	116,853	n/a	n/a	n/a
BG	47,800	n/a	n/a	n/a
CY	2,900	n/a	n/a	n/a
CZ	121,100	150,000	+28,900	+23.86
DE	938,500	927,062	-11,438	-1.22
DK	42,543	50,000	+7,457	+17.52
EE	6,529	n/a	n/a	n/a
EL	31,778	52,170	+20,392	+64.17
ES	239,500	209,300	-30,200	-12.61
FI	29,671	n/a	n/a	n/a
FR	481,700	219,000	-262,700	-54.53
HR	19,000	20,530	+1,503	+8.05
HU	109,900	143,300	+33,400	+30.39
IE	36,296	>30,000	n/a	n/a
IT	353,227	368,784	+15,557	+4.40
LT	n/a	n/a	n/a	n/a
LU	4,956	6,371	+1,415	+28.55
LV	7,422	8,782	+1,360	+18.32
MT	2,862	3,245	+383	+13.38
NL	n/a	n/a	n/a	n/a
PL	295,900	n/a	n/a	n/a
PT	46,605	48,000	+1,395	+2.99
RO	99,900	n/a	n/a	n/a
SE	43,800	n/a	n/a	n/a
SI	n/a	31,649	n/a	n/a
SK	55,700	42,917	-12,783	-22.95

Note: n/a not available.

Sources: Network of Eurofound Correspondents' national contributions to this study, 2021; authors' calculations in columns 4 and 5

Characteristics of employment in the chemical sector

Based on the information accessed by the Network of Eurofound Correspondents, where data are available, the vast majority of people employed in the chemical sector are employees on permanent, full-time contracts. No information was provided on this aspect for nine countries (Croatia, Denmark, Estonia, Germany, Ireland, Lithuania, Malta, Poland and Slovenia). For the remaining EU Member States, the variations between countries are not high, as shown in Table A3: the highest proportion of employees in the total employment in the chemical sector is quoted as 99.3% in NACE

21 in Portugal, while the lowest is quoted as 83% in NACE 23 in Greece. In France, 88.5% are employees. In Spain, 94% of the sector workforce are permanent employees (compared with 73% for the national average); 97–98.5% work full time (compared with 85.2% for the national average); and the pharmaceutical subsector employs twice the proportion of women as the overall average for industry in the country.

Non-standard forms of employment are generally not common in the chemical sector, representing less than 10% in the countries where relevant data were found, as outlined in Table A3.

Self-employment is either non-existent or not common. In the countries where self-employment is present, it represents less than 5% of employment in the chemical sector.

Table A19: Characteristics of employment in the chemical sector

Country	Proportion of employees	Proportion of fixed-term contracts	Proportion of self-employed
AT	Majority of employees in standard contracts	Low (hardly any non-standard forms of employment). Low share of temporary agency workers (below 5%)	No self-employed
BE	Vast majority	n/a	Less than 1% of sector
BG	Majority of employees in standard contracts	Sector uses short-term employment contracts	Some self-employed
CY	Vast majority are full-time employees	Not common	Not common
CZ	Standard forms of employment prevail	Low: 0–10% fixed-term contracts, depending on subsector	0–5% self-employed, and 0–6% part time, depending on subsector
DE	n/a	34,172 workers with non-standard mini-job contracts, most in NACE 22	n/a
DK	n/a	10% part time	0.5% of workforce is self-employed
EE	n/a	Not many temporary workers	Not many self-employed
EL	96% in NACE 20 97% in NACE 21 83% in NACE 22	NACE 20: n/a NACE 21: 2.9% (685 out of 16,211) NACE 22: 3% (329 out of 12,254)	NACE 20, 167; NACE 21, 0; NACE 22: 318. Out of total employment: NACE 21: 16,211 NACE 22: 23,705 NACE 23: 12,254 Corresponding to: NACE 21: 1% NACE 22: 0 NACE 23: 2.5%
ES	97–98.5% full-time (vs 85.2% national average)	94% permanent employees (vs 73% national average); pharmaceuticals employs twice the proportion of women as the overall average for industry	n/a
FI	Majority are full-time employees	Not common	n/a
FR	88.5%	5.6% on fixed-term contracts (6.8% of companies surveyed in 2019 used temporary workers)	n/a
HR	n/a	Not common (e.g. only 170 or 0.83% of total sector employees work part time)	n/a
HU	Standard forms of employment prevail	n/a	n/a
IE	n/a	n/a	n/a
IT	Mostly employees in NACE 20 and 21. In 2027, 329,958 employees out of 368,784, so ~89.5% are employees	Not common in NACE 20 and 21. NACE 22 has higher share of temporary workers and employees of external contractors	Not common in NACE 20 and 21. NACE 22 has higher share of self-employed
LT	n/a	Share of subcontractors is low	Share of self-employment is low
LU	Majority of employees in classic contracts	Not many non-standard forms	No self-employed

Representativeness of the European social partner organisations: Chemical sector

LV	8,653 employees out of 8,782 total, so 98.5% employees	Not many in non-standard forms of employment. Subcontractors not active in the sector	Not many self-employed
MT	n/a	Subcontractors active in the sector	No self-employed
NL	n/a, mainly regular full-time contracts	Subcontractors active in the sector	n/a
PL	n/a	Trade unions are trying to limit non-standard forms. Some companies employ temporary agency workers	n/a
PT	99.3% in NACE 21 and 97.6% in NACE 20 and NACE 22 are employees; this is higher than in manufacturing (96.1%)	Non-standard forms of employment are not of major importance	No data on subcontractors, short-term contracts and non-standard forms
RO	Standard employment is prevalent	Collective agreements often cover subcontracted workers, leading to uniform working conditions	n/a
SE	Majority on permanent, full-time contracts	Non-standard forms are rare	n/a
SI	n/a	20% of total workforce are agency workers (as reported by the largest trade union KNG, mostly in NACE 22, manufacture of plastics and rubber products). Total: 31,649	~1.5% of total employment (496 employees in 326 self-employed entities, 285 of them in NACE 22)
SK	Majority are full-time employees	n/a	Less than 5% self-employed

Note: n/a, detailed information not available.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Staff characteristics

As can be seen from Table A4, the proportion of management staff varies widely between countries, from 2.5% of employees in Hungary, through 20–30% in France and Finland, to 45% in Malta.

Regarding the skills level of sectoral workers (as reported by the Network of Eurofound Correspondents), a high share of low- to medium-skilled employees is reported in at least 10 countries (Bulgaria, Croatia, Cyprus, Estonia, Lithuania, Luxembourg, the Netherlands, Portugal, Romania and Slovakia), the majority of them being employed as blue-collar workers.

Conversely, in five countries (Belgium, France, Italy, Spain and Sweden) it is white-collar workers that are the majority of employees in the chemical sector, while in Austria and Finland the proportions of blue-collar and white-collar workers are equal.

Table A20: Proportions of managers and blue- and white-collar workers in the chemical sector (%)

Country	Proportion of management staff	Proportion of blue-collar workers	Proportion of white-collar workers
AT	5	49	51
BE	n/a	34	66
BG	6	65	35
CY	10	80	20
CZ	5–25	n/a	n/a
DE	n/a	No data. 12% of all workers in the chemical sector are low-skilled, 71% are medium-skilled	No data. About 71% are skilled and ~17% have tertiary education
DK	5	Low-skilled 42%, medium-skilled 22%	Medium-skilled 22%; highly skilled 22%
EE	11	70	30
EL	NACE 20, 7.5; NACE 21, 3.1; NACE 22, 3.3	NACE 20, 68; NACE 21, 47; NACE 22, 77.5	NACE 20, 32; NACE 21, 53; NACE 22, 22.5
ES	n/a	40	60
FI	20–30	50	50

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FR	25	25	75
HR	10	65	35
HU	1–2.5	NACE 20, 60; NACE 21, 40; NACE 22, 80	NACE 20, 40; NACE 21, 60; NACE 22, 20
IE	<10	n/a: lab staff and general operatives probably the majority (plus some supervisors)	'Blue-collar' is not appropriate for lab workers, who may nevertheless be doing manual work
IT	n/a	20	80
LT	No data	65	35
LU	n/a	65	35
LV	NACE 20, 14.7; NACE 21, 12.2; NACE 22, 12.6	n/a	n/a
MT	45	65	35
NL	10	70	30
PL	n/a	60	40
PT	Share of senior officials (<i>quadros superiores</i>) in NACE 20 (11.8%) and NACE 21 (9.5%) is far above the average for manufacturing (4.2%). Share in NACE 22 (3%) is far below average	80	20
RO	No data, but trade union interviews indicate small proportion	No data, but the proportion of blue-collar workers is higher than that of white-collar workers	No data, but the proportion of blue-collar workers higher than that of white-collar workers
SE	No data	No data, but, based on trade union membership data, white-collar workers make up the majority of employees	No data, but, based on TU membership data, white-collar workers make up the majority of employees
SI	15–20	35–40 (as reported by trade union KNG)	
SK	Estimated 5–15 (no official data are available)	80	20

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Work accidents and working conditions

Table A21: Reported work accidents, 2016–2020

Country	Total work accidents	Total fatal accidents
AT	7,458	2 (in 2020)
BE	n/a	n/a
BG	n/a	n/a
CY	160	0
CZ	n/a	1 (in 2019)
DE	n/a	37
DK	2,385	0
EE	n/a	n/a
EL	n/a	n/a
ES	n/a	n/a
FI	n/a	1
FR	n/a	Fatal accidents sharply decreased from 30 in 1980 through 17 in 1990 to 3 in 2010. Since then, their average number has varied between 3 (2010, 2017) and 9 per year (2016). In 2018 and 2019, the number of fatal accidents reached 5 per year, and increased to 8 in 2020
HR	n/a	n/a
HU	5,024	7
IE	n/a	In 2018, there were 2 fatal accidents in manufacturing. Statistics available from the Health and Safety Authority are not broken down further
IT	n/a (7,051 in 2010–2014)	n/a (26 in 2010–2014)
LI	n/a	0
LU	712 (2017–2019)	n/a
LV	79 (2018–2019)	n/a
MT	n/a	n/a
NL	150	n/a
PL	n/a	3 (2016–2018)
PT	n/a	2 (2016–2018)
RO	n/a	n/a
SE	2,015	n/a
SI	n/a	n/a
SK	n/a	n/a

Note: n/a, no information available.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Characteristics of companies in the chemical sector

CEFIC (undated) quotes Eurostat data for 2020 whereby there were 29,000 companies operating in the EU27 chemical sector, accounting for 1.4% of the total number of enterprises in the EU27 manufacturing sector.

The typology of companies in the chemical branch as identified by the present representativeness study is very varied and depends on the country and subsector. Some subsectors, such as pharmaceuticals, require high investment in research and development (R&D) and are characterised by larger companies. Other subsectors, such as rubber and plastics, can accommodate a larger number of smaller companies and are quite fragmented in some countries.

This variety of company characteristics has implications for the organisation of employers in the chemical sector, since large multinationals have very different needs from small companies or microenterprises.

The chemical sector is characterised by a concentration of large and medium-sized companies in countries such as France and Germany.

In some countries, such as Belgium, Finland, Hungary and Lithuania, NACE 20 is characterised by multinationals and large and middle-sized companies, while NACE 22 is the most fragmented, with the majority of companies being small.

The pharmaceutical sector (NACE 21) is dominated by large companies in a number of countries, including Austria, Cyprus, Denmark, Hungary, Ireland, Romania and Spain.

Countries where small companies dominate the chemical sector include Croatia, Czechia, Italy and Latvia.

Table A22: Number and characteristics of companies in the chemical sector (NACE 20, 21 and 22)

Country	Total no. of companies in sector (2012)	Total no. of companies in sector (2021)	Characteristics of companies in the sector	Summary
AT	1,025	n/a	Companies in the pharmaceutical industry tend to be larger, with significantly more research activities. Companies in basic materials processing tend to be SMEs.	Larger in pharmaceuticals
BE	4,482	n/a	Employment in the chemical industry is strongly concentrated among large companies (100+ employees). The chemical subsector has the most companies with 250+ employees, and the pharmaceutical subsector the fewest. The rubber subsector has the most SMEs.	Large, 100+ or 250+ employees
BG	2,498	~2,000	Employers from the chemical industry participate in the Chamber of the Chemical Industry, in which about 30 companies are active members, with about 2,000 companies registered as chemical in the country. This includes both large enterprises and SMEs.	Both large and SMEs
CY	144	n/a	Pharmaceutical companies are by far the largest, in terms of both workforce and production. Pharmaceutical companies are also involved in exports, unlike the companies in the rest of the sector.	Large, especially in pharmaceuticals
CZ	8,216	n/a	The biggest subsector in terms of number of companies is NACE 22, with 2,879 companies. The smallest subsector is 20.6 (manufacture of man-made fibres), with 13 companies only. In all subsectors, SMEs (up to 250 employees) predominate, with 7,137 out of 8,758 companies having under 250 employees.	SMEs (up to 250 employees) prevalent
DE		4,022 in NACE 20; 788 in NACE 21; 8,010 in NACE 22	In 2019, 12,820 companies were registered with the company register in the chemical sector (NACE 20–22). Around half of these companies employed 0–9 employees. Another 26% employed 10–50 employees. Around 18% had 51–249 employees and 5% were large companies with 250+ employees. The largest companies (250+ employees) employed nearly 63% of the total workforce. Most of these companies operated in NACE 20 (4,022) and NACE 22 (8,010 companies). In NACE 20, 22% of the companies were medium-sized or large corporations. In NACE 21 and 22, this share was higher: 29% in NACE 21 and 41% in NACE 22.	Concentration of large or medium-sized companies

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DK	887	n/a	Much the largest subsector in terms of employees is pharmaceuticals, employing over half of those in the chemical sector; however, it accounts for only around 15% of companies. The Danish pharmaceutical industry is highly influenced by the largest company in the chemical sector, Novo Nordisk. It has 17,726 employees, accounting for around 35% of the total Danish chemical sector. Employees in the plastic industry account for around 24% of the chemical sector; however, half of the number of companies are in the plastic sector, implying numerous smaller companies. The plastic industry has its own sectoral business association (Plastindustrien) with approximately 270 member companies, accounting for more than 26,000 Danish jobs. However, Plastindustrien's definition of the plastic industry differs from that of this study; for example, it includes furniture and home interiors (NACE 31). Rubber production is on the small side, with 1.5% of the employees and 5% of the companies in the chemical sector.	One large company (Novo Nordisk) employing 35% of the sector
EE	223	n/a	Most of the companies are in NACE 22, followed by NACE 20. In 2017, 76–78% of the turnover was from exports (analysis by Estonia's Jobs and Skills Forecasting System, OSKA).	n/a
EL		2,062	Data from in-house processing (G. Kritikidis, INE/GSEE) based on ELSTAT (2018), show that there are 966 companies active in the chemical sector (NACE 20), 107 companies active in the pharmaceuticals sector (NACE 21) and 989 companies active in the manufacture of plastic materials and products (NACE 22).	No info on company size
ES	9,213	3,475	There were 3,475 companies in the sector in 2019. There were larger companies in pharmaceuticals, although the whole chemical sector has bigger companies than the national average.	Bigger companies than national average
FI	890	n/a	Companies in NACE 20 and 21 are usually larger. In NACE 22, the companies are often small.	
FR	8,642 (2011)	3,600	78% of employees in the rubber branch (NACE 22) work in companies with more than 250 employees. Companies in the pharmaceutical industry (NACE 21) are highly consolidated; 73% of employees work in companies with more than 250 employees. In NACE 20, there are innovative start-ups, SMEs with batch processes and large groups with several sites throughout France. 58% of employees work in companies with more than 250 employees. The plastics branch includes some 30 large French companies (such as the Faurecia group) and many family-owned or consolidated SMEs (Faiveley, Clayens). 31% of employees work in companies with more than 250 employees and 40% in companies with 50–250 employees.	Many large and medium-sized companies
HR	850	n/a	Small entrepreneurs predominate in the chemical sector. According to the data of the Institute of Economics and the Financial Agency, around 90% are small businesses, around 8% medium-sized and fewer than 2% large businesses. However, the 30 biggest companies account for around 85% of total employment.	90% small
HU	3,636	6,214	There are great differences in the number and volume of companies in the three subsectors. In NACE 20 in 2020, 942 registered companies were employing 23,600 people. In the chemical industry, multinational companies play a leading role. Among the several large and middle-sized companies, there are some flagship companies. In NACE 21, there were 139 registered companies in 2020, employing 29,500 people. In NACE 21, an average company employs more than 200 people (212 people). However, in the pharmaceuticals subsector (NACE 21) large companies employ the majority of the workforce. It is the rubber and plastic products subsector (NACE 22) where we find the highest number of companies (5,133), employing 87,500 people and with the smallest average staff/company ratio, but at the same time having the largest workforce. The rubber and plastic products sector employs 63% of the total workforce of the chemical sector (NACE 20, 21 and 22). In the rubber subsector (NACE 22.1, and especially NACE 22.11, manufacture of rubber tyres and tubes), subsidiaries of large multinational companies are important. NACE 22 is largely concentrated on tyre production; the market is split between several multinational companies. The staff of these five largest companies together account for nearly 10% of all employed people. The remaining 5,127 companies registered in 2020 in this subsector employ around 80,000 people. This means that, except for some large companies, the rubber and plastic subsector is the most fragmented of the three subsectors in the chemical sector.	NACE 20 is characterised by large and middle-sized companies. In NACE 21, the 4 largest companies employ ~50% of employees. NACE 22 is the most fragmented, in which the majority of companies are small
IE	n/a	n/a	Some large pharmaceutical companies such as Pfizer dominate the sector. They employ most people and have the largest output.	Some large companies in pharmaceuticals
IT	15,920	14,421	In the chemical sector in Italy in 2019, overall, 14,421 companies operate: 4,317 in the manufacture of chemicals and chemical products (NACE 20); 449 in the manufacture of basic pharmaceutical products and pharmaceutical preparations (NACE 21); and 9,655 in the manufacture of rubber and plastic products (NACE 22). The share of small and very small companies is particularly significant in the Italian production system. More than half of the total number employ fewer than 9 employees, adding up to 8,852 companies (2,685 in NACE 20, 166 in NACE 21 and 6,001 in NACE 22). A further 4,187 companies have between 9 and 49 employees: 1,179 in NACE 20, 94 in NACE 21 and 2,914 in NACE 22. Only 209 companies employ more than 250 employees, almost	Majority SMEs: 61% employ 1–9 people; around 29% employ 9–49 people; only 15% employ 250+ people

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			equally distributed across the three parts of the sector: 74 in NACE 20, 60 in NACE 21 and 75 in NACE 22.	
LT	461	n/a	The majority of employees in NACE 20 work in companies with over 500 employees. The majority of employees in NACE 21 work in companies with 100–250 employees. The majority of employees in NACE 22 work in small companies.	Majority of large companies in NACE 20 and small companies in NACE 22
LU	44	35	The chemical sector is not very developed in Luxembourg.	n/a
LV	416	506 (49% in NACE 20, 7% in NACE 21, 43% in NACE 22)	NACE 20: 83% of companies employ 0–9 employees; just 1 company employs 250+ employees. NACE 21: 61% of companies have 0–9 employees; 5% of companies (13 companies) have 50–249 employees (these employ 52% of all NACE 21 employees); 2 companies have 250+ employees (these 2 employ 80% of all NACE 21 employees). 14% of employees are employed by companies of 250+ employees. NACE 22: 71% of companies employ 0–9 employees; 1 company employs 250+ employees; 16 companies (7%) have 50–249 (these employ 45% of all employees in NACE 21); another 33% of employees are in the 10–49 group.	Majority of SMEs in all three subsectors
MT	117	n/a		n/a
NL	1,765	n/a	The companies in the sector are very different from each other, in terms of size, automation, etc., but there are no specific differences between different parts of the sector. In every subsector, there are large differences between companies.	n/a
PL	21,312	19,000	Small companies predominate. At the same time, one third of the market (in terms of production volume) is accounted for by the 8 largest chemical groups. Most companies (over 13,000) are registered as manufacturing rubber and plastic products (NACE 22), over 700 companies in manufacturing basic pharmaceutical products and pharmaceutical preparations (NACE 21), and over 5,100 companies in manufacturing chemicals and chemical products (NACE 20). Microenterprises are predominant in all three parts of the sector.	Small companies predominate
PT	1,918	1,300	The total number of companies in the sector (NACE 20, 21 and 22) is approximately 1,300 and represents approximately 4% of all companies in manufacturing. The share of very small companies (of 1–4 employees) in NACE 21 and 22 (18.5% and 24.3% respectively) is much lower than the average in manufacturing and in the total private economy (43.1% and 65.2% respectively). The share of medium-sized and larger companies is much higher in NACE 21 (15.2% with 100–249 employees, 6.5% with 250–499 and 3.3% with more than 500) than in the average in manufacturing (2.5%, 0.6% and 0.3% respectively). Companies in NACE 20 and 22 are slightly larger than the average in manufacturing.	n/a
RO	3,625	n/a	Large companies, with more than 250 employees, are more frequently encountered in pharmaceuticals (where they are 8.5% of the total) than in other subsectors. In the manufacture of chemicals, the number of large companies is declining.	n/a
SE	1,323	n/a	The sector is fairly mixed in terms of company sizes in all subsectors.	n/a
SI	1,235	811 (109 in NACE 20; 15 in NACE 21; 550 in NACE 22)	Smaller companies are prevalent. The majority of microenterprises and small, medium-sized and large companies are in NACE 22 (550 companies), which employs the majority of sectoral employees (15,984 workers). This subsector also has more self-employed workers (255) than other subsectors. In NACE 20, there are 109 companies, mostly microenterprises (57). In NACE 21, there are 15 companies employing almost 11,000 workers, including 7 microenterprises but also some of the most important large companies.	NACE 20: mostly microenterprises; NACE 21: 15 companies; NACE 22: mostly microenterprises
SK	2,221	2,501	In total, there are 2,501 companies, of which 1,022 in NACE 21. 703 operate in the manufacture of plastic products, followed by 319 in the manufacture of rubber products.	n/a

Notes: According to the EU definition of SMEs, medium-sized enterprises have under 250 employees, small enterprises have under 50 employees and microenterprises have under 10 employees. n/a, no information available.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

The number of companies has increased in most countries (for which data are available), with significant drops in the number of companies in France and Spain. Conversely, the number of companies in the chemical sector nearly doubled in Hungary.

Organising the chemical sector

In most countries, employers organise more easily where companies are large (Denmark, France, Germany, Ireland, Finland for NACE 20, Hungary for NACE 22, Portugal and Spain). This is true of Ireland, for example, where the larger the company/size of plant, the more likely it is to be unionised, with the caveat that some newer plants/operations do not recognise trade unions. It is also true of Spain, where bigger companies than the national average make the whole chemical sector easier to organise.

- In Portugal, the share of organised companies in the workforce is 10 percentage points higher than the average in manufacturing, according to unpublished data.
- Employers also organise to a higher extent in NACE 20 in Finland, since the companies active in this sector are usually larger.
- In Germany, there is a concentration of large or medium-sized companies in the chemical sector, which makes organising easier.
- In France, in most of the four main branches of the chemical sector (chemical industries, pharmaceutical industries, plastics industries and rubber industries), there are large industrial groups and numerous medium-sized companies, which have sufficient means to structure the various branches and have powerful employer organisations such as France chimie or LEEM.
- In Denmark, the larger the companies, the more frequently their employees are covered by collective bargaining agreements. The pharmaceutical subsector has one large company (Novo Nordisk) employing 35% of the sectoral workforce.

In subsectors where companies are small (as mentioned, for example, in Croatia, Latvia, Poland and Romania) employers may not have the interest in organising, or capacity to organise, to the same extent as large companies. For example, in Poland, the predominance of small and microenterprises makes it difficult to organise employers, and this is reflected in the membership structure of two employer organisations, PIPC and PZPPF, which mainly bring together the biggest companies and groups in the sector. In Croatia, where small enterprises predominate in the chemical sector, small entrepreneurs often do not have a particular interest in membership of the Croatian Employers' Association (CEA).

Besides the size of companies, another factor that makes it easier to organise companies in the chemical sector, as identified in Italy, is that employer organisations often provide the type of support that companies need, such as health and safety training.

In Hungary, factors that make it easier for employers to organise include the fact that in pharmaceuticals there are big, well-known companies, which have strong corporate social responsibility policies, are more willing to take part in business organisations and have themselves set up the sectoral business organisations. Conversely, the large numbers of SMEs and microenterprises in NACE 20 and NACE 22 do not have the capacity to participate.

in some countries, such as Croatia and Malta, trade unions reported higher organisational density among blue-collar workers, and a lower organisational rate among management employees.

Workforces in the different parts of the chemical sector

Labour Force Survey (LFS) data are available for NACE 20, 21 and 22. LFS breakdowns to three-digit NACE codes are not available. Table A7 shows that the chemical sector employed a little over 3.5 million workers across the EU27 in 2021, the latest year for which data were available during the course of writing this report (exact figure 3,564,700 people in 2021).

Table A23: Number of people employed (thousands) and proportion of total (%) for NACE 20, 21 and 22 in 2021, age group 15–64

Member State	NACE 20 Basic chemicals and chemical products		NACE 21 Pharmaceuticals		NACE 2 Rubber and plastics		TOTAL for the chemical sector
	Thousands	%	Thousands	%	Thousands	%	Thousands
EU27	1,227.8	34.4	881.2	24.7	1,455.7	40.8	3,564.70
AT	22.7	31.0	20.6	28.1	29.9	40.8	73.20
BE	42.7	38.9	42.3	38.6	24.7	22.5	109.70
BG	12.7	23.8	11.3	21.2	29.3	55.0	53.30
CY	n/a	n/a	3.0	71.4	1.2	28.6	4.20
CZ	34.9	24.4	15.4	10.8	92.7	64.8	143.00
DE	368.0	41.5	226.3	25.5	292.9	33.0	887.20
DK	12.2	21.9	30.2	54.2	13.3	23.9	55.70
EE	2.6	32.1	n/a	n/a	5.5	67.9	8.10
EL	9.5	19.7	24.6	51.0	14.1	29.3	48.20
ES	122.9	40.5	89.2	29.4	91.6	30.2	303.70
FI	12.4	44.0	3.8	13.5	12.0	42.6	28.20
FR	160.5	39.3	86.2	21.1	161.6	39.6	408.30
HR	4.3	14.6	9.5	32.2	15.7	53.2	29.50
HU	25.9	21.4	34.4	28.4	60.7	50.2	121.00
IE	n/a	n/a	59.1	n/a	n/a	n/a	59.10
IT	149.4	35.1	101.0	23.7	174.9	41.1	425.30
LT	6.4	39.5	n/a	n/a	9.8	60.5	16.20
LU	n/a	n/a	n/a	n/a	2.0	100.0	2.00
LV	2.3	28.4	2.6	32.1	3.2	39.5	8.10
MT	0.5	13.2	1.9	50.0	1.4	36.8	3.80
NL	44.5	44.2	23.5	23.4	32.6	32.4	100.60
PL	109.7	29.6	43.6	11.8	217.2	58.6	370.50
PT	16.0	30.1	12.5	23.5	24.6	46.3	53.10
RO	23.1	24.0	8.7	9.1	64.3	66.9	96.10
SE	17.1	35.5	13.9	28.8	17.2	35.7	48.20
SI	7.6	21.7	11.4	32.6	16.0	45.7	35.00
SK	17.7	29.2	n/a	n/a	43.0	70.8	60.70

Note: n/a, no information available.

Source: Eurostat LFS data (https://ec.europa.eu/eurostat/databrowser/product/page/lfsa_eqan22d), accessed 3 February 2023

Table A24: People employed in subsectors of the chemical sector in 2020 (thousands)

NACE	20.1	20.2	20.3	20.4	20.5	20.6	21.1	21.2	22.1	22.2
EU27	541,055	29,814	145,324	290,849	175,418	26,030	61,841	575,727	316,000	1,300,000
AT	7,196	412	2,943	2,445	3,093	3,566	5,731	11,508	2,235	29,993
BE	24,604	1,430	3,801	4,817	6,735	797	1,489	25,859	2,411	24,054
BG	4,177	669	1,665	5,797	2,003	442	n/a	n/a	6,003	25,187
CY	n/a	n/a	198	199	97	0	n/a	n/a	10	1,044
CZ	17,172	780	2,413	4,983	5,396	900	1,482	9,694	22,218	65,485
DE	202,853	4,244	45,588	60,580	59,280	8,207	5,613	167,981	84,556	365,123
DK	4,188	n/a	1,158	1,887	4,114	n/a	n/a	n/a	704	11,966
EE	949	0	623	688	198	0	n/a	n/a	542	3,606
ES	2,461	738	2,096	5,082	1,536	33	850	11,462	528	11,722
ES	34,997	3,118	14,355	29,424	14,397	2,084	13,462	37,521	22,166	77,505
FI	7,090	n/a	1,658	n/a	3,038	0	n/a	n/a	n/a	n/a
FR	84,294	11,020	15,655	87,562	23,808	570	2,165	94,259	11,857	116,160
HR	2,104	105	787	2,007	938	0	16	5,638	1,042	11,908
HU	8,309	n/a	1,628	3,470	1,216	n/a:	1,418	17,817	17,002	39,481
IE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	673	8,385
IT	37,172	2,173	20,077	30,392	20,462	2,196	15,560	52,309	44,121	137,751
LT	5,041	14	420	773	240	163	0	n/a	388	9,387
LU	n/a	0	n/a	n/a	n/a	n/a	0	n/a	n/a	2,663
LV	792	48	347	1,012	736	122	97	2,248	229	3,014
MT	n/a	n/a	129	75	n/a	0	302	782	n/a	990
NL	24,924	289	5,884	4,397	7,461	2,033	478	14,007	3,176	30,402
PL	43,295	:	10,561	30,730	8,135	1,170	1,032	22,195	42,581	186,458
PT	4,662	546	3,145	2,791	1,809	522	2,176	6,952	6,802	23,790
RO	9,166	875	4,090	3,791	1,977	946	2,650	8,064	19,681	49,151
SE	9,140	46	3,211	2,628	5,051	4	n/a	n/a	4,929	18,254
SI	1,671	162	1,686	1,220	n/a	n/a	17	n/a	4,110	11,904
SK	4,798	11	511	1,200	686	779	n/a	n/a	11,345	23,354

Note: n/a, no information available.

Source: Eurostat structural business statistics (SBS) data (Eurostat 2020)

Table A25: Proportions of people employed in the three-digit subsectors in 2020 (% of total for the chemical sector)

NACE	20.1	20.2	20.3	20.4	20.5	20.6	21.1	21.2	22.1	22.2
EU27	n/a	1.0	5.0	10.0	6.0	0.9	2.1	19.7	10.8	44.5
AT	10.4	0.6	4.3	3.5	4.5	5.2	8.3	16.6	3.2	43.4
BE	25.6	1.5	4.0	5.0	7.0	0.8	1.6	26.9	2.5	25.1
BG	9.1	1.5	3.6	12.6	4.4	1.0	n/a	n/a	13.1	54.8
CY	n/a	n/a	12.8	12.9	6.3	0.0	n/a	n/a	0.6	67.4
CZ	13.2	0.6	1.8	3.8	4.1	0.7	1.1	7.4	17.0	50.2
DE	20.2	0.4	4.5	6.0	5.9	0.8	0.6	16.7	8.4	36.4
DK	17.4	n/a	4.8	7.9	17.1	n/a	n/a	n/a	2.9	49.8
EE	14.4	0.0	9.4	10.4	3.0	0.0	n/a	n/a	8.2	54.6
EL	6.7	2.0	5.7	13.9	4.2	0.1	2.3	31.4	1.4	32.1
ES	14.1	1.3	5.8	11.8	5.8	0.8	5.4	15.1	8.9	31.1
FI	60.2	n/a	14.1	n/a	25.8	0.0	n/a	n/a	n/a	n/a
FR	18.8	2.5	3.5	19.6	5.3	0.1	0.5	21.1	2.7	26.0
HR	8.6	0.4	3.2	8.2	3.8	0.0	0.1	23.0	4.2	48.5
HU	9.2	n/a	1.8	3.8	1.3	n/a	1.6	19.7	18.8	43.7
IE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	7.4	92.6
IT	10.3	0.6	5.5	8.4	5.6	0.6	4.3	14.4	12.2	38.0
LT	30.7	0.1	2.6	4.7	1.5	1.0	0.0	n/a	2.4	57.1
LU	n/a	0.0	n/a	n/a	n/a	n/a	0.0	n/a	n/a	100.0
LV	9.2	0.6	4.0	11.7	8.5	1.4	1.1	26.0	2.6	34.9
MT	n/a	n/a	5.7	3.3	n/a	0.0	13.3	34.3	n/a	43.5
NL	26.8	0.3	6.3	4.7	8.0	2.2	0.5	15.1	3.4	32.7
PL	12.5	n/a	3.1	8.9	2.4	0.3	0.3	6.4	12.3	53.9
PT	8.8	1.0	5.9	5.2	3.4	1.0	4.1	13.1	12.8	44.7
RO	9.1	0.9	4.1	3.8	2.0	0.9	2.6	8.0	19.6	49.0
SE	21.1	0.1	7.4	6.1	11.7	0.0	n/a	n/a	11.4	42.2
SI	8.0	0.8	8.1	5.9	n/a	n/a	0.1	n/a	19.8	57.3
SK	11.2	0.0	1.2	2.8	1.6	1.8	n/a	n/a	26.6	54.7

Source: Eurostat SBS data

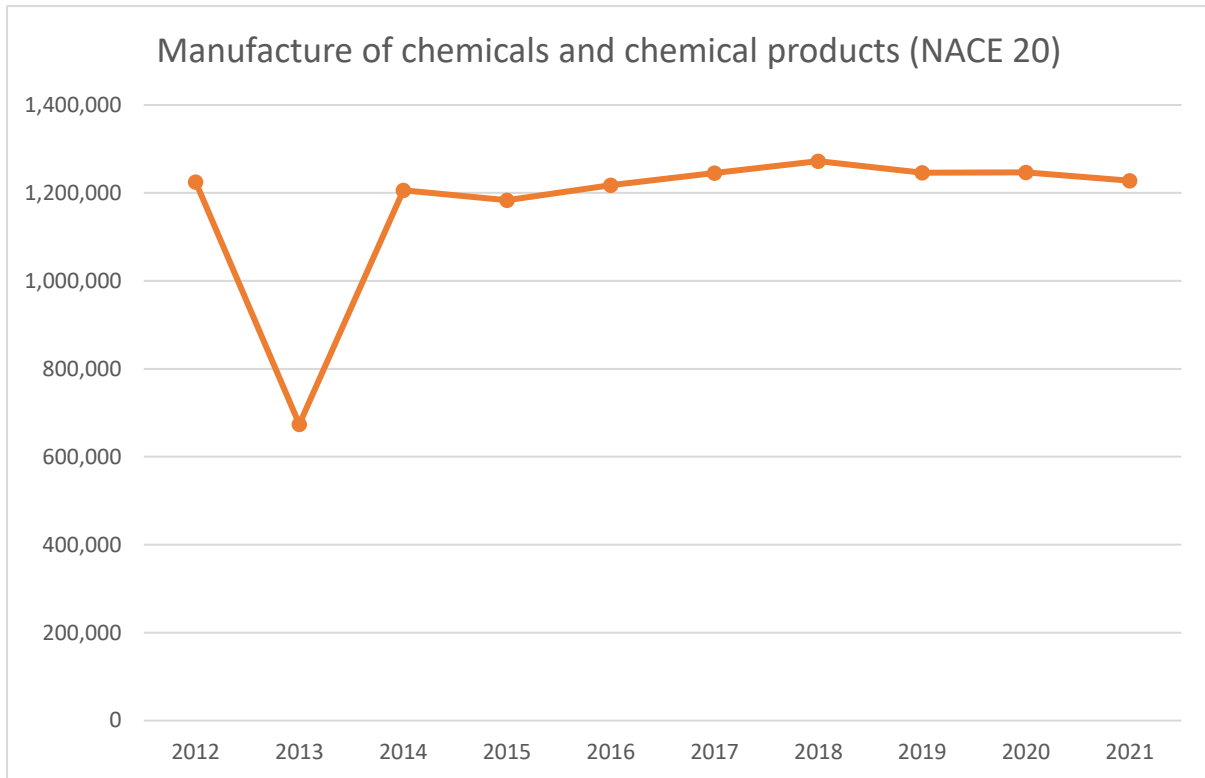
Table A26: Employment in the chemical sector, 2021

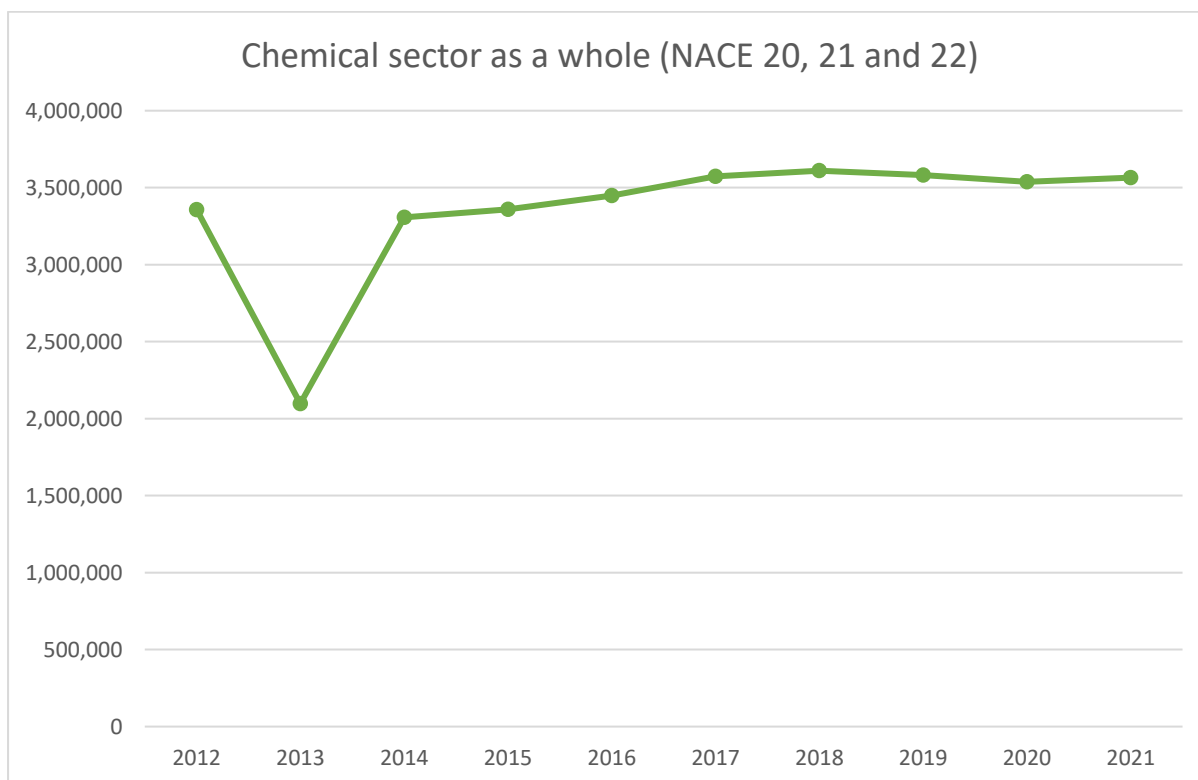
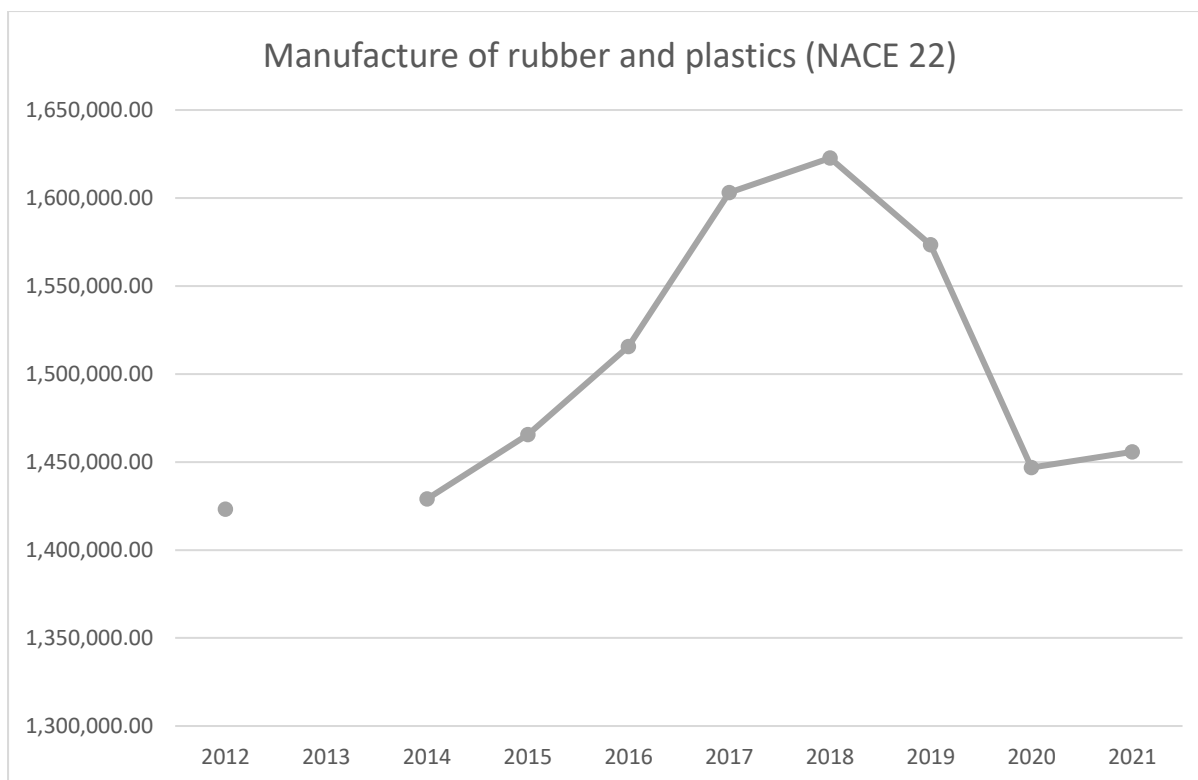
Member State	People employed in basic chemicals (NACE 20)	People employed in pharmaceuticals (NACE 21)	People employed in rubber and plastics (NACE 22)	People employed in chemical sector overall (thousands)	Member State's total employment	Share of Member State's total employment (%)	Share of EU total sectoral employment (% of 3,564,700)
EU27	1,227.8	881.2	1,455.7	3,564.7	192,963.5	1.8	100.0
DE	368	226.3	292.9	887.2	40,153.7	2.2	24.9
IT	149.4	101	174.9	425.3	21,849.2	1.9	11.9
FR	160.5	86.2	161.6	408.3	27,273.9	1.5	11.5
PL	109.7	43.6	217.2	370.5	16,237.1	2.3	10.4
ES	122.9	89.2	91.6	303.7	19,493.0	1.6	8.5
CZ	34.9	15.4	92.7	143.0	5,066.1	2.8	4.0
HU	25.9	34.4	60.7	121.0	4,535.4	2.7	3.4
BE	42.7	42.3	24.7	109.7	4,794.7	2.3	3.1
NL	44.5	23.5	32.6	100.6	8,975.1	1.1	2.8
RO	23.1	8.7	64.3	96.1	7,667.6	1.3	2.7
AT	22.7	20.6	29.9	73.2	4,231.8	1.7	2.1
SK	17.7	n/a	43	60.7	2,521.7	2.4	1.7
IE	n/a	59.1	n/a	59.1	2,289.0	2.6	1.7
DK	12.2	30.2	13.3	55.7	2,786.9	2.0	1.6
BG	12.7	11.3	29.3	53.3	2,986.7	1.8	1.5
PT	16	12.5	24.6	53.1	4,622.6	1.1	1.5
EL	9.5	24.6	14.1	48.2	3,822.8	1.3	1.4
SE	17.1	13.9	17.2	48.2	4,852.7	1.0	1.4
SI	7.6	11.4	16	35.0	954.3	3.7	1.0
HR	4.3	9.5	15.7	29.5	1,649.2	1.8	0.8
FI	12.4	3.8	12	28.2	2,469.5	1.1	0.8
LT	6.4	n/a	9.8	16.2	1,309.8	1.2	0.5
LV	2.3	2.6	3.2	8.1	822.0	1.0	0.2
EE	2.6	n/a	5.5	8.1	616.1	1.3	0.2
CY	n/a	3	1.2	4.2	417.0	1.0	0.1
MT	0.5	1.9	1.4	3.8	262.8	1.4	0.1
LU	n/a	n/a	2	2.0	302.8	0.7	0.1

Note: Ordered from the highest to the lowest number of people employed in the chemical sector. Green shading denotes the countries in which the proportion of employment in the sector is 2.4% (the EU27 average) or more of the entire national employment. These are the countries for which the chemical sector is important in terms of employment in the country. n/a, no information available.

Source: LFS, 2021

Figure A1: Numbers of people employed in NACE 20, 21 and 22 and in the chemical sector as a whole





Source: Eurostat LFS data, *Employment by sex, age and detailed economic activity (from 2008 onwards, NACE Rev. 2 two digit level) - 1 000* [LFSA_EGAN22D__custom_4832169], extracted 3 February 2023, [LFSA_EGAN22D__custom_4832637], accessed 6 February 2023

Table A27: Number of companies in the chemical sector, 2020

Member State	NACE 20 manufacture of chemicals and chemical products	NACE 21 pharmaceuticals	NACE 22 rubber and plastics	TOTAL CHEMICAL SECTOR	TOTAL BUSINESS ECONOMY*	Share of Member State total companies (%)	Share of EU total sector companies (%)
EU27	29,058	4,000	55,447	88,447	23,382,451	0.4	100
AT	446	108	597	1,151	330,625	0.3	1.3
BE	729	174	750	1,653	685,540	0.2	1.9
BG	717	54	1,629	2,400	341,227	0.7	2.7
CY	61	8	79	148	59,076	0.3	0.2
CZ	1,778	91	3,582	5,451	1,068,446	0.5	6
DE	3,727	686	7,315	11,728	2,485,804	0.5	13.3
DK	302	143	482	927	229,246	0.4	1.0
EE	119	14	209	342	85,480	0.4	0.4
EL	962	120	971	2,053	711,171	0.3	2.3
ES	3,600	360	4,134	8,094	2,683,786	0.3	9.2
FI	302	31	512	845	236,038	0.4	1.0
FR	3,474	242	2,989	6,705	3,084,048	0.2	7.6
HR	374	51	1,082	1,507	180,537	0.8	1.7
HU	672	79	1,834	2,585	668,796	0.4	2.9
IE	n/a	n/a	473	473	271,692	0.2	0.5
IT	3,991	417	9,580	13,988	3,640,489	0.4	15.8
LT	180	14	399	593	228,299	0.3	0.7
LU	15	1	22	38	35,855	0.1	0.0
LV	231	33	225	489	111,153	0.4	0.6
MT	38	21	35	94	30,950	0.3	0.1
NL	1,114	252	1,421	2,787	1,362,947	0.2	3.2
PL	3,026	366	9,220	12,612	2,066,209	0.6	14.3
PT	835	186	1,103	2,124	916,292	0.2	2.4
RO	913	128	2,971	4,012	541,144	0.7	4.5
SE	690	121	1,095	1,906	658,843	0.3	2.2
SI	245	27	952	1,224	150,261	0.8	1.4
SK	517	25	1,786	2,328	518,497	0.4	2.6

Notes: Cells highlighted in green show a share of enterprises in the chemical sector compared with the total business economy equal to or higher than the EU27 average. * Total business economy; repair of computers, personal and household goods; except financial and insurance activities. n/a, no information available.

Source: Eurostat, SBS, Annual enterprise statistics by size class for special aggregates of activities (NACE Rev. 2) [SBS_SC_SCA_R2_custom_5573797], accessed 20 March 2023

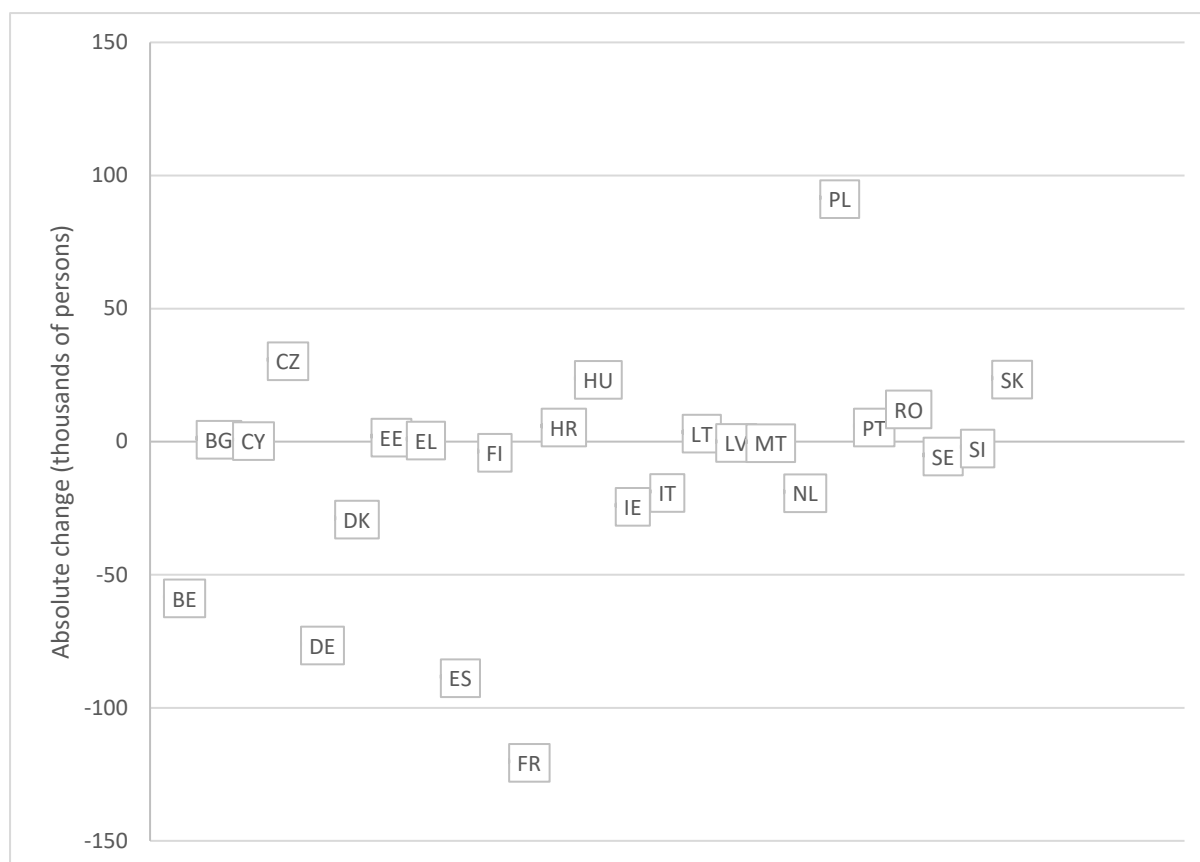
Table A28: Numbers of companies and of people employed, total and by company size class, EU27, 2020

	Number of companies by company size class, 2020				
	0–9	10–19	20–49	50–249	250+
Basic chemicals and chemical products (NACE 20)	21,000	2,727	2,600	2,504*	840
Pharmaceuticals (NACE 21)	2,281	337	335	589*	439*
Rubber (NACE 22.1)	5,840	830	616	488	196
Plastics (NACE 22.2)	31,276	5,585	5,391	4,374	847
TOTAL: 89,095	60,397	9,479	8,942	7,955	2,322
TOTAL: 100%	67.8	10.6	10.1	8.9	2.6
	Number of people employed by company size class (number of employees), 2020				
	0–9	10–19	20–49	50–249	250+
Basic chemicals and chemical products (NACE 20)	50,000	40,000**	81,978	271,781	775,279
Pharmaceuticals (NACE 21)	5,016	4,713	11,274	68,576	547,988
Rubber (NACE 22.1)	14,600	11,700	19,188	50,413	219,682
Plastics (NACE 22.2)	83,111	79,000	169,958	465,645	500,894
TOTAL: 3,470,796	152,727	135,413	282,398	856,415	2,043,843
TOTAL: 100%	4.4	3.9	8.1	24.7	58.9

Notes: * 2018 data for number of enterprises in NACE 20 and NACE 21 for companies with 50–249 employees, and for NACE 21 with 250+ employees. ** 2019 data for number of people employed in NACE 20 for companies with 10–19 employees.

Sources: Eurostat, SBS, enterprise numbers (available at https://ec.europa.eu/eurostat/databrowser/view/SBS_SC_SCA_R2_custom_5006245/default/table?lang=en), people employed (available at https://ec.europa.eu/eurostat/databrowser/view/SBS_SC_SCA_R2_custom_5005042/default/table?lang=en), accessed 6 February 2023.

Figure A2: Change in the number of people employed in the chemical sector, by Member State, 2015–2021



Note: Data not available for Luxembourg.

Source: Eurostat, LFS (employment of people aged 15 to 64), 2021, extracted 3 February 2023

As can be seen in Figure A2, France saw the highest decline in the number of people employed in the chemical sector from 2015 to 2021, to the tune of 120,700 fewer people working in the chemical sector in 2021 than in 2015. Spain and Germany also saw sectoral employment shrink, by 88,900 and 76,600 people respectively. Conversely, Poland saw by far the highest increase in sectoral employment in the EU, with 91,100 more people working in the country's chemical sector in 2021 than in 2015. This was followed by Czechia, with 30,000 more employees in the chemical sector in 2021 than in 2015.

Table A13 presents the average number of employees per company for the different parts of the sector in 2020, the latest year for which Eurostat Structural Business Statistics data are available.

Table A29: Average number of people employed per company in different parts of the sector, EU27, 2020

Member State	No. of people employed in NACE 20	No. of companies in NACE 20	Average no. of people employed per company in NACE 20	No. of people employed in NACE 21	No. of companies in NACE 21	Average no. of people employed per company in NACE 21	No. of people employed in NACE 22	No. of companies in NACE 22	Average no. of people employed per company in NACE 22
AT	19,655	446	44	17,239	108	160	32,228	597	54
BE	42,184	729	58	27,348	174	157	26,465	750	35
BG	14,753	717	21	8,173	54	151	31,190	1,629	19
CY	654	61	11	2,093	8	262	1,054	79	13
CZ	31,645	1,778	18	11,176	91	123	87,703	3,582	24
DE	380,751	3,727	102	173,594	686	253	449,679	7,315	61
DK	12,187	302	40	25,952	143	181	12,670	482	26
EE	2,458	119	21	398	14	28	4,148	209	20
EL	11,946	962	12	12,312	120	103	12,250	971	13
ES	98,375	3,600	27	50,984	360	142	99,671	4,134	24
FI	12,762	302	42	5,003	31	161	12,916	512	25
FR	222,910	3,474	64	96,424	242	398	128,017	2,989	43
HR	5,941	374	16	5,654	51	111	12,950	1,082	12
HU	15,544	672	23	19,235	79	243	56,483	1,834	31
IE	n/a	n/a	n/a	n/a	n/a	n/a	9,058	473	19
IT	112,472	3,991	28	67,869	417	163	181,872	9,580	19
LT	6,651	180	37	n/a	14	n/a	9,775	399	24
LU	1,277	15	85	n/a	1	n/a	n/a	22	n/a
LV	3,057	231	13	2,345	33	71	3,243	225	14
MT	291	38	8	1,084	21	52	n/a	35	n/a
NL	44,989	1,114	40	14,485	252	57	33,577	1,421	24
PL	n/a	3,026	n/a	23,227	366	63	229,039	9,220	25
PT	13,475	835	16	9,128	186	49	30,592	1,103	28
RO	20,845	913	23	10,714	128	84	68,832	2,971	23
SE	20,080	690	29	16,945	121	140	23,183	1,095	21
SI	6,713	245	27	n/a	27	n/a.	16,014	952	17
SK	7,985	517	15	2,191	25	88	34,699	1,786	19

Note: n/a, no information available.

Source: Eurostat, SBS, Annual enterprise statistics by size class for special aggregates of activities (NACE Rev. 2) [SBS_SC_SCA_R2_custom_5003883], 2020

Table A14 provides details of the largest employers in the chemical sector in the EU27, specifically listing the largest company in terms of workforce in each of the three subsectors: NACE 20 (chemical products), NACE 21 (pharmaceuticals) and NACE 22 (rubber and plastics).

Table A30: Largest employers in the chemical sector in 2020

Member State	Sub-sector	Largest employer in subsector	Estimated number of (sector-related) employees	Trade union(s) organising employees in company	Employer organisation employer is affiliated to	CB type applicable to employer (SEB/MEB)
AT	NACE 20	Lenzing AG	2,000	PRO-GE; GPA	FCIO	MEB
AT	NACE 21	Sandoz GmbH	5,000	PRO-GE; GPA	FCIO	MEB
AT	NACE 22	Semperit technische Produkte GmbH	740	PRO-GE; GPA	FCIO	MEB
BE	NACE 20	BASF	3,227	BBTK-SETCa; AC-CG; ACV-CSC BIE; ACLVB-CGSLB	Essenscia	SEB/MEB
BE	NACE 21	GSK Biologicals	8,882	BBTK-SETCa; AC-CG; ACV-CSC BIE; ACLVB-CGSLB	Essenscia	SEB/MEB
BE	NACE 22	Datwyler Pharma Packaging	518	ACV-CSC BIE; BBTK-SETCa; AC-CG; ACLVB-CGSLB	Essenscia	SEB/MEB
BG	NACE 20	Agropolychim-Devnq	986	CITUB; CL Podkrepa	BCCI	SEB
BG	NACE 21	Sopharma	1,860	CITUB; CL Podkrepa	Bulgarian Generic Pharmaceutical Association	SEB
BG	NACE 22	Teklas Bulgaria Kardzali	2,790	No	No	No
CY	NACE 20	n/a	n/a	n/a	n/a	n/a
CY	NACE 21	MEDOCHEMIE LTD	850	OBIEK-SEK; SEBETTYK-PEO	PHARCHEM; PASYPAGEF	SEB
CY	NACE 22	n/a	n/a	n/a	n/a	n/a
CZ	NACE 20	ORLEN Unipetrol RPA s.r.o.	1.5%	4 (1 independent, 3 basic trade unions of OS ECHO)	SCHP ČR	SEB/MEB
CZ	NACE 21	Zentiva, k. s.	0.6%	Basic trade union organisation of OS ECHO	Czech Association of Pharmaceutical Companies (ČAFF)	None
CZ	NACE 22	Continental Barum, s.r.o.	3.6%	Basic trade union organisation of OS ECHO	Confederation of Industry (SP ČR)	SEB
DE	NACE 20	*	*	*	*	*
DE	NACE 21	*	*	*	*	*
DE	NACE 22	*	*	*	*	*
DK	NACE 20	NOVOZYMES A/S	1,209 (exact no. n/a)	3F; HK (and most likely others)	Member of Danish Chamber of Commerce, Dansk Erhverv (DE)	MEB
DK	NACE 21	Novo Nordisk A/S	17,700 (exact no. n/a)	3F; HK (and most likely others)	Member of DE	MEB
DK	NACE 22	AVK GUMMI A/S	160 (exact no. n/a)	n/a	DI	MEB
EE	NACE 20	NPM Silmet	418	Silmet trade union (company level)	EKTL	No info
EE	NACE 21	n/a	n/a	n/a	n/a	n/a
EE	NACE 22	Merinvest	284	No info	None	No info

Representativeness of the European social partner organisations: Chemical sector

EL	NACE 20	Kavala Fertilizers Ltd. (ELFE SA)	700	Union of Employees of Kavala Fertilizers, affiliated to OEXB	n/a	SEB
EL	NACE 21	VIANEX	1,000	No trade union	Hellenic Federation of Enterprises (SEV)	MEB
EL	NACE 22	n/a	n/a	n/a	n/a	n/a
ES	NACE 20	BASF	2,000	CCOO; UGT	Feique	MEB
ES	NACE 21	Boehringer	1,600	CCOO; UGT	Feique	MEB
ES	NACE 22	Michelin	6,399	CCOO; UGT; USO; ELA	Feique	SEB
FI	NACE 20	Yara Suomi Oy	900	YTN-affiliated unions; probably also Industrial Union and Pro	Chemical Industry Federation of Finland	MEB
FI	NACE 21	Orion Oy	2,670	YTN-affiliated unions; probably also Industrial Union and Pro	Chemical Industry Federation of Finland	MEB
FI	NACE 22	Nokian Renkaat Oyj	880	YTN-affiliated unions; probably also Industrial Union and Pro	Chemical Industry Federation of Finland	MEB
FR	NACE 20	Arkema	7,300	FCE-CFDT; CFE-CGC Chimie; FNIC-CGT	France chimie	SEB/MEB
FR	NACE 21	Sanofi	25,000	FNIC-CGT; FCE-CFDT; CFE-CGC Chimie; CFTC CMTE; FO Pharmacie	LEEM	SEB/MEB
FR	NACE 22	Michelin	20,000	CFE-CGC Chimie; CFTC CMTE; FCE-CFDT; Fédéchimie FO; FNIC-CGT; Sud Chimie Pharma	SNPC	SEB/MEB
HR	NACE 20	Petrokemija	9%	Samostalni sindikat energetike, kemije i metala Hrvatske EKN; Local TU DEMOS HUS	HUP-UKI	SEB
HR	NACE 21	Pliva	7%	Novi sindikat Pliva NSP	HUP-UKI	SEB
HR	NACE 22	Gumiimpex-GRP	1%	n/a	n/a	n/a
HU	NACE 20	BorsodChem Private Limited Company	2,888	Chemical Workers Union of Kazincbarcika, member of VDSZ Pharma	Mavesz	SEB
HU	NACE 21	Richter Gedeon Chemical Factory PLC	6,095	VDSZ/Union of Pharmaceutical Factory Richter (Gyógyszergyári Szakszervezet), member of VDSZ Pharma, VDSZ	Magyos	MEB
HU	NACE 22	Hankook Tire Hungary Ltd	2,901	VDSZ (Rubber producers' Trade Union of Dunaújváros), member of Federation of Rubber Producers (GSZSZ), which is member of VDSZ	n/a	SEB
IE	NACE 20	Sigma-Aldrich	115	None	n/a	n/a
IE	NACE 21	Allergan	850	SIPTU; Connect	n/a	SEB
IE	NACE 22	Bridgestone	75	None	n/a	n/a
IT	NACE 20	BASF ITALIA S.P.A	110,000	Probably all representative trade unions	Federchimica	MEB
IT	NACE 21	Menarini Group	17,640	Probably all representative trade unions	Farindustria	MEB
IT	NACE 22	n/a	n/a	n/a	n/a	n/a
LT	NACE 20	Thermo Fisher Scientific Baltics, UAB	1,700	n/a	n/a	No CB
LT	NACE 21	Sicor Biotech/ Teva Baltics	190	n/a	n/a	No CB
LT	NACE 22	Rge Baltic	280	n/a	n/a	No CB

Representativeness of the European social partner organisations: Chemical sector

LU	NACE 20	Cosmolux International SA	190	OGB-L; LCGB	Not applicable	SEB
LU	NACE 21	n/a	n/a	n/a	n/a	n/a
LU	NACE 22	Goodyear SA	3,450	OGB-L; LCGB	Not applicable	SEB
LV	NACE 20	OLAINES ĶĪMISKĀ RŪPNĪCA "BIOLARS"	189	n/a	Laķīfa	n/a
LV	NACE 21	Olainfarm	1,070	LIA	Laķīfa	SEB
LV	NACE 22	HGF RĪGA	61	n/a	n/a	n/a
MT	NACE 20	Multigas	50	General Workers Union	MEA	SEB
MT	NACE 21	Actavis Ltd.	350	General Workers Union	MEA	SEB
MT	NACE 22	Trelleborg Sealing Solutions Malta	430	General Workers Union	MEA	SEB
NL	NACE 20	Huntsman Holland B.V.	64,000	FNV; CNV	AWVN	SEB
NL	NACE 21	Astellas B.V.	4,303	FNV	AWVN	SEB
NL	NACE 22	Apollo Vredestein B.V.	1,710	FNV; CNV	AWVN	SEB
PL	NACE 20	Grupa Azoty	15,625	Several trade unions (affiliated to NSZZ "Solidarność", OPZZ, FZZ or all-Poland occupational TUs)	PIPC	SEB
PL	NACE 21	Polpharma	4,150	Międzyzakładowy Związek Zawodowy "Chemików" przy Z.F. Polpharma S.A.; Komisja Międzyzakładowa NSZZ "Solidarność"	Polski Związek Pracodawców Przemysłu Farmaceutycznego; Business Centre Club; Konfederacja Lewiatan	SEB
PL	NACE 22	Michelin Poland	5,000	Komisja Międzyzakładowa NSZZ "Solidarność" Michelin Polska; Międzyzakładowy Związek Zawodowy Chemik przy Michelin Polska	Not affiliated	SEB for employees of Michelin Poland
PT	NACE 20	Corporação Industrial do Norte, S.A.	591	Fiequimetal; SINDEQ	APT	MEB
PT	NACE 21	Hovione	1,058	Fiequimetal; SINDEQ	APQUÍMICA	MEB
PT	NACE 22	Continental Mabor	1,993	Fiequimetal; SINDEQ	APIB	MEB
RO	NACE 20	CHIMCOMPLEX SA BORZESTI	2,039	Sindicatul 'Chimistul' Oltchim/member of FLE	Asociația Producătorilor și Distribuitorilor de Chimicale din România	SEB
RO	NACE 21	ANTIBIOTICE SA	1,415	Sindicatul Liber Independent Antibiotice	APMR	SEB
RO	NACE 22	MICHELIN ROMANIA S.A.	4,250	Sindicatul Banloc Floresti/Sindicatul Romsteel Cord Zalau/Sindicatul Anvelope Zalau, all affiliated to FLE	CCIFER	SEB
SE	NACE 20	Borealis	1,000	Probably all representative trade unions	IKEM	MEB
SE	NACE 21	Astra Zeneca	7,400	Probably all representative trade unions	IKEM	MEB
SE	NACE 22	Trioplast or Unopur	Trioplast, 1,000; Unopur, n.d.	Probably all representative trade unions	IKEM	MEB

Representativeness of the European social partner organisations: Chemical sector

SI	NACE 20	HELIOS, tovarna barv, lakov in umetnih smol Količevo, d.o.o.	803	Company TU KNG	GZS	SEB
SI	NACE 21	KRKA d.d.	5,870	TU KNG Krka Novo mesto and TU Krka	ZDS; GZS	SEB
SI	NACE 22	GOODYEAR SLOVENIA	1,600	TU KNG of Goodyear Slovenia; TU Independence KNSS of Goodyear Slovenia	ZDS	SEB
SK	NACE 20	Slovnaft, a.s. Bratislava	3,482 (2019)	ECHOZ	None	SEB
SK	NACE 21	Unomedical, s.r.o. Michalovce	955 (2019)	ECHOZ	None	SEB
SK	NACE 22	Continental Matador Rubber, s.r.o. Púchov	3,236 (2019)	ECHOZ	ZCHFP SR	SEB/MEB

Notes: CB, collective bargaining; MEB, multi-employer bargaining; n.d., no data available; SEB, single-employer bargaining. * For Germany, it is not possible to break down by subsector, as many chemical sector employers cover the whole sector. VCI reported that the three biggest German companies in 2020 were (1) Fresenius, with over 311,269 employees, (2) BASF, with 110,302 employees, and (3) Bayer, with 99,538 employees. All three companies are covered by MEB (union, IGBCE; EO, BAVC). All three companies are affiliated to a regional affiliate of BAVC.

Source: Network of Eurofound Correspondents' contributions to this study, 2021

Table A15 shows the proportions of the workforce covered by the largest companies in the chemical sector in each Member State, distinguishing between the largest companies (in terms of workforce) in each of the three chemical subsectors: NACE 20, NACE 21 and NACE 22.

Table A31: Proportion of the sectoral employment in the largest companies in the chemical sector in the EU27 in 2020

Member State	Number of people employed in the entire sector	% of sectoral workforce in largest company, NACE 20	% of sectoral workforce in second largest company, NACE 20	% of sectoral workforce in largest company, NACE 21	% of sectoral workforce in second largest company, NACE 21	% of sectoral workforce in largest company, NACE 22 (rubber)	% of sectoral workforce in second largest company, NACE 22 (plastics)	% of sectoral workforce in the six largest companies of the Member State
AT	70,800	2.8	1.4	7.1	7.1	1.0	0.5	19.9
BE	69,833	4.6	4.3	12.7	6.6	0.7	0.9	29.8
BG	52,125	1.9	1.0	3.6	1.9	5.4	0.9	14.7
CY	3,200	n.d.	1.5	26.6	n.d.	n.d.	6.3	34.4*
CZ	143,200	1.5	1.2	0.6	0.5	3.6	0.4	7.8
DE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
DK	55,650	2.2	1.2	31.8	n.d.	0.3	1.3	36.8
EE	9,700	4.3	3.1	n.d.	0.7	2.9	2.4	13.4*
EL	49,575	1.4	1.0	2.0	1.6	n.d.	4.0	10.0
ES	311,375	0.6	0.5	0.5	0.5	2.1	0.9	5.1
FI	32,525	2.8	2.4	8.2	2.9	2.7	2.9	21.9
FR	423,775	1.7	0.8	5.9	1.1	4.7	3.3	16.5
HR	24,175	9	4	7	n.d.	1	2	23.0*
HU	106,775	2.7	1.3	5.7	3.2	2.7	2.1	17.7
IE	57,275	0.2	0.1	1.5	0.9	0.1	0.4	2.8
IT	411,925	26.7	1.3	4.3	1.4	n.d.	0.0	33.7*
LT	15,450	11.0	7.8	1.2	0.8	1.8	2.8	25.4
LU	575	3.4	2.3	n.d.	0.0	n.d.	22.2	27.9
LV	8,782	2.1	2.0	12.2	9.9	0.7	2.2	29.1
MT	3,245	1.5	0.6	10.8	6.2	13.5	38.5	71.1
NL	98,525	65.0	0.0	4.4	4.1	1.7	23.1	98.3
PL	361,700	4.3	1.0	1.1	0.7	1.4	0.3	8.8
PT	57,075	1.0	0.8	1.9	1.2	3.5	1.0	9.4
RO	99,050	2.1	1.1	1.4	0.9	4.3	3.8	13.6
SE	45,000	2.2	n.d.	16.4	4.0	2.2	n.d.	24.8*
SI	43,300	1.9	1.9	13.6	11.8	3.7	0.4	33.3
SK	73,400	4.7	2.7	1.3	1.0	4.4	1.2	15.3

Notes: n.d., no data available; * proportion based on partial data available; company workforce data for Slovakia for 2019; total employment data in Latvia and Malta for 2021.

Source: Network of Eurofound Correspondents' contributions to this study, 2021

Annex 3. National-level chemical sector trade unions

Table A32: Abbreviations and names of trade unions in the chemical sector, 2021

Member State	Abbreviation in original language	Full name in original language	Full name in English
AT	PRO-GE	Produktionsgewerkschaft	Manufacturing Union
	GPA	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	Union of Private Sector Employees, Printing, Journalism, and Paper
BE	BBTK-SETCa	Bond van Bedienden Technici en Kaderleden – Syndicat des Employés, Techniciens et Cadres	Union of White-Collar Workers, Technicians, and Professional and Managerial Staff
	AC-CG	Algemene Centrale – Centrale Générale	General Federation
	ACV-CSC BIE	ACV (Algemeen Christelijk Vakverbond) Bouw Industrie en Energie	General Christian Trade Union Construction, Industry and Energy
	ACV-CSC CNE	(Confédération des syndicats chrétiens) Centrale Nationale des Employés	General Federation for White-Collar Workers
	ACVLB-CGSLB	Algemene Centrale der Liberale Vakbonden van België – Centrale Générale des Syndicats Libéraux de Belgique	General Federation of Liberal Trade Unions in Belgium
BG	НФТ “Химия и индустрия”	Национална федерация на труда “Химия и индустрия”	National Labour Federation ‘Chemistry and Industry’
	НФ „Химия” – КТ „Подкрепа”	Национална Федерация „Химия” - Конфедерация на труда „Подкрепа”	National Federation of Chemical Workers – Confederation of Labour Podkrepa
CY	ΣΕΒΕΤΤΥΚ-ΠΕΟ	Συντεχνία Εργατοϋπαλλήλων Βιομηχανίας, Εμπορίου, Τύπου-Τυπογραφείων και Γενικών Υπηρεσιών Κύπρου	Cyprus Industry, Commerce and Press-Printing Houses and General Services Trade Union
	ΟΒΙΕΚ-ΣΕΚ	Ομοσπονδία Βιομηχανικών Εργατοϋπαλλήλων Κύπρου	Cyprus Federation of Industrial Workers
	ΔΕΟΚ	Δημοκρατική Εργατική Ομοσπονδία Κύπρου	Democratic Labour Federation of Cyprus
CZ	OS ECHO	Odborový svaz ECHO	Trade Union of Chemical and Energy Workers
	ROSa	Regionální odborový svaz ROSa	Regional Trade Union ROSa
DE	IG BCE	Industriegewerkschaft Bergbau, Chemie, Energie	Mining, Chemical and Energy Industries Union
	CGBCE	Christliche Gewerkschaft Bergbau, Chemie, Energie	Christian Union of Mining, Chemical and Energy

Member State	Abbreviation in original language	Full name in original language	Full name in English
	VAA	Interessenvertretung für Fach- und Führungskräfte der chemisch-pharmazeutischen Industrie	Representation of Interests for Specialists and Executives in the Chemical-pharmaceutical Industry
DK	CO-industri	Centralorganisationen af Industriansatte i Danmark	Central Organisation of Industrial Employees
	IDA	Ingeniørforeningen	Danish Society of Engineers
EE	KAÜ	Keemikute Ametiühing	Chemists Trade Union
EL	OEXBE	Ομοσπονδία Εργατοϋπαλλήλων Χημικής Βιομηχανίας Ελλάδας	Greek Federation of Workers in the Chemical Industry
	ΟΕΦΣΕΕ/ ΟΕΦΣΕΕ	Ομοσπονδία Εργαζομένων Φαρμακευτικών & Συναφών Επαγγελμάτων Ελλάδας	Federation of Workers in Pharmaceutical & Related Professions of Greece
	PEF/ΠΟΕ	Πανελλήνια Ομοσπονδία Ενέργειας	Panhellenic Energy Federation
ES	CCOO Industria	Comisiones Obreras – Industria	Working Commissions – Industry
	UGT-FICA	Unión General de Trabajadores – Federación de Industria, Construcción y Agro	General Union of Workers – Federation of Industry, Construction and Agriculture
	ELA	Eusko Langileen Alkartasuna – Industria eta Eraikuntza	Basque Workers Solidarity – Industry and Construction
	FI-USO	Federación de Industria – Unión Sindical Obrera	Industrial Federation – Working Trade Union
	FESIQ-CGT	Federación Estatal de Sindicatos de las Industrias Químicas – Confederación General de Trabajadores	State Federation of Unions of the Chemical Industries – General Confederation of Workers
FI	n/a	Sähköliitto	Finnish Electrical Workers' Union
	IL	Insinööriliitto	The Union of Professional Engineers
	TEK	Tekniikan Akateemiset	Academic Engineers and Architects in Finland
	YTN	Ylemmät toimihenkilöt	The Federation of Professional and Managerial Staff
	n/a	Teollisuusliitto	Finnish Industrial Union
	Pro	Ammattiliitto Pro ry	Trade Union Pro
FR	CFE-CGC Chimie	CFE-CGC Chimie	Chemical Federation CFE-CGC
	CFTC-CMTE	Fédération CFTC Chimie Mines Textile Energie	Federation Mining-Textile-Energy-CFTC
	Fédéchimie FO	Fédéchimie FO	Fédéchimie FO
	FO Pharmacie	Fédération FO des métiers de la Pharmacie, LBM, Cuir et Habillement	FO Pharma-Leather-Clothing
	FCE-CFDT	Fédération Chimie Energie CFDT	Federation Chemical Energy CFDT
	FNIC-CGT	Fédération Nationale des Industries Chimiques CGT	National Federation of Chemical Industries – CGT
	FNTE-CGT	Fédération nationale des travailleurs de l'État	National Federation of State Employees – CGT

Member State	Abbreviation in original language	Full name in original language	Full name in English
	UNSA Industrie et Construction	Fédération UNSA Industrie & Construction	UNSA Industry and Construction
	SUD Chimie Pharma	SUD Chimie Pharma	SUD Chemical Pharmaceutical
HR	EKN	Samostalni sindikat energetike, kemije i nemetala Hrvatske	Autonomous Trade Union in Power Industry, Chemistry and Non-Metal Industry Croatia
	SING	Sindikata naftnog gospodarstva	Oil Economy Trade Union
	NSP	Novi sindikat Plive	New Trade Union Pliva
HU	VDSZ	Magyar Vegyipari, Energiaipari és Rokon Szakmákban Dolgozók Szakszervezeti Szövetsége	Federation of Trade Unions of the Chemical, Energy & Allied Workers
	VDSZ Pharma	VDSZ Gyógyszeripari Szakszervezeti Szövetség	Federation of Trade Unions of Pharmaceutical industry at VDSZ
IE	SIPTU	Services Industry Professional Technical Union	Services Industry Professional Technical Union
	Connect	Connect Trade Union	Connect Trade Union
IT	FILCTEM CGIL	Federazione Italiana Lavoratori della Chimica, del Tessile Energia Manifatture	Italian Federation of Chemical, Textile, Energy and Manufacturing Workers
	FEMCA CISL	Federazione Energia, Moda, Chimica e Affini	Federation of Energy, Fashion, Chemistry and Related Workers
	UILTEC UIL	Unione Italiana Lavoratori Tessile, Energia, Chimica	Italian Union of Textile, Energy and Chemical Workers
LT	LPPSF	Lietuvos pramonės profesinių sąjungų federacija	Lithuanian Federation of Industrial Trade Unions
	LPS "Solidarumas"	Lietuvos pramonės įmonių profesinė sąjunga "Solidarumas"	Trade Union 'Solidarumas' of Lithuanian Industrial Workers
LU	OGB-L	Syndicat bois, caoutchouc, céramique, chimie, ciment, papier, plastique, textiles et verre de l'OGB-L	Wood, Rubber, Ceramics, Chemicals, Cement, Paper, Plastic, Textiles and Glass Union of the OGB-L
	LCGB-INDUSID	LCGB Industrie et sidérurgie	LCGB Industry and Steel Industry
LV	LIA	Latvijas Industriālo nozaru arodbiedrība	Latvian Industrial Workers Trade Union
MT	GWU	General Workers Union	General Workers Union
NL	FNV	Federatie Nederlandse Vakbeweging	Netherlands Trade Union Confederation
	De Unie	De Unie	The Union
	CNV	Christelijk Nationaal Vakverbond	Christian National Trade Union Federation
PL	SPCH NSZZ "Solidarność"	Sekretariat Przemysłu Chemicznego Niezależnego Samorządnego Związku Zawodowego "Solidarność"	Secretariat of Chemical Industry of the Independent Self-Governing Trade Union 'Solidarity'

Member State	Abbreviation in original language	Full name in original language	Full name in English
	PZZ "Kadra"	Porozumienie Związków Zawodowych „KADRA"	Trade Unions Alliance 'Kadra'
	ZZIT	Związek Zawodowy Inżynierów i Techników	Trade Union of Engineers and Technicians
	OZZZPRC	Ogólnokrajowe Zrzeszenie Związków Zawodowych Pracowników Ruchu Ciągłego	Nationwide Alliance of Trade Unions of Continuous Process Industry Employees
	FZZPChSziC	Federacja Związków Zawodowych Pracowników Przemysłu Chemicznego, Szklarskiego i Ceramicznego w Polsce	Trade Union Federation of Chemical, Glass and Ceramic Industries in Poland
PT	Fiequimetal	Federação Intersindical das Indústrias Metalúrgicas, Químicas, Eléctricas, Farmacêutica, Celulose, Papel, Gráfica, Imprensa, Energia e Minas	Interunion Federation of Metal, Chemical, Electric, Pharmaceutical, Pulp, Paper, Printing, Press, Energy and Mining Industries
	SINDEQ	Sindicato das Indústrias e Afins	Union of Industries and Related
	SIMA	Sindicato das Indústrias Metalúrgicas e Afins	Union of Metal and Related Industries
	COFESINT	Federação de Sindicatos da Indústria, Energia e Transportes	Federation of Trade Unions in Industry, Energy and Transport
	SITESE	Sindicato dos Trabalhadores e Técnicos de Serviços, Comércio, Restauração e Turismo	Trade Union of Service, Commerce, Restaurant and Tourism Workers and Technicians
	SITEMAQ	Sindicato da Marinha Mercante, Indústrias e Energia	Merchant Marine, Industry and Energy Union
	FE	Federação dos Engenheiros	Federation of Engineers
RO	FSLCP	Federația Sindicatelor Libere din Chimie și Petrochimie	Federation of Unions from Chemistry and Petrochemistry
	FLE	Federația Națională a Sindicatelor din Chimie-Petrochimie "LAZĂR EDELEANU"	National Federation of Chemical and Petrochemical Trade Unions 'LAZAR EDELEANU'
SE	IF Metall	IF Metall	Swedish Metal Workers' Union
	Unionen	Unionen	n/a
	SI	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
	Naturvetarna	Naturvetarna	Swedish Association of Professional Scientists
	Ledarna	Ledarna	Ledarna
SI	ZSSS-KNG	Zveza svobodnih sindikatov Slovenije - Sindikat kemične, nekovinske in gumarske industrije Slovenije	Association of Free Trade Unions of Slovenia – Trade Union of Chemical, Non-metallic and Rubber Industry of Slovenia
	SKGIPS-KS-90	Sindikat delavcev kemijske, gumarske industrije in industrije plastičnih mas Slovenije	Trade Union of Chemical, Rubber and Plastic Industry Workers of Slovenia

Member State	Abbreviation in original language	Full name in original language	Full name in English
	KNSS	Neodvisnost KNSS – Sindikat kemijske in farmacevtske dejavnosti Slovenije	Independence KNSS – Trade Union of Chemical and Pharmaceutical industry of Slovenia
	KSS Pergam	Konfederacija sindikatov Slovenije (KSS) – Pergam	Confederation of Trade Unions of Slovenia Pergam
SK	ECHOZ	Energeticko-chemický odborový zväz	Energy-Chemical Trade Union Association
	AZCHFP SR	Asociácia zamestnancov chemickeho a farmaceutickeho priemyslu SR	Association of Employees in Chemical and Pharmaceutical Industry of the Slovak Republic

Representativeness of the European social partner organisations: Chemical sector

Table A33: Sector-relatedness of national chemical sector trade unions

Member State	Abbreviation	NACE (Rev. 2)											Other sectors outside the chemical sector demarcation						Domain coverage pattern*	Types of workers the trade union organises						Trade union organises workers by company size (number of employees)				Trade union covers entire country			
		20.1	21	22.1	22.2	Plastic packaging	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Metal	Construction	Energy	Automotive	Extractive		Commerce	Others	Self-employed	Subcontractors	Blue-collar	White-collar	Lab workers	R&D	Management	1-9		10-49	50-249	250+
EU27	TOTAL Trade Unions (TU): 81	66	67	65	64	58	39	58	63	58	57	51	30	37	27	54	33	40	30	55	SO: 52, O: 21, S: 6	21	51	69	75	55	47	54	59	69	75	77	78
EU27	TOTAL MSs with a TU	24	25	23	24	21	15	21	24	22	20	22	9	17	13	23	16	17	17	21		8	17	27	27	23	20	21	18	23	26	26	27
AT	PRO-GE																			Several production and manufacturing sectors	0												
AT	GPA																			White-collar in private sector industry, journalists	0												
BE	BBTK-SETCa																		No	0													
BE	AC-CG																		No	0													
BE	ACV-CSC BIE																		No	0													
BE	ACV-CSC CNE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a												No, only French-speaking
BE	ACVLB-CGSLB	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a												
BG	НФТ Химия и индустрия																		No	S													
BG	НФ Химия – КТ Подкрепа																		No	S													
CY	ΣΕΒΕΤΤΥΚ-ΠΕΟ																		Industry, commerce, press, printing houses, etc.	SO													
CY	ΟΒΙΕΚ-ΣΕΚ																		Industry, commerce, press, printing houses, etc.	SO													

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	NACE (Rev. 2)													Other sectors outside the chemical sector demarcation						Domain coverage pattern*	Types of workers the trade union organises							Trade union organises workers by company size (number of employees)				Trade union covers entire country		
		20.1	21	22.1	22.2	Plastic packaging	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Metal	Construction	Energy	Automotive	Extractive	Commerce	Others		Self-employed	Subcontractors	Blue-collar	White-collar	Lab workers	R&D	Management	1-9	10-49	50-249	250+			
		CY	DEOK																																
CZ	OS ECHO																				Heating	SO													
CZ	ROSa																				Municipal police, bakers, drivers	SO													
DE	IG BCE																				Leather, brown coal, hard coal, refurbishment, glass, ceramics, paper, minerals, oil, cement, lime	SO													
DE	VAA																					SO													
DE	CGBCE																					SO													
DK	CO-industri																				Skilled and unskilled in most sectors, glass, steel cement	SO													
DK	IDA																				Engineers in many sectors	SO													
EE	KAÜ																				Oil shale activities	SO													
EL	OEXBE																				No	SO													
EL	OEΦΣEE																				No	S													n/a
EL	PEF/ΠOΕ																				Refineries	SO													
ES	CCOO Industria																				Aerospace, agriculture defence, ICT, textiles, all sectors	SO													
ES	UGT-FICA																				All sectors	SO													

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	NACE (Rev. 2)											Other sectors outside the chemical sector demarcation						Domain coverage pattern*	Types of workers the trade union organises						Trade union organises workers by company size (number of employees)				Trade union covers entire country						
		20.1	21	22.1	22.2	Plastic packaging	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Metal	Construction	Energy	Automotive	Extractive		Commerce	Others	Self-employed	Subcontractors	Blue-collar	White-collar	Lab workers	R&D	Management	1-9		10-49	50-249	250+			
ES	ELA																		All industrial activities	SO																No, only Basque Country and Navarre
ES	FI-USO																		No	SO																
ES	FESIQ-CGT																		No	S									n/a	n/a	n/a	n/a	n/a			
FI	Sähköliitto																		Wide range of sectors: food, ICT, paper, etc.	O																
FI	IL																		No	O																
FI	TEK																		No	O																
FI	Teollisuusliitto																		Technology industry, woodwork and others	SO					n/a	n/a										
FI	Pro																		No	SO																
FI	TEK																		No	O																
FR	CFE-CGC Chimie																		Glass, ceramic, textile clothing, writing instruments	SO																
FR	CFTC-CMTE																		Textile clothing	O																
FR	Fédéchimie FO																		Glass, leather, recreational boats	O																
FR	FCE-CFDT																		Glass, pulp and paper, oil	SO																
FR	FNIC-CGT																		Writing instruments, medical, biological labs, medical, technical,	O																

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	NACE (Rev. 2)											Other sectors outside the chemical sector demarcation						Domain coverage pattern*	Types of workers the trade union organises							Trade union organises workers by company size (number of employees)				Trade union covers entire country		
		20.1	21	22.1	22.2	Plastic packaging	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Metal	Construction	Energy	Automotive	Extractive		Commerce	Others	Self-employed	Subcontractors	Blue-collar	White-collar	Lab workers	R&D	Management	1-9	10-49		50-249	250+
																			trade, pharmacies, distribution, petrol, oil														
FR	FNTE-CGT																																
FR	FO Pharmacie																		Leather, clothing	SO													
FR	UNSA Industrie et Construction																		Waste, pharmacies, petrol, oil, utilities, glass, pulp and paper, printing	SO													
FR	SUD Chimie Pharma																		No	S													
HR	EKN																		Non-metal Industry	SO													
HR	SING																		Production of oil and gas	SO													
HR	NSP																		Process engineering, manufacture of process equipment	SO													
HU	VDSZ																		Vocational training	O													
HU	VDSZ Pharma																		No	S													
IE	SIPTU																		No	SO													
IE	Connect																		No	SO													
IT	FILCTEM CGIL																		No	O													
IT	FEMCA CISL																		No	O													
IT	UILTEC UIL																		No	O													
LT	LPPSF																		Transport, wholesale, storage, refined petroleum,	SO													

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	NACE (Rev. 2)											Other sectors outside the chemical sector demarcation						Domain coverage pattern*	Types of workers the trade union organises							Trade union organises workers by company size (number of employees)				Trade union covers entire country					
		20.1	21	22.1	22.2	Plastic packaging	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Metal	Construction	Energy	Automotive	Extractive		Commerce	Others	Self-employed	Subcontractors	Blue-collar	White-collar	Lab workers	R&D	Management	1-9	10-49		50-249	250+			
																			municipal services and water	SO																
LT	LP PS																		Textile and sewing	SO																
LU	OGB-L																		Rubber, ceramics, cement, plastic, textiles, glass	SO																
LU	LCGB-INDUSID																		Industry in general	SO																
LV	LIA																		Food, textile	SO																
MT	GWU																		Services, financial services, transport, hospitality	SO																
NL	FNV																		Almost all sectors	SO																
NL	CNV																		Almost all sectors	SO																
NL	De Unie																		Active in all sectors	SO	n/a	n/a	n/a	n/a	n/a	n/a	n/a									
PL	SPCH NSZZ "Solidarność"																		Paper, paper products	SO																
PL	PZZ "Kadra"																		Water supply, sewage, waste management, healthcare	SO																
PL	ZZIT																		Telecoms, spacecraft machinery, military vehicles	SO																
PL	OZZZPRC																		Paper production, water supply	SO																
PL	FZZPChSziC																		Glass, ceramics, paper	SO																

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	NACE (Rev. 2)											Other sectors outside the chemical sector demarcation						Domain coverage pattern*	Types of workers the trade union organises							Trade union organises workers by company size (number of employees)				Trade union covers entire country			
		20.1	21	22.1	22.2	Plastic packaging	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Metal	Construction	Energy	Automotive	Extractive		Commerce	Others	Self-employed	Subcontractors	Blue-collar	White-collar	Lab workers	R&D	Management	1-9	10-49		50-249	250+	
PT	Fiequimetal																		Pulp, paper, printing, press	SO														
PT	SINDEQ																		Textiles, shoe manufacture	SO														
PT	SIMA																		All manufacture	SO														
PT	COFESINT																		Sea transport, pulp, paper, water supply, forestry, glass, cement, tobacco	SO														
PT	SITese																		Service workers in all sectors	SO														
PT	SITEMAQ																		Maritime transport	SO														
PT	FE																		All economic activities	SO														
RO	FSLCP																		Cleaning	SO														
RO	FLE																		Petrochemicals	SO														
SE	IF Metall																		No	O														
SE	Unionen																		White-collar in private sector	O														
SE	SI																		Engineers in all sectors	O														
SE	Naturvetarna																		Professional scientists in all sectors	O														
SE	Ledarna																		Management in all sectors	O														

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	NACE (Rev. 2)											Other sectors outside the chemical sector demarcation						Domain coverage pattern*	Types of workers the trade union organises							Trade union organises workers by company size (number of employees)				Trade union covers entire country		
		20.1	21	22.1	22.2	Plastic packaging	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Metal	Construction	Energy	Automotive	Extractive		Commerce	Others	Self-employed	Subcontractors	Blue-collar	White-collar	Lab workers	R&D	Management	1-9	10-49		50-249	250+
SI	ZSSS-KNG ¹¹																		No	SO													
SI	KSS Pergam																																
SI	SKGIPS-KS-90																		No	SO													
SI	KNSS																		No	SO													
SK	AZCHFP SR																		R&D organisations, labs	SO													
SK	ECHOZ																		R&D in chemical technologies	SO													

Notes: * Membership domain pattern in relation to the sector: C, congruence; O, overlap; S, sectionalism; SO, sectionalism overlap. Cells shaded in green indicate 'YES'. The trade unions shaded in orange are not affiliated to IndustriAll Europe. ICT, information and communications technology.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹¹ ZSSS-KNG is not directly affiliated to IndustriAll Europe. It is a member of ZSSS at national level, and as such indirectly represented in IndustriAll Europe.

Table A34: Trade union membership strength

Member State	Abbreviation	Members in chemical sector (number)	Members in chemical sector (%)	This number is...				Membership trend (2–3 years)	Size ranking in sector	National sectoral workforce	National sectoral trade union density (%)
				Exact number from DB	Estimate – DB is not sector specific	Estimate – DB is kept regionally	Estimate – trade union does not disclose				
EU27	86 trade unions in 27 Member States			Yes: 32	Yes: 19	Yes: 2	Yes: 10	Increased: 14 Stable: 23 Decreased: 20 n/a: 29	1st largest: 27 2nd largest: 22 3rd largest: 6		
AT	PRO-GE	12,000	15	Yes				Stable	1st	73,200	15
AT	GPA	n/a	n/a				Yes	Increased	2nd		
BE	BBTK-SETCa	28,500 ¹²	26		Yes			n/a	2nd	109,700	53
BE	AC-CG			n/a	n/a	n/a	n/a	n/a	2nd		
BE	ACV-CSC BIE ¹³	30,036	27	Yes				n/a	1st		
BE	ACV-CSC CNE	n/a	n/a	Yes				n/a	Smallest		
BE	ACVLB-CGSLB	n/a	n/a	Yes				n/a	Second smallest		
BG	НФТ „Химия и индустрия”	2,665	5	n/a	n/a	n/a	n/a	Decreased	1st	53,300	10
BG	НФ „Химия” – КТ„Подкрепа”	2,665	5	n/a	n/a	n/a	n/a	Decreased	2nd		
CY	ΣΕΒΕΤΥΚ-ΠΕΟ	277	7	n/a	n/a	n/a	n/a	Stable	2nd	4,200	42
CY	ΟΒΙΕΚ-ΣΕΚ	1,221	29	Yes				Increased	1st		
CY	ΔΕΟΚ (no CB)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a		
CZ	OS ECHO	28,600	20		Yes			Decreased	1st	143,000	35
CZ	ROSa	21,450	15		Yes			Stable	2nd		
DE	IG BCE	600,000	67	Yes				Stable	1st	887,200	71
DE	VAA (member of FECCIA)										
DE	CGBCE (member of CESI)	~3,000		Yes				n/a	n/a		
DK	CO-industri	11,000	20	Yes				Stable	1st	55,700	29
DK	IDA	5,185	~9	Yes				n/a	For engineers		
EE	KAÜ	270	3		Yes			Decreased	1st (the only one)	8,100	3
EL	ΟΕΧΒΕ (chemical industry)	6,000	12		Yes			Decreased	1st	48,200	20
EL	ΟΕΦΣΕΕ/OEFSEE (pharma)	4,000	8		Yes			n/a	2nd		

¹² Both trade unions, BBTK-SETCa and ACCG together, reported a common sectoral membership of 28,500 trade union members. It was not clarified which of the two has more members in the sector, so it is not clear which one is the second largest sectoral trade union. There are twice as many white-collar employees in the sector (SETCa organises white-collar workers) as blue-collar workers, although the density rate is expected to be higher among the blue-collar workers organised by ACCG.

¹³ In the previous representativeness study, ACV PULS also had members in the sector. However, it has transferred them to ACV BIE and has no members in the sector.

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Members in chemical sector (number)	Members in chemical sector (%)	This number is...				Membership trend (2–3 years)	Size ranking in sector	National sectoral workforce	National sectoral trade union density (%)
				Exact number from DB	Estimate – DB is not sector specific	Estimate – DB is kept regionally	Estimate – trade union does not disclose				
EL	PEF/ΠΟΕ	200	1		Yes			Stable	Not one of 3 largest		
ES	CCOO Industria	18,916	40		Yes			Increased	1st	303,700	~15
ES	UGT-FICA	15,200	35	Yes				Stable	2nd		
ES	ELA	2,668	1		Yes			Increased	Largest in Basque Country, one of smallest nationally		
ES	FI-USO	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a		
ES	FESIQ-CGT	3,000	1		Yes			n/a	n/a		
FI	Sähköliitto	200	1	Yes				n/a	Not one of 3 largest	28,200	92
FI	IL	1,800	6	Yes				Stable	4th		
FI	TEK	2,500	9	Yes				Increased	3rd		
FI	Teollisuusliitto	15,000	53	Yes				n/a	1st		
FI	Pro	6,400	23	Yes				Decreased	2nd		
FI	YTN (affiliated indirectly via IL and TEK)	8,000	28		Yes			Increased	n/a (YTN-affiliated TEK and IL are 3rd and 4th largest in sector)		
FR	CFE-CGC Chimie	7,300	1.8		Yes			Stable	3rd		
FR	CFTC-CMTE	~2,350	n/a	Yes	Yes			Stable	5th		
FR	Fédéchimie FO	~5,000	n/a	Yes				n/a	4th		
FR	FCE-CFDT	40,000	10		Yes			n/a	1st		
FR	FNIC-CGT	~10,000	n/a	Yes				n/a	2nd		
FR	FNTE-CGT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a		
FR	FO Pharmacie	n/a	n/a	n/a	n/a	n/a	n/a	n/a	5th largest in pharmaceutical sector		
FR	UNSA Industrie et Construction	n/a	n/a	n/a	n/a	n/a	n/a	n/a	5th or 6th largest		
FR	SUD Chimie Pharma	~1,300–1,400	0.3					Increased	7th largest		
HR	EKN ¹⁴	2,700	9	n/a	n/a	n/a	n/a	Decreased	1st	29,500	11
HR	SING	50	0.2	n/a	n/a	n/a	n/a	Decreased	Small in the chemical sector, main sector is oil		
HR	NSP	420	1.5	n/a	n/a	n/a	n/a	Decreased	2nd		

¹⁴ EKN is indirectly affiliated to IndustriAll Europe, through its membership of Savez samostalnih sindikata – SSSH (The Union of Autonomous Trade Unions of Croatia – UATUC) at national level.

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Members in chemical sector (number)	Members in chemical sector (%)	This number is...				Membership trend (2–3 years)	Size ranking in sector	National sectoral workforce	National sectoral trade union density (%)
				Exact number from DB	Estimate – DB is not sector specific	Estimate – DB is kept regionally	Estimate – trade union does not disclose				
HU	VDSZ	20,100	17	No	No	No	No	Decreased	1st	121,000	24
HU	VDSZ Pharma	8,736	7		Yes			Increased	2nd		
IE	SIPTU	>5,000	8.5	Yes				Stable	1st	59,100	10.5
IE	Connect	~1,000	2	n/a	n/a	n/a	n/a	Stable	2nd		
IT	FILCTEM CGIL	216,000	50	n/a	n/a	n/a	n/a	Stable	1st	425,300	67
IT	FEMCA CISL	58,000	14		Yes			Stable	2nd		
IT	UILTEC UIL	~10,000		Yes				Stable	3rd		
LT	LPPSF	960	6				Yes	Increased	1st	16,200	7
LT	LPS "Solidarumas"	140	1				Yes	Stable	2nd		
LU	OGB-L	1,200	60	No	No	No	No	Increased	1st	2,000	100
LU	LCGB-INDUSID	800	40	No	No	No	No	Stable	2nd		
LV	LIA	80	1	Yes				Decreased	1st	8,100	1
MT	GWU	3,400	89		Yes			Stable	1st	3,800	89
NL	FNV	40,000	20	Yes				Decreased	1st	100,600	30
NL	CNV	20,000	10				Yes	Stable	2nd		
NL	De Unie	~5,000		Yes			Yes	n/a	n/a		
PL	SPCH NSZZ "Solidarność"	10,469	3	n/a	n/a	n/a	n/a	Decreased	1st	370,500	4
PL	PZZ "Kadra"	500	0.1				Yes	Increased	Not one of 3 largest		
PL	ZZIT	n/a	n/a	Yes				n/a	n/a		
PL	OZZZPRC	2,200	0.6			Yes		Increased	n/a		
PL	FZZPChSziC	n/a	n/a					Decreased	n/a		
PT	Fiequimetal	4,000	8				Yes	n/a	1st	53,100	16
PT	SINDEQ	3,500	7	n/a	n/a	n/a	n/a	Increased	2nd		
PT	SIMA	<100	0.2				Yes	Stable	Small		
PT	COFESINT	n/a	n/a		Yes			Decreased	Not applicable: trade union federation, does not organise workers directly		
PT	SITese	n/a	n/a				Yes	n/a	Small, with fewer than 100 members		
PT	SITEMAQ	<100	0.2	n/a	n/a	n/a	n/a	n/a	Small		
PT	FE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	No, federation of very small professional unions		
RO	FSLCP	7,140	7.5	n/a	n/a	n/a	n/a	Decreased	1st	96,100	10

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Members in chemical sector (number)	Members in chemical sector (%)	This number is...				Membership trend (2–3 years)	Size ranking in sector	National sectoral workforce	National sectoral trade union density (%)
				Exact number from DB	Estimate – DB is not sector specific	Estimate – DB is kept regionally	Estimate – trade union does not disclose				
RO	FLE ¹⁵	2,300	2.5				Yes	Decreased	2nd		
SE	IF Metall	3,748	8	n/a	n/a	n/a	n/a	Stable	3rd	48,200	41
SE	Unionen	10,517	22	Yes				n/a	1st (IF Metall disagrees)		
SE	SI	4,519	9	Yes				Increased	2nd		
SE	Naturvetarna	~500		Yes				n/a	3rd or 4th		
SE	Ledarna	~500		Yes				n/a	Smallest		
SI	ZSSS-KNG ¹⁶	12,425	35	Yes				Decreased	1st	35,000	58
SI	SKGIPS-KS-90	3,550	~10		Yes	Yes		Stable	2nd		
SI	KNSS	3,550	~10	Yes				Stable	3rd		
SI	KSS Pergam	630	n/a	n/a	n/a	n/a	n/a	n/a	4th		
SK	AZCHFP SR	660	1	Yes				Decreased	2nd	60,700	15
SK	ECHOZ	8,700	14	Yes				Decreased	1st		

Notes: Information on number of members available for 51 out of 79 trade unions. The organisations marked in orange are those that are not affiliated to IndustriAll Europe. The cells highlighted in green show the first and second largest trade union in the Member State. CB, collective bargaining; DB, database; n/a, no information available.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹⁵ FLE is a member of UFS Atlas. Both FLE and UFS Atlas are affiliated to IndustriAll Europe. FLE has sectoral workers affiliated directly, and UFS Atlas indirectly (only through FLE). Therefore, UFS Atlas is not included. SN Petrom is also a member of IndustriAll Europe, but has no members in the chemical sector, so it is not included here.

¹⁶ ZSSS-KNG is not directly affiliated to IndustriAll Europe. It is a member of ZSSS at national level, and as such indirectly represented in IndustriAll Europe.

Representativeness of the European social partner organisations: Chemical sector

Table A35: Situation of national sectoral trade unions in the industrial relations landscape of the country

Member State	Abbreviation	Representative (Yes/No)	Legal requirement or mutual recognition	% of elected employee representatives	Involved in bi- or tripartite SD for chemical sector	Involved in paritarian organisation(s)	Number of TU employees	Consulted by government	Involved in sector-level CB	Involved in company-level CB	% of national sector workforce covered by CB of this TU	Involved in industrial action	Affiliation to cross-industry national TU
EU27	TOTALS for 86 TUs	Yes: 74 No: 4 n/a: 8	LR: 34 MR: 34 Both: 7 n/a: 10 not applicable: 1		Yes: 54 No: 20 n/a: 9	Yes: 30 No: 43 n/a: 9		Yes: 42 No: 24 n/a: 15	Yes: 49 No: 31 n/a: 4	Yes: 61 No: 18 n/a: 5		Yes: 37 No: 27n/a: 21	Yes: 72 No: 3 n/a: 11
MSs with TU		27			21	11		20	15	22		15	25
MSs without TU		0			6 (CY, EE, IE, IT, LT, LU)	16 (AT, BG, CY, CZ, EE, EL, HR, IE, LT, LU, MT, PL, PT, SE, SI, SK)		7 (BG, IE, HR, LT, LU, HU, RO)	12 (BG, CY, EE, IE, HR, LT, LU, LV, MT, NL, PL, RO)	5 (AT, BG, CZ, EE, FI)		12 (CY, CZ, DE, DK, EE, HR, IT, LT, LU, LV, MT, SE)	2 MSs responded n/a (MT and NL)
AT	PRO-GE		LR, MR	60	Both	No	230	Ad hoc		No	50		ÖGB
AT	GPA		LR, MR	40	Both	No	n/a	No		No	50		ÖGB
BE	BBTK-SETCa		LR, MR	34 of white-collar (2016)			n/a	Regularly		No	100		ABVV-F GTB
BE	AC-CG		LR, MR	46 of blue-collar			n/a	Regularly			100		n/a
BE	ACV-CSC BIE		LR, MR	45 of blue-collar			190	Regularly			100		ACV-CSC
BE	ACV-CSC CNE		LR, MR	Yes, % n/a			120	Regularly			100	n/a	n/a
BE	ACVLB-CGSLB		LR, MR	Yes, % n/a			n/a	Regularly			100		ACVLB-C GSLB
BG	НФТ "Химия и индустрия"		LR	Yes, % n/a		No	3	No	No	No	16		CITUB
BG	НФ „Химия“ – КТ Подкрепа		LR	Yes, % n/a		No	n/a	No	No	No	16	No	CL Podkrepa

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Representative (Yes/No)	Legal requirement or mutual recognition	% of elected employee representatives	Involved in bi- or tripartite SD for chemical sector	Involved in paritarian organisation(s)	Number of TU employees	Consulted by government	Involved in sector-level CB	Involved in company-level CB	% of national sector workforce covered by CB of this TU	Involved in industrial action	Affiliation to cross-industry national TU
CY	ΣΕΒΕΤΤΥΚ-ΠΕΟ		MR	Yes, % n/a	No	No	8	No	No		66	No	PEO
CY	DEOK	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
CY	ΟΒΙΕΚ-ΣΕΚ		MR	3.3	No	No	11	Ad hoc	No		66	No	SEK
CZ	OS ECHO		MR	No		No	8	Ad hoc		No	35	No	ČMKOS
CZ	ROSa		MR	No		No	2	No	No	No	4	No	ASO ČR
DE	IG BCE		MR	Supposedly over 80	Ad hoc		877	Ad hoc			68	Sees no need for it	DGB
DE	VAA												
DE	CGBCE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
DK	CO-industri		MR	Yes, % n/a			35	Regularly		No	n/a; majority covered by 2 agreements negotiated by CO-industri	No	TU is the cross-industry national TU
DK	IDA		MR	Yes, % n/a	No	No	250	Ad hoc	No		Covered by company agreements	No	Akademikerne
EE	KAÜ	n/a	n/a	Yes, % n/a	No	No	4	Regularly	No	No	n/a	No	Estonian TU Confederation
EL	ΟΕΧΒΕ		MR	7	Bipartite	No	1	Ad hoc			100		GSEE
EL	ΟΕΦΣΕΕ/ΟΕΦΣΕΕ		MR	Yes, % n/a	Bipartite	No	n/a	No		n/a	n/a		n/a
EL	ΠΕΦ/ΠΟΕ	No	n/a	n/a	No	No	n/a	n/a	No	No	n/a	n/a	GSEE
ES	CCOO Industria		LR	55			n/a	Regularly			100		CCOO
ES	UGT-FICA		LR	45			n/a	Regularly			100		UGT
ES	ELA		LR	Yes, % n/a	No	No	70	No	No		5		ELA
ES	FI-USO	n/a	n/a	Yes, % n/a	n/a	n/a	n/a	n/a	No		5		USO
ES	FESIQ-CGT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	No		n/a		n/a
FI	Sähköliitto		MR	<5	n/a	n/a	30	n/a		No	<1	n/a	SAK

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Representative (Yes/No)	Legal requirement or mutual recognition	% of elected employee representatives	Involved in bi- or tripartite SD for chemical sector	Involved in paritarian organisation(s)	Number of TU employees	Consulted by government	Involved in sector-level CB	Involved in company-level CB	% of national sector workforce covered by CB of this TU	Involved in industrial action	Affiliation to cross-industry national TU
FI	IL		MR	Yes, % n/a			62	Ad hoc	Via YTN	No	4	No	Akava
FI	TEK		MR	Yes, % n/a			120	Ad hoc via YTN	Via YTN	No	9	No	Akava
FI	Teosuusliitto		MR	50			150–200	Regularly		No	60		SAK
FI	Pro		MR	30			150	Ad hoc		No	25		STTK
FI	TEK		MR	Yes, % n/a			120	Ad hoc	Via YTN	No	9	No	Akava
FR	CFE-CGC Chimie		LR	Yes, % n/a			5	Ad hoc			100		CFE-CGC
FR	CFTC-CMTE		LR	Yes, % n/a			n/a	No			23	n/a; no answer	CFTC
FR	Fédéchimie FO		LR	Yes, % n/a			n/a	n/a			77		CGT-FO
FR	FCE-CFDT		LR	Yes, % n/a			n/a	n/a			100		CFDT
FR	FNIC-CGT		LR	Yes, % n/a			n/a	n/a			100		CGT
FR	FNTE-CGT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	CGT
FR	FO Pharmacie		LR	Yes, % n/a			n/a	n/a			23		CGT-FO
FR	UNSA Industrie et Construction		LR	Yes, % n/a			n/a	No			23	n/a	UNSA
FR	SUD Chimie Pharma		Not applicable	Less than 8% threshold for branch representation	No	No	1	No		In some companies	n/a		Solidaires
HR	EKN		LR	25		No	4	No	No		70	No	SSSH
HR	SING	No	LR	No	No	No	3	No	No	No	0	No	NHS

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Representative (Yes/No)	Legal requirement or mutual recognition	% of elected employee representatives	Involved in bi- or tripartite SD for chemical sector	Involved in paritarian organisation(s)	Number of TU employees	Consulted by government	Involved in sector-level CB	Involved in company-level CB	% of national sector workforce covered by CB of this TU	Involved in industrial action	Affiliation to cross-industry national TU
HR	NSP		LR	25		No	1	n/a	No		9.7	n/a	Workers' TU Association of Croatia
HU	VDSZ		MR	100	Bipartite, chemical industry SD committee	Chemical Sector Skills Council	20	No	There is only sectoral social dialogue between VDSZ and Mavesz, but this is not considered CB	Co-signing of agreements for 7 companies, but this is not considered CB	90		MASZSZ
HU	VDSZ Pharma	No	n/a	100	No		0	No			30		MASZSZ
IE	SIPTU		MR	Yes, % n/a	No	No	>100	No	No		Close to 100		ICTU
IE	Connect		MR	Yes, % n/a	No	No	<30	No	No		Probably >40		ICTU
IT	FILCTEM CGIL		MR	Yes, % n/a	No		n/a	Regularly			40	No	CGIL
IT	FEMCA CISL		MR	Yes, % n/a	No		n/a	Regularly			30	No	CISL
IT	UILTEC UIL		MR	Yes, % n/a	No		n/a	Regularly			20	No	UIL
LT	LPPSF		MR	No	No	No	5	No	No		6	No	LPSK
LT	LPS "Solidarumas"		MR	No	No	No	1	No	No		6	No	Solidarumas
LU	OGB-L		LR	60	No	No	n/a: part of OGB-L	No	No		60	No	OGB-L
LU	LCGB-INDUSID		LR	40	No	No	n/a: part of LCGB	No	No		40	No	LCGB
LV	LIA		LR	Yes, % n/a			3	Ad hoc	No		15	No	Free TU Confederation of Latvia
MT	GWU		LR	No		No	30-35	Ad hoc	No		n/a	No	n/a

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Representative (Yes/No)	Legal requirement or mutual recognition	% of elected employee representatives	Involved in bi- or tripartite SD for chemical sector	Involved in paritarian organisation(s)	Number of TU employees	Consulted by government	Involved in sector-level CB	Involved in company-level CB	% of national sector workforce covered by CB of this TU	Involved in industrial action	Affiliation to cross-industry national TU
NL	FNV		LR	No			600–800	No	No		n/a	n/a	n/a
NL	CNV		LR	No			200	Regularly	No		n/a		n/a
NL	De Unie		LR	No	n/a	n/a	n/a	n/a			n/a	n/a	n/a
PL	SPCH NSZZ “Solidarność”		LR	70		No	2	Regularly	No		10		NSZZ “Solidarność”
PL	PZZ “Kadra”	No (Y, via FZZ*)	LR	Yes, % n/a		No	3	Regularly	No		n/a	No	FZZ
PL	ZZIT		LR	n/a		No	n/a	Regularly	No		n/a	No	OPZZ
PL	OZZZPRC		LR	n/a		No	1	Regularly	No		n/a		FZZ
PL	FZZPChSziC		LR	n/a		No	2	Regularly	No		n/a	No	OPZZ
PT	Fiequimetal		MR	Yes, % n/a	No	Probably not	n/a	n/a			4		CGTP-IN
PT	SINDEQ		MR	11 representatives on 3 works councils	No	No	8	No			Indirectly 75–95 via co-signature		UGT
PT	SIMA		MR	Yes, % n/a		No	n/a	Ad hoc			0.2	TU maintains dialogue in sector	None
PT	COFESINT		MR	Probably none	Probably not	Probably not	n/a	Probably not			Indirectly 75–95 via co-signature	Via COFESINT member unions	UGT
PT	SITese		MR	Yes, % n/a	Probably not	Probably not	n/a	Probably not			0–20	n/a	UGT
PT	SITEMAQ	n/a	n/a	n/a	n/a	n/a	n/a	Probably not			Indirectly 75–95 via co-signature	n/a	UGT
PT	FE		MR	Probably none	Probably not	Probably not	n/a	Probably not			Indirectly 75–95 via co-signature	n/a	UGT
RO	FSLCP		LR	Yes, % n/a			2	No	No		60		CNS Cartel Alfa

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Representative (Yes/No)	Legal requirement or mutual recognition	% of elected employee representatives	Involved in bi- or tripartite SD for chemical sector	Involved in paritarian organisation(s)	Number of TU employees	Consulted by government	Involved in sector-level CB	Involved in company-level CB	% of national sector workforce covered by CB of this TU	Involved in industrial action	Affiliation to cross-industry national TU
RO	FLE		LR	Yes, % n/a		No	2	No	No	At company level or via members	10		CNSLR Fratia
SE	IF Metall		MR	No		No	600 for all of IF Metall; n/a for chemicals	Regularly			n/a	No	LO
SE	Unionen		MR	No		No	n/a	Regularly			n/a	n/a	TCO
SE	SI		MR	No		No	150	Regularly			n/a	No	Saco
SE	Naturvetarna		MR	No		No	n/a	Regularly			n/a	n/a	Saco
SE	Ledarna		MR	No		No	n/a	Ad hoc			n/a	n/a; probably not	None
SI	ZSSS-KNG ¹⁷		LR	100		No	2	Ad hoc			n/a		ZSSS
SI	KSS Pergam	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
SI	SKGIPS-KS-90		LR	Yes, % n/a		No	2	Ad hoc		No	n/a	n/a	KS-90
SI	KNSS		LR	Yes, % n/a		No	n/a	Ad hoc			n/a	n/a	KS-90
SK	AZCHFP SR		LR	~5		No	2	No			≤20	n/a	None
SK	ECHOZ		LR	>95		No	9	Regularly			~40		KOZ SR

Notes: Cells shaded in green indicate 'yes'. The organisations shaded in orange are those that are not affiliated to IndustriAll Europe. * Poland's PZZ KADRA is not representative for the chemical sector but is representative as the trade union affiliated to the cross-sectoral federation (FZZ). LR, legal requirement; MR, mutual recognition; MS, Member State; n/a no information available; SD, social dialogue; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹⁷ Not directly affiliated to IndustriAll Europe, but affiliated indirectly through ZSSS.

Representativeness of the European social partner organisations: Chemical sector

Table A36: Collective bargaining coverage of national sectoral trade unions

MS	Abbreviation	TU involved in sector-level CB	TU involved in company-level CB	% of national sector workforce covered by CB of this TU	Parts of the sector covered by CB of this TU											CB coverage by type of worker						CB coverage by size of company (no. of employees)							
					20.1	21	22.1	22.2	22.22	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Self-employed	Subcontractors	Blue-collar	White-collar	Lab employees	R&D	Management	1-9	10-49	50-249	250+		
EU27	TOTALS	Yes: 50 No: 32	Yes: 62 No: 19		Y: 64 N: 16	Y: 63 N: 18	Y: 63 N: 18	Y: 61 N: 21	Y: 57 N: 25	Y: 38 N: 43	Y: 58 N: 22	Y: 64 N: 17	Y: 57 N: 24	Y: 58 N: 23	Y: 53 N: 27	Y: 25 N: 54	Y: 2 N: 80	Y: 47 N: 34	Y: 67 N: 14	Y: 72 N: 9	Y: 48 N: 31	Y: 44 N: 35	Y: 54 N: 25	Y: 53 N: 26	Y: 67 N: 14	Y: 72 N: 9	Y: 74 N: 6		
	MSS with TU	15	22																										
	MSS without TU	12 (BG, CY, EE, HR, IE, LT, LU, LV, MT, NL, PL, RO)	5 (AT, BG, CZ, EE, FI)																										
AT	PRO-GE		No	50																									
AT	GPA		No	50																									
BE	BBTK-SETCa		No	100																									
BE	AC-CG			100																									
BE	ACV-CSC BIE			100																									
BE	ACV-CSC CNE			100																									
BE	ACVLB-CGSLB			100																									
BG	НФТ "Химия и индустрия"	No	No	16																									
BG	НФ „Химия“ – КТ „Подкрепа“	No	No	16																									
CY	ΣΕΒΕΤΥΚ-ΠΕΟ	No		66																									
CY	ΔΕΟΚ	n/a																											
CY	ΟΒΙΕΚ-ΣΕΚ	No		66																									
CZ	OS ECHO		No	35																									
CZ	ROSa	No	No	4																									
DE	IG BCE			68																									
DE	VAA																												
DE	CG BCE	n/a																											
DK	CO-industri		No	n/a, majority covered by 2 agreements negotiated by CO-industri																									
DK	IDA	No		Covered by company agreements	n/a																				n/a	n/a	n/a	n/a	

Representativeness of the European social partner organisations: Chemical sector

MS	Abbreviation	TU involved in sector-level CB	TU involved in company-level CB	% of national sector workforce covered by CB of this TU	Parts of the sector covered by CB of this TU											CB coverage by type of worker						CB coverage by size of company (no. of employees)						
					20.1	21	22.1	22.2	22.22	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Self-employed	Subcontractors	Blue-collar	White-collar	Lab employees	R&D	Management	1-9	10-49	50-249	250+	
EE	KAÜ	No	No	n/a																								
EL	OEXBE			100																								
EL	OEDSEE/ OEFSEE		n/a	n/a																								
EL	PEF/ΠOE	No	No	1%																								
ES	CCOO Industria			100																								
ES	UGT-FICA			100																								
ES	ELA	No		5																								
ES	FI-USO	No		5																								
ES	FESIQ-CGT	No		n/a																								
FI	Sähköliitto		No	<1													Probably											
FI	IL	Via YTN	No	4							Via YTN	Via YTN		Via YTN		Via YTN		Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN
FI	TEK	Via YTN	No	9	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN		Via YTN		Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN
FI	Teosuusliitto		No	60											n/a	n/a				n/a	n/a		Probably	Probably	Probably	Probably		
FI	Pro		No	25																Probably	Probably							
FI	TEK	Via YTN	No	9	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN		Via YTN		Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN	Via YTN
FR	CFE-CGC Chimie			100																								
FR	CFTC-CMTE	Only in pharma		23																								
FR	Fédéchimie FO			77																								
FR	FCE-CFDT			100																								
FR	FNIC-CGT			100																								
FR	FNTE-CGT	n/a																										
FR	FO Pharmacie	Only in pharma	Only in pharma	23																								
FR	UNSA Industrie et Construction			23																								

Representativeness of the European social partner organisations: Chemical sector

MS	Abbreviation	TU involved in sector-level CB	TU involved in company-level CB	% of national sector workforce covered by CB of this TU	Parts of the sector covered by CB of this TU											CB coverage by type of worker						CB coverage by size of company (no. of employees)					
					20.1	21	22.1	22.2	22.22	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nanomaterials	Self-employed	Subcontractors	Blue-collar	White-collar	Lab employees	R&D	Management	1-9	10-49	50-249	250+
PL	FZZPChSciC	No		n/a																							
PT	Fiequimetal			4																							
PT	SINDEQ			Indirectly 75-95 via co-signature																							
PT	SIMA			0.2																							
PT	COFESINT			Indirectly 75-95 via co-signature																							
PT	SITese			0-20																							
PT	SITEMAQ			Indirectly 75-95 via co-signature																	n/a						
PT	FE			Indirectly 75-95 via co-signature																							
RO	FSLCP	No		60																							
RO	FLE	No	At company level or via members	10																							
SE	IF Metall			n/a																							
SE	Unionen			n/a																							
SE	SI			n/a																							
SE	Naturvetarna			n/a																							
SE	Ledarna			n/a																							
SI	ZSSS-KNG			n/a																							
SI	KSS Pergam																										
SI	SKGIPS-KS-90		No	n/a																							
SI	KNSS			n/a																							
SI	AZCHFP SR			≤20																							
SI	ECHOZ			~40																							

Notes: Cells shaded in green indicate 'yes'. Cells shaded in orange indicate that the organisation is not affiliated to industriAll Europe. * Poland's PZZ KADRA is not representative for the chemical sector but is representative as the trade union affiliated to the cross-sectoral federation (FZZ). n/a, no information available.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table A37: Reasons for organisational fragmentation and pluralism on the trade unions' side in the chemical sector, 2021

Country	No. of TUs in sector	There are different TUs for specific professions, e.g. engineers	TUs organise different types of workers	TUs have members in different parts of the country	TUs have members in different types of companies (SMEs etc.)	TUs have members in different parts of the sector	TU differ in terms of ideology	Other reasons
EU27	TOTAL	7 DK, FI, IE, MT, PL, PT, SE	7 AT, BE, FI, FR, PT, SE, SK	2 BE, ES	0	5 BG, EL, FR, HR, SI	11 BE, CY, DE, ES, FR, HR, IT, LT, LU, PL, PT	4 Historical reasons (CZ), financial reasons (HR), religious reasons (NL), different umbrella organisations (RO)
AT	2							
BE	6							
BG	5							No difference in the representation
CY	3							
CZ	2							Historical reasons
DE	3							
DK	2							
EE	1	Only one TU in the sector						
EL	3							
ES	5							
FI	7							
FR	8							
HR	3							Financial reasons
HU	7							
IE	2							
IT	3							
LT	5							
LU	2							
LV	1	Only one TU in the sector						
MT	2							
NL	3							Religious beliefs: Catholic/Protestant
PL	5							
PT	8							
RO	4							Affiliation to different umbrella organisations
SE	5							
SI	4							
SK	2							

Notes: TU, trade union. Elements shaded in green indicate 'yes'.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Annex 4. National-level chemical sector employer organisations

Table A38: Abbreviations and names of employer organisations in the chemical sector, 2021

MS	Abbreviation in original language	Full name in original language	Full name in English
AT	FCIO	Fachverband der Chemischen Industrie	Federal Association of the Austrian Chemical Industry
	BICG	Bundesinnung Chemisches Gewerbe und Denkmal-, Fassaden- und Gebäudereiniger	Federal Association of Chemical Trades and Monument, Façade and Industrial Cleaning
BE	Essenscia	Essenscia	Essenscia
BG	БКХП	Българска камара на химическата промишленост	Bulgarian Chamber of Chemical Industry (BCCI)
	БГФарМА	Българска Генерична Фармацевтична Асоциация	Bulgarian Generic Pharmaceutical Association (BGPharma)
	БАП	Браншова Асоциация Полимери	Branch Association Polymers (BAP)
CY	ΚΥΣΥΦ	Κυπριακός Σύνδεσμος Φυτοπροστασίας	Cyprus Crop Protection Association
	PHARCHEM	Pharmaceutical & Chemical Industries Association	Pharmaceutical & Chemical Industries Association
	PASYPAGEF	Cyprus Association of Producers of General Medicinal Products	Cyprus Association of Producers of General Medicinal Products
	BPA	Biofuel Producers Association	Biofuel Producers Association
	CHA	Cyprus Hydrogen Association	Cyprus Hydrogen Association
	PABEP	Pancyprian Association of Biogas-Energy Producers	Pancyprian Association of Biogas-Energy Producers
	CAPC	Cyprus Association of Pharmaceutical Companies	Cyprus Association of Pharmaceutical Companies
	AMPVAS	Association of Manufacturers of Paints, Varnishes and Adhesive Substances	Association of Manufacturers of Paints, Varnishes and Adhesive Substances
	CADCMA	Cyprus Aerosol, Detergents and Cosmetics Manufacturers Association	Cyprus Aerosol, Detergents and Cosmetics Manufacturers Association
	CyPhaMA	Cyprus Pharmaceutical Manufacturers' Association	Cyprus Pharmaceutical Manufacturers' Association
	CPPA	Cyprus Plastics Processors Association	Cyprus Plastics Processors Association
CZ	SCHP ČR	Svaz chemického průmyslu České republiky	Association of Chemical Industry of the Czech Republic
	AIFP	Asociace inovativního farmaceutického průmyslu	Association of Innovative Pharmaceutical Industry
	ČAFF	Česká asociace farmaceutických firem	Czech Association of Pharmaceutical Companies
DE	ADK	Arbeitgeberverband der Deutschen Kautschukindustrie	Employers Association of the German Rubber Industry

Representativeness of the European social partner organisations: Chemical sector

	BAVC	Bundesarbeitgeberverband Chemie	German Federation of Chemical Employers' Associations
DK	DI	Dansk Industri	Confederation of Danish Industry
	Plastindustrien	Plastindustrien	Danish Plastics Federation
EE	EKTL	Eesti Keemiatööstuse Liit	Estonian Chemical Industry Association
	RTL	Ravimitootjate Liit	Association of Pharmaceutical Manufacturers in Estonia
	EPL	Eesti Plastitööstuse Liit	Estonian Plastics Association
EL	ΣΕΒ	Σύνδεσμος Επιχειρήσεων & Βιομηχανιών	Hellenic Federation of Enterprises
	ΣΦΕΕ/SFEE	Σύνδεσμος Φαρμακευτικών Επιχειρήσεων Ελλάδος	Hellenic Association of Pharmaceutical Companies
	ΣΕΧΒ	Σύνδεσμος Ελληνικών Χημικών Βιομηχανιών	Hellenic Association of Chemical Industries (HACI)
ES	Feique	Federación Empresarial de la Industria Química Española	Spanish Chemical Employers Organisation
FI	Kemianteollisuus KT ry	Kemianteollisuus KT ry	Chemical Industry Federation of Finland
FR	France chimie	France chimie (formerly UIC)	France Chemical
	FEBEA	Fédération des Entreprises de la Beauté	Federation of Beauty Companies
	FIPEC	Fédération des Industries des Peintures, Encres, Couleurs, Colles et Adhésifs, Préservation du Bois	French Federation of Coatings, Printing Inks, Colours for Artists, Adhesives, Wood Protection Industries
	Ucaplast	Union des syndicats des PME du Caoutchouc et de la Plasturgie	Union of SMEs of the Rubber and Plastics Sectors
	SNCP	Syndicat National du Caoutchouc et des Polymères	National Union of Rubber and Polymers
	LEEM	Les entreprises du médicament	The Pharmaceutical Companies
	Polyvia	Union des transformateurs de polymers	Union of Polymer Manufacturers
	Plastalliance	Plastalliance	Plastalliance
	SIMV	Syndicat de l'industrie du médicament et diagnostic vétérinaires	Union of the Veterinary Medicine and Diagnostic Industry
	SIDIV	Syndicat de l'Industrie du Diagnostic In Vitro	Union of the In Vitro Diagnostic Industry
Facophar Santé	Facophar Santé	Facophar Santé	
HR	HUP-UKI	Hrvatska udruga poslodavaca – udruga kemijske industrije	Croatian Employers' Association – Chemistry Industry Association (CEA-CIA)
HU	Mavesz	Magyar Vegyipari Szövetség	Hungarian Chemical Industry Association
	Magyosz	Magyarországi Gyógyszergyártók Országos Szövetsége	Hungarian Pharmaceutical Manufacturers' Association
IE	BioPharmaChem	BioPharmaChem	BioPharmaChem

Representativeness of the European social partner organisations: Chemical sector

IT	Federchimica	Federazione Nazionale dell'Industria Chimica	Italian Federation of the Chemical Industry
	Farmindustria	Federazione Nazionale dell'Industria Farmaceutica	Italian Federation of the Pharmaceutical Industry
LT	LChPJA	Lietuvos chemijos pramonės įmonių asociacija	Association of Lithuanian Chemical Industry Companies
	LINPRA	Lietuvos inžinerijos ir technologijų pramonės asociacija	Association of Lithuanian Engineering and Technology Industry
	NFPA	Nacionalinė farmacijos pramonės asociacija	National Association of the Pharmaceutical Industry
	IFPA	Inovatyvios farmacijos pramonės asociacija	Association of Innovative Pharmaceutical Industry
LU	No employer organisation or business association in the sector		
LV	Laķīfa	Latvijas Ķīmijas un farmācijas uzņēmēju asociācija	Association of the Latvian Chemical and Pharmaceutical Industry
MT	MEA	Malta Employers Organisation	Malta Employers Organisation
NL	VNCI	De Koninklijke Vereniging van de Nederlandse Chemische Industrie	The Royal Association of the Dutch Chemical Industry
	AWVN	Algemene Werkgeversvereniging Nederland	General Employers Association of the Netherlands
	Federatie NRK	Federatie Nederlandse vereniging voor Kunststof en Rubber	Federation Dutch Union for Plastics and Rubber
	De VVVF	De Vereniging van Verf- en Drukinktfabrikanten	The Association of Paint and Printing Ink Manufacturers
PL	PIPC	Polska Izba Przemysłu Chemicznego	Polish Chamber of Chemical Industry
	PZPPF	Polski Związek Pracodawców Przemysłu Farmaceutycznego	Polish Association of Pharmaceutical Industry Employers
PT	APQuímica	Associação Portuguesa da Química, Petroquímica e Refinação	Portuguese Association of Chemical Companies
	Apifarma	Associação Portuguesa da Indústria Farmacêutica	Portuguese Association of the Pharmaceutical Industry
	APCAS	Associação Portuguesa de Colas, Adesivos e Selantes (former Associação da Indústria e Comércio de Colas e Similares)	Portuguese Association of Glues, Adhesives and Sealants
	AIC	Associação dos Industriais de Cosmética, Perfumaria e Higiene Corporal	Association of Cosmetic, Perfumery and Toiletry Manufacturers
	AISDPCL	Associação dos Industriais de Sabões, Detergentes e Produtos de Conservação e Limpeza	Association of Manufacturers of Soaps, Detergents and Maintenance and Cleaning Products
	ANIRP	Associação Nacional de Recauchagem de Pneus	National Tyre Retreading Association

Representativeness of the European social partner organisations: Chemical sector

	APT	Associação Portuguesa de Tintas	Portuguese Association of Paints
	APIP	Associação Portuguesa da Indústria de Plásticos	Portuguese Association of Plastics Industry
	APIB	Associação Portuguesa dos Industriais de Borracha	Portuguese Association of Rubber Manufacturers
	Anipla	Associação Nacional da Indústria para a Proteção das Plantas	National Plant Protection Industry Association
RO	APDCR	Asociația Producătorilor și Distribuitorilor de Chimicale din România	Romanian Chemical Producers and Distributors Association
	n/a	Patronatul Confindustria România	Confindustria România
SE	IKEM	Innovations- och kemiarbetsgivarna i Sverige	Innovation and Chemical Industries in Sweden
SI	ACIS	Gospodarska Zbornica Slovenije – Združenje kemijske industrije	Chamber of Commerce and Industry of Slovenia – Association of Chemical Industries of Slovenia
	ZDS	Združenje delodajalcev Slovenije – Sekcija za kemijo	Association of Employers of Slovenia – Chemistry Section
SK	ZCHFP	Zväz chemického a farmaceutického priemyslu Slovenskej republiky	Association of Chemical and Pharmaceutical Industry of the Slovak Republic

Table A39: Membership domain of employer organisations/business associations

Member State	Abbreviation	Members in NACE sector												Members in other sectors							
		20.1	21	22.1	22.2	22.22	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nano-materials	Metal	Construction	Energy, electricity and gas	Automotive	Extractive	Commerce, sale of chemicals	Other	
EU 27	TOTAL EO/BAs	26	34	27	29	27	18	23	26	27	26	16	14	8	6	5	4	7	22	26	
EU 27	TOTAL MSs with EO/BA in sector	21	21	19	17	17	12	20	20	20	20	15	13	7	5	5	4	5	12	16	
AT	FCIO																			n/a	
AT	BICG																			Monument, façade and industrial cleaning sector	
BE	Essenscia																				
BG	БКХП																				
BG	БГФарма																				
BG	БАП																				
CY	ΚΥΣΥΦ																				
CZ	SCHP ČR																			Research institution in chemicals	
DE	ADK																				
DE	BAVC																			Sector-related services, such as chemical parks	
DK	DI																			All manufacturing industry	
DK	Plastindustrien (part of DI)																			Plastics in furniture and toys	
EE	EKTL																			Cosmetics	
EE	RTL																				
EE	EPL																				
EL	ΣΕΒ																n/a		n/a	n/a	
EL	ΣΦΕΕ/SFEE																				
EL	ΣΕΧΒ																			Construction materials	
ES	Feique																				
FI	Kemianteollisuus KT ry																			Biotech innovation and development, manufacture of paper and cardboard products	
FR	France chimie																			R&D	
FR	FEBEA																			Wholesale trade, pharmacy	

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Members in NACE sector													Members in other sectors						
		20.1	21	22.1	22.2	22.22	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nano-materials	Metal	Construction	Energy, electricity and gas	Automotive	Extractive	Commerce, sale of chemicals	Other	
FR	FIPEC																				
FR	Ucaplast																				Wholesale of plastic products
FR	SNCP																				
FR	LEEM																				
FR	Polyvia																				
FR	Plastalliance																				
FR	SIMV																				
FR	SIDIV																				
FR	Facophar Santé																				
HR	HUP-UKI																				
HU	Mavesz																				Consulting
HU	Magyosz																				Biotechnological R&D (NACE 7211); other natural science, technological research (NACE 7219); production of other food (NACE 1089)
IT	Federchimica																				
IT	Farmindustria																				
LT	LChPJA																				
LT	LINPRA																				
LV	Laķīfa																				
MT	MEA																				Wholesale and retail, clinics, schools, professional services, insurance, financial services. No self-employed
NL	VNCI							n/a				n/a	n/a								
NL	Federatie NRK													n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NL	De VVVF																				
PL	PIPC																				Manufacture of coke and refined petroleum products; transport, distribution; scientific research institutes; consultancy, tech companies

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Members in NACE sector													Members in other sectors						
		20.1	21	22.1	22.2	22.22	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nano-materials	Metal	Construction	Energy, electricity and gas	Automotive	Extractive	Commerce, sale of chemicals	Other	
PL	PZPPF																				
PT	APQuímica				n/a	n/a	n/a	n/a		n/a		n/a	n/a							Logging, manufacture of oils, manufacture of electric appliances, other manufacture of gas, hazardous waste, retail sale of flowers etc., pet animals and pet food, engineering, technical testing and analysis, other research, other human health activities, tertiary education, local authorities	
PT	Apifarma																			Real estate, biotechnology research, other research on natural sciences and engineering	
PT	APCAS						n/a						n/a							NACE 23: manufacture of non-metallic mineral products	
PT	AIC																			Manufacture of light metal packaging	
PT	AISDPCL																				
PT	ANIRP																		Possibly		
PT	APT																				
PT	APIP						n/a													NACE 13 textiles, NACE 15 leather, NACE 32 other manufacturing, NACE 38 waste collection	
PT	APIB																			NACE 38 waste collection	
PT	Anipla																			NACE 52	
RO	APDCR																			Transport of chemicals	
RO	Confindustria Romania												n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
SE	IKEM																			Stone, glass, recycling	
SI	ACIS																				
SI	ZDS																			All private sectors	

Representativeness of the European social partner organisations: Chemical sector

Member State	Abbreviation	Members in NACE sector											Members in other sectors							
		20.1	21	22.1	22.2	22.22	Single-use plastics	20.2	20.3	20.4	20.5	20.6	Nano-materials	Metal	Construction	Energy, electricity and gas	Automotive	Extractive	Commerce, sale of chemicals	Other
SK	ZCHFP																			Suppliers of pharmaceutical products; building, assembly, maintenance, R&D, education

Notes: No relevant employer organisation/business association in the sector in Ireland or Luxembourg. Employer organisations/business associations for which no factsheet was included in the Network of Eurofound Correspondents reports are not included in this table. Cells shaded in green indicate 'yes'. The organisations shaded in blue are those that are affiliated to ECEG.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table A24 indicates whether the sector-related employer organisations and business associations cover at least part of all subsectors making up the chemical sector for the purposes of the present study. Just eight organisations from seven EU Member States do so. By contrast, 35 organisations represent members that are active in only one or two of the subsectors covered by this study.

The membership domains of employer associations and business organisations can strictly correspond to the demarcation of the sector (congruence), and this was the case for 3 of the 59 organisations covered. The membership domains of another five organisations go beyond the chemical sector as described here (overlap). Another 21 of the 59 organisations cover part of the chemical sector and nothing else, while for the remaining 30 the membership domain covers part of the chemical sector and also organises other sectors.

Table A40: Sector coverage of the chemical sector employer organisations and business associations, 2021

Country	Employer organisation/business association	At least part of NACE 20	At least part of NACE 21	At least part of NACE 22	Single-use plastics	Nano-materials	Organising sectors other than chemical	Membership domain relative to chemical sector
EU27	59 organisations	37	34	36	18	14	35	
EU27	In 24 Member States	23	22	21	12	13	19	SO, 30; C, 3; O, 5; S, 21
AT	FCIO							O
AT	BICG							SO
BE	Essenscia							C
BG	БХХП							SO
BG	БГФарма							S
BG	БАП							S
CY	ΚΥΣΥΦ							S
CZ	SCHP ČR							SO
DE	ADK							S
DE	BAVC							O
DK	DI							SO
DK	Plastindustrien (part of DI)							SO
EE	EKTL							SO
EE	RTL							S
EE	EPL							S
EL	ΣΕΒ							SO
EL	ΣΦΕΕ/SFEE							S
EL	ΣΕΧΒ							SO
ES	Feique							C
FI	Kemianteollisuus KT ry							SO
FR	France chimie							SO
FR	FEBEA							SO
FR	FIPEC							S
FR	Ucaplast							SO
FR	SNCP							S
FR	LEEM							S
FR	Polyvia							S
FR	Plastalliance							S
FR	SIMV							S
FR	SIDIV							S
FR	Facophar Santé							S
HR	HUP-UKI							S
HU	Mavesz							SO
HU	Magyosz							SO

Representativeness of the European social partner organisations: Chemical sector

IT	Federchimica							SO
IT	Farmindustria							S
LT	LChPIA							
LT	LINPRA							
LV	Laķifa							SO
MT	MEA							SO
NL	VNCI					n/a		S
NL	Federatie NRK						n/a	S
NL	De VVVF							S
PL	PIPC							SO
PL	PZPPF							SO
PT	APQuímica				n/a	n/a		SO
PT	Apifarma							SO
PT	APCAS				n/a	n/a		SO
PT	AIC							SO
PT	AISDPCL							SO
PT	ANIRP							SO
PT	APT							SO
PT	APIP				n/a			SO
PT	APIB							SO
PT	Anipla							SO
RO	APDCR							SO
RO	Confindustria Romania						n/a	S
SE	IKEM							O
SI	ACIS							C
SI	ZDS							O
SK	ZCHFP							O

Notes: C, congruence; n/a, information not available; O, overlap; S, sectionalism; SO, sectional overlap. No relevant employer organisation/business association in the sector in Ireland or Luxembourg. Employer organisations/business associations for which no factsheet was included in the Network of Eurofound Correspondents reports are not included in this table. Cell shaded in green indicate 'yes'. The organisations shaded in blue are those that are affiliated to ECEG.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Representativeness of the European social partner organisations: Chemical sector

Table A41: Membership strength of employer organisations and/or business associations

Country	Abbreviation	No. of member companies in chemical sector	Member companies in size range by number of employees						Figure is ...				Trend in EO/BA membership, past 2–3 years	% of workforce of member companies	Size ranking in sector
			1–9 (no.)	1–9 (%)	10–249 (no.)	10–249 (%)	250+ (no.)	250+ (%)	Exact number from DB	Estimate – DB is not sector specific	Estimate – DB is kept regionally	Estimate – organisation does not disclose			
EU27	TOTALS	13,493 (info for 52 organisations)							Yes: 34	Yes: 8	Yes: 1	Yes: 5	Increased: 15 Stable: 19 Decreased: 10		1st largest: 31 2nd largest: 12 3rd largest: 4
AT	FCIO	306	91		160		55		Yes				Stable	80	1st
AT	BICG	1,024		91.7		7.9	0.4		Yes				Increased	20	2nd
BE	Essenscia	720	n/a	n/a	n/a	n/a	n/a	n/a	Yes				Decreased	n/a	1st (only one)
BG	БКХП	30		5		15		80		Yes			Decreased	50	n/a
BG	БГФарма	15					15		Yes				Increased	10	1st (only one in pharmaceuticals)
BG	БАП	34	1		30		3		Yes				Increased	40	1st (only one in plastics)
CY	ΚΥΣΥΦ	6			6				Yes				Decreased	6.5	Not in top 3
CZ	SCHP ČR	136		5		75	20		Yes				Increased	20	1st (only one)
DE	ADK	160	0		120		40		Yes				Increased	8	2nd
DE	BAVC	1,900	250		300		1,280				Yes		Stable	65	1st
DK	DI	62	17		32		13		Yes				Stable	No data but probably <60% (non-member Novo Nordisk has 35% of workforce)	1st
DK	Plastindustrien (part of DI)	n/a; ~275 members; ~70% of plastics turnover; ≥26,000 workers employed in plastics manufacturing	n/a	n/a	n/a; estimates majority are in 10–249 range	n/a	n/a	n/a		Yes			n/a	n/a	1st in plastics

Representativeness of the European social partner organisations: Chemical sector

		(not just chemical sector) = almost 10% of Danish manufacturing industry, 1% of all employees													
EE	EKTL	46	16		25		5		Yes				Stable	68	1st
EE	RTL	28	No data		No data		No data				Yes		Increased	4.5	3rd
EE	EPL	46	No data		No data		No data			Yes			Stable	No data	2nd
EL	ΣEB	n/a	n/a	n/a	n/a	n/a	n/a	n/a	No data on chemicals – 3,500 members in all sectors				Stable	No data	1st
EL	ΣΦEE/SFEE	62				60.0		40.0		Yes			Stable	47	1st
EL	ΣEXB	74 (26 founding members)		2.0		95.0		3.0		Yes			Increased	90	1st
ES	Feique	1,500		55		39		6	Yes				Increased	8.8	1st
FI	Kemianteollisuus KT ry	183	25		149		9		Yes				Stable	70	1st
FR	France chimie	960	129		n/a		n/a			Yes			Stable	60	1st
FR	FEBEA	216	35		130		51		Yes				Decreased	23	2nd
FR	FIPEC	140	n/a				n/a		Yes				Decreased	~9–10% of branch workforce (EO)	3rd
FR	Ucaplast	63	n/a		n/a		n/a		Yes (2017 report)				Decreased	8.41% of rubber branch workforce (2021 report)	2nd
FR	SNCP	120	n/a		n/a		n/a		Yes (website)				Stable	91.59% of rubber branch workforce (2021 report)	1st in rubber
FR	LEEM	264	28		148		88		Yes				Stable	100	1st (only one in pharmaceuticals)
FR	Polyvia	3,500	n/a		n/a		n/a		Yes (website)				n/a	FPC members 88.24% of plastic branch workforce (2021 report); 122,000 employees of	1st in plastics

Representativeness of the European social partner organisations: Chemical sector

														Polyvia members (website)	
FR	Plastalliance	172	n/a		n/a		n/a					n/a		11.76% of plastic branch workforce (2021 report)	2nd in plastics
FR	SIMV	41	n/a		n/a		n/a	Yes (website)				n/a	7,407 employees	2nd in pharmaceuticals	
FR	SIDIV	100	n/a		n/a		n/a					n/a	n/a	1st in pharmaceuticals	
FR	Facophar Santé	17	n/a		n/a		n/a	(2017 report)				n/a	1,527 employees	3rd in pharmaceuticals	
HR	HUP-UKI	10%		5		10		25	Yes			Stable	20	1st (only one)	
HU	Mavesz	54	0		49		5		Yes			Increased	50	1st	
HU	Magyosz	17	0		9 + 1 affiliate		7		Yes			Stable	80	2nd	
IT	Federchimica	1,418	446		902		70		Yes			Increased	90	1st	
IT	Farmindustria	200	n/a		n/a		n/a		No	No	No	No	Stable	10	2nd
LT	LChPIA														
LT	LINPRA														
LV	Lakīfa	45	10		32		3		Yes			Stable	35	1st (only one)	
MT	MEA	80	10		60		10		Yes			Stable	n/a	1st	
NL	VNCI	100	n/a		n/a		n/a		n/a	n/a	n/a	n/a	Increased	90	1st
NL	AWVN – no factsheet													n/a	
NL	Federatie NRK	400	n/a		n/a		n/a		n/a	n/a	n/a	n/a	n/a	n/a	
NL	De VVVF	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	1st	
PL	PIPC	142	n/a		n/a		n/a		Yes			Increased	n/a	1st	
PL	PZPPF	n/a	n/a		n/a		n/a					n/a	n/a	2nd	
PT	APQuímica	31	4		20		7				Yes	n/a	11	1st	
PT	Apifarma	25	1		22		2		Yes			Decreased	5.4	2nd	
PT	APCAS	8	1		7		0		Yes			n/a	0.9	Not in top 3, small	
PT	AIC	n/a; 11 of 12 companies on AIC board (2016) in wholesale/retail sector, only 1 with 35 workers belongs to NACE 20.4.	n/a	n/a	n/a	n/a	n/a	n/a				n/a	Considerably below 5%; cosmetics subsector of NACE 20.4 employs 5% of chemical sector workforce	Not in top 3, very small	

Representativeness of the European social partner organisations: Chemical sector

		Hence, AIC mostly outside the sector												
PT	AISDPCL	n/a, but clear indications mostly outside the sector	n/a		n/a		n/a					n/a	Far below 10%, probably less than 1%	Not in top 3, very small
PT	ANIRP	20	n/a		n/a		n/a					n/a	1	Not in top 3, very small
PT	APT	27	0		25		2		Yes			Decreased	5.2	3rd
PT	APIP	36	2		32		2		Yes (member list)			Decreased	4.6	4th
PT	APIB	9 (1 member in sector without data regarding number of workers)	1		6		1		Yes (member list)			Decreased	3.5	5th
PT	Anipla	5 (2 members in sector without data regarding number of workers)	0		2		1		Yes (member list)			Increased	0.8	Not in top 3, small
RO	APDCR	18	2		13		3		Yes			Increased	n/a	n/a
RO	Confindustria Romania	1					1				Yes	n/a	n/a	n/a
SE	IKEM	1,150	423		674		55		Yes			Stable	95	1st (only one)
SI	ACIS	n/a	n/a		n/a		n/a				Yes	Stable	Confidential	1st
SI	ZDS	9	n/a		n/a		n/a				Yes	Stable	65–70	2nd
SK	ZCHFP	45	3		33		9		Yes			Increased	35	1st (only one)

Notes: DB, database; EO, employer organisation; n/a, no information available. The organisations shaded in blue are those that are affiliated to ECEG.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Thirty-one of the 60 employer organisations/business associations covered are the largest in the sector. Another 12 are the second largest in the sector, and 4 are the third largest. Membership has remained stable in recent years in 19 of the 60 organisations covered, increased in 15 and decreased in 10, while this information was not available for 15 of the 60.

Representativeness of the European social partner organisations: Chemical sector

Table A42: Employer organisation/business association membership by company size groups

Country	ABBREVIATION	Membership from each type of company by number of employees					Largest proportion of membership fees from ...			Organises activities for SMEs and microenterprises	Covers entire country
		Sub-contractors	1–9	10–49	50–249	250+	Large companies (>250)	SMEs (10–249)	Micro-enterprises (1–9)		
EU 27	TOTAL (out of 94 organisations)	16	34	42	40	40	19	18	4	21	53
EU 27	TOTAL Member States	9	19	22	22	22	11	11	2 (AT, FR)	16	27
AT	FCIO									No	
AT	BICG									Yes, information activities	
BE	Essenscia						n/a	n/a	n/a	Yes, specific SME commission for SME needs	
BG	БКХП									n/a	n/a
BG	БГФармА									No	
BG	БАП									No	
CY	ΚΥΣΥΦ										
CZ	SCHP ČR									Yes	
DE	ADK									Yes	
DE	BAVC									Yes	
DK	DI						n/a	n/a	n/a	n/a	
DK	Plastindustrien (part of DI)	n/a	n/a	n/a	n/a	n/a				Yes, SME innovation programme, SME conference	
EE	EKTL	n/a					n/a	n/a	n/a	No	
EE	RTL	n/a	n/a	n/a	n/a		n/a	n/a	n/a	No	
EE	EPL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	No	
EL	ΣΕΒ						n/a	n/a	n/a	No	
EL	ΣΦΕΕ/SFEE						n/a	n/a	n/a	No	
EL	ΣΕΧΒ	n/a	n/a	n/a	n/a	n/a				Yes, seminars	
ES	Feique									No	
FI	Kemianteollisuus KT ry									No	
FR	France chimie									Yes, support in digitalisation, access to public funding	
FR	FEBEA									Yes	

Representativeness of the European social partner organisations: Chemical sector

FR	FIPEC									n/a	
FR	Ucaplast									n/a	
FR	SNCP									n/a	
FR	LEEM									n/a	
FR	Polyvia	n/a	n/a	n/a	n/a	n/a				n/a	
FR	Plastalliance									n/a	
FR	SIMV									n/a	
FR	SIDIV									n/a	
FR	Facophar Santé									n/a	
HR	HUP-UKI									Yes, help with EU funds	
HU	Mavesz									Yes	
HU	Magyosz									Yes, SME committee	
IT	Federchimica									No	
IT	Farindustria									No	
LT	LChPIA										
LT	LINPRA										
LV	Laķīfa									Yes, most members are SMEs	
MT	MEA									Yes, human resources support	
NL	VNCI	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Yes, online platform Chemielink to help SMEs with legislation, permits and networking	
NL	Federatie NRK	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NL	De VVVF									n/a	n/a
PL	PIPC						n/a	n/a	n/a	n/a	
PL	PZPPF									No	
PT	APQuímica	n/a					n/a	n/a	n/a	n/a	
PT	Apifarma	n/a					n/a	n/a	n/a	n/a	
PT	APCAS						n/a	n/a	n/a	Yes, since all members are SMEs	
PT	AIC	n/a	n/a		n/a	n/a	n/a	n/a	n/a	n/a	
PT	AISDPCL	n/a	n/a		n/a	n/a	n/a	n/a	n/a	n/a	
PT	ANIRP						n/a	n/a	n/a	n/a	

Representativeness of the European social partner organisations: Chemical sector

PT	APT					n/a	n/a	n/a	n/a but majority of members SMEs	
PT	APIP					n/a	n/a	n/a	n/a	n/a
PT	APIB					n/a	n/a	n/a	n/a but majority of members SMEs	n/a
PT	Anipla		n/a		n/a		n/a	n/a	No	n/a
RO	APDCR								Yes, implementation of the programme Responsible Care	
RO	Confindustria Romania					n/a	n/a	n/a	n/a	
SE	IKEM								No	
SI	ACIS								Yes, tailored advice	
SI	ZDS								No	
SK	ZCHFP								Yes, guidance on legislation	

Notes: Cells shaded in green indicate 'yes'. The organisations shaded in blue are those that are affiliated to ECEG. n/a, no information available.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Employer organisations/business associations have member companies in comparable proportions from three types of company sizes (companies with 10–49, 50–249 and 250+ employees), while fewer have microenterprises (under 10 employees) as members. Similarly, they mostly get the majority of their membership fees from large companies (250+ employees) and SMEs, but not so often from microenterprises.

Representativeness of the European social partner organisations: Chemical sector

Table A43: Situation of employer organisations/business associations in the sectoral industrial relations landscape of the country

Country	Abbreviation	EO or BA	Representative	LR/MR	involved in bi- or tripartite SD in chemicals	Role in CB at company level	involved in paritarian organisation	No. of staff	Consulted by government	Involved in CB at sector level	Involved in CB at company level	Parts of sector covered by CB										Members from company size group					Affiliation to cross-industry national EO/BA	
												20.1	21	22.1	22.2	22.22	Single-use plastic	20.2	20.3	20.4	20.5	20.6	Subcontractors	1-9 employees	10-49 employees	50-249 employees		250+ employees
EU 27	TOTAL: 60 EOs in 24 MSs		Yes: 51		Yes: 35		Yes: 21		Yes: 37	Yes: 39	Yes: 6	Y: 26	Y: 32	Y: 28	Y: 28	Y: 27	Y: 14	Y: 23	Y: 27	Y: 26	Y: 27	Y: 21	Y: 22	Y: 29	Y: 32	Y: 34	Y: 36	
AT	FCIO	EO	Yes	LR + MR	Yes, both	CB is MEB but some examples of CA between EO (on behalf of member) and TUs, e.g. Sunday work, where EO advises and engages	No	15	Ad hoc	Yes	No																	Federal Economic Chamber (WKO)
AT	BICG	EO	Yes	LR + MR	Yes, both	No company-level CA in which the EO would be involved	No	6	Ad hoc	Yes	No																	WKO
BE	Essenscia	EO	Yes	LR + MR	Yes	Advice, support to CEO or to employer representatives	Yes	n/a	Regularly	Yes	No																	VBO
BG	БКХП	EO	Yes	LR	Yes	No CBA, but there is a memorandum of cooperation with TUs	No	2	Ad hoc	No	No																	Bulgarian Industrial Association (BIA); BCCI
BG	БГФарма	BA	Yes	LR	Yes, tripartite SD via affiliated EO	No role	No	2	Ad hoc	Yes	No																	Confederation of Employers and Industrialists in Bulgaria (KRIB)
BG	БАП	Branch association	Yes	LR	Yes, tripartite SD through affiliated EO	No role	No	1	Ad hoc	No	No																	BIA; KRIB
CY	ΚΥΣΥΦ	BA	No		No	No role in CB	No	1	Regularly	No	No																	Cyprus Chamber of Commerce and Industry
CZ	SCHP ČR	EO	Yes	MR	Yes	EO advising role. Company-level CAs can only be concluded between employer and TU(s)	No	11	Regularly	Yes	No																	Confederation of Industry of the Czech Republic

Representativeness of the European social partner organisations: Chemical sector

Country	Abbreviation	EO or BA	Representative	LR/MR	Involved in bi- or tripartite SD in chemicals	Role in CB at company level	Involved in paritarian organisation	No. of staff	Consulted by government	Involved in CB at sector level	Involved in CB at company level	Parts of sector covered by CB										Members from company size group					Affiliation to cross-industry national EO/BA		
												20.1	21	22.1	22.2	22.22	Single-use plastic	20.2	20.3	20.4	20.5	20.6	Subcontractors	1-9 employees	10-49 employees	50-249 employees		250+ employees	
						at workplace																							
DE	ADK	EO	Yes	MR	No	Concludes company-level agreement	Yes	20	Ad hoc	Yes	Yes																		BDA
DE	BAVC	EO	Yes	MR	No	No role	Yes	32	Ad hoc	Yes	No																		BDA
DK	DI	EO	Yes	MR	Yes, BFA Industri (trade association)	Companies covered by IA and CA for salaried employees both negotiated by DI and CO-industri	Yes	640	Regularly	Yes	No																		n/a: it is a cross-industry national EO
DK	Plastindustrien	BA	Yes	MR	No	Plast-industrien is BA, not involved in CB, but is member of Confederation of DI, located in DI HQ. Assists members with environment, education, communications, innovation tasks, etc.	Yes	8	Regularly	No	No	n/a																	DI
EE	EKTL	BA	No criteria in EE		No	No role in CB	No	3	No	No	No																		None
EE	RTL	BA	No criteria in EE		No	No role in CB	No	2	No	No	No																		Estonian Employers Confederation
EE	EPL	BA	No criteria in EE		No	No role in CB	No	1	No	No	No																		
EL	ΣΕΒ	EO	Yes	MR	Yes, bipartite	Company agreement concluded between CEO and elected employee reps	Yes	n/a	Regularly	Yes	No																		n/a
EL	ΣΦΕΕ/SFEE	Both	Yes		Yes	EO bargains with TUs. EO represented by CEOs in such discussions	EO ad hoc training	14	Regularly	Yes	Yes																		SEV
EL	ΣΕΧΒ	BA	No		No	No direct role	No	1	Ad hoc	No	No																		SEVs

Representativeness of the European social partner organisations: Chemical sector

Country	Abbreviation	EO or BA	Representative	LR/NR	involved in bi- or tripartite SD in chemicals	Role in CB at company level	involved in paritarian organisation	No. of staff	Consulted by government	Involved in CB at sector level	Involved in CB at company level	Parts of sector covered by CB										Members from company size group					Affiliation to cross-industry national EO/BA												
												20.1	21	22.1	22.2	22.22	Single-use plastic	20.2	20.3	20.4	20.5	20.6	Subcontractors	1-9 employees	10-49 employees	50-249 employees		250+ employees											
ES	Feique	EO	Yes	LR	Yes	No role. Vast majority of companies apply the sectoral agreement. The company agreements in the sector are secondary	n/a	18	Ad hoc	Yes	No																												n/a
FI	KT ry	EO	Yes	MR	Yes, bipartite	2 company-level CAs; EOs are signatories and lead in negotiations	Yes	20	Ad hoc	Yes	Yes																											Confederation of Finnish Industries EK	
FR	France chimie	EO	Yes	LR	Yes, in the framework of the national CA for chemical industries (IDCC 44)	EO not involved in CB but supports and advises its members	Yes	75	Regularly	Yes	No																											MEDEF	
FR	FEBEA	EO	Yes	LR	Yes	As above	Yes	18	Ad hoc	Yes	No																											MEDEF	
FR	FIPEC	EO	Yes	LR	Yes	As above	No	12	Ad hoc	Yes	No																											MEDEF	
FR	Ucaplast	EO	Yes	LR	n/a	As above	n/a	n/a	n/a	Yes	No																										CPME		
FR	SNCP	EO	Yes	LR	Yes	As above	Yes	6	n/a	Yes	No																										n/a		
FR	LEEM	EO	Yes	LR	Yes	As above	Yes	70	Regularly	Yes	No																											MEDEF	
FR	Polyvia	EO	Yes	LR	Yes, bipartite	Advises and supports affiliated companies participating in branch-level CB and SD	Yes	100	Ad hoc	Yes	No																											MEDEF and CPME	
FR	Plastalliance	EO	Yes	LR	Yes, bipartite	As above	Yes	n/a	n/a	Yes	No																											CPME	
FR	SIMV	EO	Yes	LR	Yes, bipartite	As above	Yes	n/a	n/a	Yes	No																											None	
FR	SIDIV	EO	Yes	LR	Yes, bipartite	As above	Yes	2	n/a	Yes	No																											MEDEF (via affiliation to Fédération des Industries de Santé)	
FR	Facophar Santé	EO	Yes	LR	Yes, bipartite	As above	Yes	2	n/a	Yes	No																											MEDEF	

Representativeness of the European social partner organisations: Chemical sector

Country	Abbreviation	EO or BA	Representative	LR/MR	Involved in bi- or tripartite SD in chemicals	Role in CB at company level	Involved in paritarian organisation	No. of staff	Consulted by government	Involved in CB at sector level	Involved in CB at company level	Parts of sector covered by CB										Members from company size group					Affiliation to cross-industry national EO/BA						
												20.1	21	22.1	22.2	22.22	Single-use plastic	20.2	20.3	20.4	20.5	20.6	Subcontractors	1-9 employees	10-49 employees	50-249 employees		250+ employees					
HR	HUP-UKI	EO	Yes	LR	Yes, indirectly	SEB, CEACIA supports company management in negotiations	No	4	Regularly	No	Indirectly by supporting negotiations																						Hrvatska udruga poslodavaca (Croatian Employers' Association)
HU	Mavesz	Both	Yes	MR	Yes	No role	No	3	Ad hoc	No	No	CA by EO members																					MGYOSZ
HU	MagyosZ	EO	Yes	MR	Yes, bipartite, Chemical Industrial SD Committee	Negotiating the CA signed by 7 companies in pharmaceuticals, but not considered company-level CB	Yes	3	Regularly	Only for 7 companies but not considered CB	Only for 7 companies, but not considered CB																						MGYOSZ
IE	BioPharma-Chem																																
IT	Federchimica	Both	Yes	LR + MR	Yes	Deals with sectorial IR; negotiates national CA with TUS; thus sets rules of CB at company level, advises and supports companies in correct implementation of national CA	Yes	107	Regularly	Yes	No																						Confindustria
IT	Farmindustria	Both	Yes		Yes	As above	Yes	n/a	Regularly	Yes	No																						Confindustria
LT	LChPIA																																
LT	LINPRA																																
LU	No factsheet																																
LV	Lakifa	Both	Yes	LR + MR	Yes	No role	Yes	3	Regularly	No	No	n/a																					Latvian Employers' Confederation n/a
MT	MEA	EO	Yes	LR	Yes, in both bipartite and tripartite CB	Can negotiate directly or advisory role only	No, but, where employees are unionised, MEA works with TU	5	Ad hoc	No	Yes																						
NL	VNCI	BA	Yes	LR	No	No	No	30	No	No	No	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	VNO-NCW
NL	AWVN																																

Representativeness of the European social partner organisations: Chemical sector

Country	Abbreviation	EO or BA	Representative	LR/MR	Involved in bi- or tripartite SD in chemicals	Role in CB at company level	Involved in paritarian organisation	No. of staff	Consulted by government	Involved in CB at sector level	Involved in CB at company level	Parts of sector covered by CB										Members from company size group					Affiliation to cross-industry national EO/BA			
												20.1	21	22.1	22.2	22.22	Single-use plastic	20.2	20.3	20.4	20.5	20.6	Subcontractors	1-9 employees	10-49 employees	50-249 employees		250+ employees		
NL	Federatie NRK	Branch organisation	Yes	LR	No	No	No	n/a	No	No	No												n/a	n/a	n/a	n/a	n/a	n/a	n/a	
NL	De VVVF	Branch organisation	Yes	LR																										
PL	PIPC	BA	Yes	MR	Yes, Tripartite Team for Chemical Industry	n/a	No	10	Regularly	No	No	n/a																		Polish Confederation of Private Employers (PKPP Lewiatan), Polish Chamber of Commerce (KIG)
PL	PZPPF	BA	n/a		Yes, Tripartite Team for Chemical Industry	n/a	No	n/a	Regularly	No	No																			PKPP Lewiatan, Business Centre Club (BCC), Union of Entrepreneurs and Employers
PT	APQuímica	Both	Yes	MR	No	n/a; only two affiliates sign SEBs	Yes	n/a	n/a	Yes	n/a																		CIP – Confederação Empresarial de Portugal	
PT	Apifarma	Both	Yes	MR	n/a	n/a	n/a	n/a	n/a	Yes	n/a																		CIP	
PT	APCAS	EO	Yes	MR	n/a	n/a	n/a	n/a	n/a	Yes	n/a																		None; APCAS's website mentions Groquifar (Association of Wholesalers of Chemical and Pharmaceutical Products) as affiliation	
PT	AIC	EO	Yes	MR	Probably not	n/a	Probably not	n/a	n/a; probably not	Yes	Probably not																			CIP
PT	AISDPCL	EO	Yes	MR	Probably not	n/a	Probably not	n/a	n/a; probably not	Yes	Probably not																			CIP
PT	ANIRP	EO	Yes	MR	Probably not	Probably none	Probably none	n/a	n/a; probably not	Yes	Probably not																			None
PT	APT	EO	Yes	MR	Probably not	Probably none	Probably not	n/a	n/a	Yes	Probably not																		No, APT does not mention affiliation to a national cross-sector EO/BA	
PT	APIP	EO	Yes	MR	Probably not	Probably none	Probably not	n/a	n/a; probably not	Yes	n/a; probably not																			CIP

Representativeness of the European social partner organisations: Chemical sector

Country	Abbreviation	EO or BA	Representative	LR/MR	Involved in bi- or tripartite SD in chemicals	Role in CB at company level	Involved in partisan organisation	No. of staff	Consulted by government	Involved in CB at sector level	Involved in CB at company level	Parts of sector covered by CB										Members from company size group					Affiliation to cross-industry national EO/BA							
												20.1	21	22.1	22.2	22.22	Single-use plastic	20.2	20.3	20.4	20.5	20.6	Subcontractors	1-9 employees	10-49 employees	50-249 employees		250+ employees						
PT	APIB	EO	Yes	MR	Probably not	Probably none	Probably not	n/a	n/a; probably not	Yes	n/a; probably not																							n/a; probably none
PT	Anipla	EO	Yes	MR	No	None	No	2	Ad hoc	Yes	No																						Association states it belongs to CIP, but is not mentioned in CIP member list	
RO	APDCR	BA	n/a; BAs have no representativeness criteria (EO do)		Advocacy for members linked to national and European authorities	No, BAs cannot negotiate, according to the law	No	1	Regularly	No (n/a)	No (n/a)																					No affiliation		
RO	Patronatul Confindustria	EO	No		No	Based on the online information, is more a supporting role	No	2	No	No	No																						n/a	
SE	IKEM	Both	Yes	MR	Yes	Limited role, probably advisory	No	30	Regularly	Yes	Yes																					Swedish Confederation of Enterprise		
SI	ACIS	EO	Yes	n/a	Yes, bipartite, partner in the negotiating group for chemical, rubber and plastic industry CA	Advising	No	3	Regularly	Yes	No																					Chamber of Commerce and Industry		
SI	ZDS	EO	Yes	n/a	Yes	Advising	No	13	Ad hoc	Yes	No																					None		
SK	ZCHFP	EO	Yes	LR	Yes	Advising, if needed	No	4	Regularly	Yes	Exceptionally																					AZZZ SR		

Notes: BA, business association; CA, collective agreement; CB, collective bargaining; CEO, chief executive officer; EO, employer organisation; LR, legal requirement; MR, mutual recognition; MS, Member State; n/a, no information available; SD, social dialogue; TU, trade union. No EO/BA in Ireland or Luxembourg. Cells shaded in green indicate 'yes'. The organisations shaded in blue are those that are affiliated to ECEG.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table A44: Reasons for organisational fragmentation and pluralism among employer organisations and business associations in the chemical sector, 2021

Country	No. of EOs/BAs in the country	Different organisations operate as BAs/EOs in the country	Organisations have members in different parts of the country	There are different organisations for different company sizes	Organisations have members in different parts of the sector	Organisations differ in ideology	Other reason
	TOTAL	2 CZ, RO	0	0	14 AT, BG, CY, CZ, DE, EE, EL, FR, HU, IT, LT, PL, PT, SI	1 IT	
AT	2						
BE	1	Only one EO/BA in the sector					
BG	2						
CY	11						
CZ	3						AIFP and CAFF are not involved in CB (they are BAs) and operate only in pharmaceuticals
DE	2						
DK	8						DI is the only organisation negotiating sectoral CB. BAs are cross-sectoral, covering specific value chains: plastics, medical gear
EE	3						
EL	3						
ES	1	Only one EO/BA in the sector					
FI	2	n/a					
FR	11						
HR	1	Only one EO/BA in the sector					
HU	3						
IE	1	Only one EO/BA in the sector					
IT	2						
LT	4						
LU	0	No EO/BA in the sector					
LV	1	Only one EO/BA in the sector					
MT	1	Only one EO/BA in the sector					
NL	2	n/a					
PL	2						
PT	10						
RO	3						
SE	1	Only one EO/BA in the sector					
SI	2						
SK	1	Only one EO/BA in the sector					

Notes: BA, business association; CB, collective bargaining; EO, employer organisation. Elements shaded in green indicate 'yes'.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Annex 5. National sectoral social dialogue and collective bargaining practices

Table A29 outlines the collective bargaining information on a country-by-country basis, illustrating the different national collective bargaining patterns. It indicates that in the vast majority of Member States (24) a combination of single-employer and multi-employer bargaining takes place in the chemical sector. The only exceptions are Ireland, where there is only single-employer bargaining, Greece, where there is no collective bargaining, and Estonia, for which the coverage rate could not be verified.

Table A45: Level of collective bargaining practices by Member State

Type of collective bargaining	Countries
Multi-employer	
Single-employer and multi-employer	AT, BE, BG, CY, CZ, DE, DK, ES, FI, FR, HR, HU, IT, LT, LU, LV, MT, NL, PL, PT, RO, SE, SI, SK
Single-employer	IE
None	EL (for the moment)

Note: No information available for Estonia.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table A30 combines the information related to the types of collective bargaining with the information on collective bargaining coverage rates in the chemical sector in each Member State. This shows that two-thirds of Member States have high collective bargaining coverage rates: eight Member States (Austria, Belgium, France, Hungary, Luxembourg, Portugal, Spain and Sweden) have coverage rates of more than 94%, while rates are also 75% or more in four countries (Italy, Malta, the Netherlands and Slovenia) and 50% or more in another four (Cyprus, Denmark, Finland and Germany).

Table A46: Coverage of national sectoral collective bargaining

Type of collective bargaining	Collective bargaining coverage						Information not available
	>94%	75–94%	50–74%	25–49%	1–24%	0%	
Multi-employer							
Single-employer and multi-employer	AT, BE, ES, FR, HU, LU, PT, SE	IT, MT, NL, SI	CY, DE, DK, FI	CZ, HR, LV, SK	BG, LT, PL, RO		
Single-employer				IE			
None						EL	EE

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table A47: National sectoral social dialogue bodies

Country	Name of the body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions represented	Employer organisations represented
	TOTAL: 26 bodies in 16 MSs					
BE	JC 116	Bipartite	Joint committee	Statutory	AC-CG, BBTK-SETCa, ACLVB-CGSLB, ACV BIE, CNE	Essenscia
BE	JC 207	Bipartite	Joint committee	Statutory	AC-CG, BBTK-SETCa, ACLVB-CGSLB, ACV BIE, CNE	Essenscia
BG	Industry Council/Advisory	Tripartite	Total	Statutory	n/a	n/a
BG	Industry Council	Tripartite	Working conditions	Statutory	n/a	n/a
DE	So.WIN	Bipartite	Further training of works council members on sustainability and the interrelation between economy, ecology and social affairs	Agreement; joint establish- ment of limited company	IGBCE	BAVC
DE	UCI	Bipartite	Joint fund supporting school leavers in finding an apprenticeship position	Agreement	IGBCE	BAVC
DK	BFA Industri (Trade Association of Industry)	Bipartite	Working environment council for manufacturing sector	Statutory	CO-industri; Dansk Metal; 3F Industri; HK Privat; Dansk El- Forbund; Fødevareforbundet NNF; Teknisk Landsforbund	DI (Dansk Industri); Grakom; Mediearbejdsgiverne; Lederne
ES	Controles de Alcohol y Drogas en las Empresas	Bipartite	Commission to control drug consumption in companies	Sectoral collective agreement of chemical industry (2021)	CCOO Industria and UGT-FICA	Feique
FI	The Centre for Occupational Safety's sectoral group in the chemical industry	Bipartite	Occupational safety	Probably agreement	YTN, Pro, Teollisuusliitto (and other trade unions that are not sector- related)	Chemical Industry Federation of Finland
FI	The Centre for Occupational Safety's sectoral group in the rubber and tyre sector	Bipartite	Occupational safety	Probably agreement	YTN, Pro, Teollisuusliitto	Rubber Manufacturers' Association of Finland; Autonrengasliitto Ry
FR	CPPNI (pharmaceutical industry)	Bipartite	National collective bargaining. Represents the sector vis-à-vis the public authorities	Statutory	FCE-CFDT; CFE-CGC Chimie; CMTE-CFTC; FNIC-CGT; FO Pharmacie; UNSA Industrie et construction	LEEM
FR	Commission paritaire nationale de l'emploi des industries de santé (pharmaceutical industry)	Bipartite	Employment and skills	Agreement	FCE-CFDT; CFE-CGC Chimie; CMTE-CFTC; FNIC-CGT; FO Pharmacie; UNSA Industrie et construction	LEEM
FR	Comité paritaire de gestion du régime prévoyance et frais de	Bipartite	Supplementary social security benefits	n/a	FCE-CFDT; CFE-CGC Chimie; CMTE-CFTC; FNIC-CGT; FO	LEEM

Representativeness of the European social partner organisations: Chemical sector

	santé de la branche (pharmaceutical industry)				Pharmacie; UNSA Industrie et construction	
FR	Commission paritaire permanente de négociation et d'interprétation (chemical industry)	Bipartite	National collective bargaining. Represents the sector, vis-à-vis the public authorities	Statutory	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	France chimie; FEBEA; FIPEC
FR	Commission paritaire nationale d'interprétation (chemical industry)	Bipartite	Collective bargaining	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	France chimie; FEBEA; FIPEC
FR	Commission paritaire nationale pour l'emploi (chemical industry)	Bipartite	Employment and skills	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	France chimie; FEBEA; FIPEC
FR	Commission nationale paritaire des conditions de travail, hygiène et sécurité des industries chimiques (chemical industry)	Bipartite	Health and safety	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	France chimie; FEBEA; FIPEC
FR	Comité Diversité	Bipartite	Diversity	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	France chimie; FEBEA; FIPEC
FR	Comité de suivi PEI Percoi	Bipartite	Financial saving plan	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	France chimie; FEBEA; FIPEC
FR	Comité de suivi Temps de travail	Bipartite	Working time	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	France chimie; FEBEA; FIPEC
FR	Observatoire national de l'évolution des emplois du caoutchouc	Bipartite	Employment and skills (studies)	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	SNCP; Ucaplast
FR	Observatoire prospectif des métiers, des qualifications et de la diversité des industries chimiques	Bipartite	Employment and skills (studies)	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	France chimie; FEBEA; FIPEC
FR	Observatoire des métiers, de l'emploi et de la formation des entreprises du médicament	Bipartite	Employment and skills (studies)	Agreement	FCE-CFDT; CFE-CGC Chimie; CMTE-CFTC; FNIC-CGT; FO Pharmacie; UNSA Industrie et construction	LEEM
FR	Observatoire national paritaire prospectif des métiers, des emplois et des qualifications de la plasturgie	Bipartite	Employment and skills (studies)	Agreement	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	Polyvia; Plastalliance
FR	CPNE (plastics industry)	Bipartite	n/a	n/a	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	Polyvia; Plastalliance
FR	CPNE (rubber)	Bipartite	n/a	n/a	FCE-CFDT; FNIC-CGT; CFE-CGC Chimie; FO fédéchimie	SNCP; Ucaplast
HU	Chemical Industrial Social Dialogue Committee	Bipartite	Social dialogue on topics concerning workers in the	Statutory	VDSZ (representative)	Mavesz (representative); Magyosz (not

Representativeness of the European social partner organisations: Chemical sector

			chemical sector (NACE 20, 21, 22 and also NACE 1920)			representative nationally, but meets requirements for Chemical Industrial SD Committee)
LV	National Tripartite Cooperation Council	Tripartite	Highest-level tripartite social dialogue body	Statutory	The Free Trade Union Confederation of Latvia	Latvian Employers Confederation
MT	Malta Council for Economic and Social Development	Tripartite	Advisory council to the Maltese government	Statutory	GWU; Union of United Workers (UHM); Forum Unions Maltin (For.U.M.); Confederation of Malta Trade Unions	MEA; Malta Chamber of Commerce, Enterprise and Industry; Malta Hotels and Restaurants Association; Malta Chamber of Small and Medium Enterprises
NL	Stichting van de Arbeid	Bipartite	National-level negotiation forum and advisory organisation	Appears to be agreement	CNV, FNV, VCP	VNO-NCW, LTO
PL	Tripartite Team for Chemical Industry	Tripartite	Climate protection regulations (CO ₂ limits), restructuring, bridging pensions for chemical sector employees, etc.	Statutory	OPZZ, NSZZ „Solidarność”, Forum Związków Zawodowych	PIPC, Business Centre Club, Polish Confederation Lewiatan
RO	Sectoral Committee for Chemical and Petrochemical Sector	Bipartite	Professional standards, working conditions	Statutory	FSLPC	FEPACHIM
SI	Negotiating group for chemical, rubber and plastic industry CA	Bipartite	Sectoral CA (pay, working time, training, apprenticeship, annual leave)	Agreement	ZSSS-KNG; SKGIPS-KS-90; Independence KNSS	ACIS; ZDS
SK	Economic and Social Council	Tripartite	Usually legislation/regulation related to business and employment issues	Statutory	ECHOZ via membership of KOZ SR	ZCHFP SR via membership of AZZZ SR

Notes: There are no bipartite or tripartite bodies in Austria, Croatia, Cyprus, Czechia, Estonia, Greece, Ireland, Lithuania, Luxembourg or Portugal, while only informal tri- and bipartite social dialogue settings operate in Sweden. The organisations marked in red are not represented in the European SSDC for the chemical sector. The green cells show the structures in which there is a TU involved that is affiliated to industriAll Europe; the blue cells indicate that there is an EO affiliated to ECEG.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table A48: National paritarian organisations in the chemical sector

MS	Name of the organisation	Scope	Trade union(s) involved	Employer organisation(s) involved
	TOTAL: 27 bodies in 15 MSs			
AT	Arbitration office	n/a		
BE	Social Fund for the Chemical Industry	Social fund	AC-CG, BBTK-SETCa, ACLVB-CGSLB, ACV BIE, CNE	Essenscia
BE	Demographic security fund for workers in the chemicals, plastics and life sciences sector	Social security fund	AC-CG, BBTK-SETCa, ACLVB-CGSLB, ACV BIE, CNE	Essenscia
BE	Social security fund for the sectoral pension scheme for chemical industry workers	Social security fund	AC-CG, BBTK-SETCa, ACLVB-CGSLB, ACV BIE, CNE	Essenscia
BE	Fund for the vocational training of white-collar workers in the chemical industry (Co-valent)	Training fund	AC-CG, BBTK-SETCa, ACLVB-CGSLB, ACV BIE, CNE	Essenscia
BE	Social security fund for the sectoral pension scheme for white-collar workers in the chemical industry	Social security fund	AC-CG, BBTK-SETCa, ACLVB-CGSLB, ACV BIE, CNE	Essenscia
BE	Social fund for white-collar workers in the chemical industry	Social security fund	AC-CG, BBTK-SETCa, ACLVB-CGSLB, ACV BIE, CNE	Essenscia
CZ	Sectoral agreement for chemical industry – youth for chemical industry	Attracting youth to study chemistry	OS ECHO	SCHP ČR
CZ	Sectoral agreement for chemical industry – social dialogue as a way to support employment	Workshops and analyses	OS ECHO	SCHP ČR
DE	So.WIN	Training of worker representatives	IGBCE	BAVC
DE	Unterstützungsverein Chemische Industrie	Joint fund supporting finding apprenticeships	IGBCE	BAVC
DE	Code of Ethics	Codes of conduct for chemical industry	IGBCE	BAVC
DK	Industriens uddannelser	Vocational training	Many trade unions involved, including 3F, Dansk Metal and CO-industri	DI
DK	Industriens Kompetence-udviklingsfond	Vocational training fund	CO-industri	DI
DK	Industriens pension	Labour market pension scheme	CO-industri	DI
EL	Special Fund for Employment and Vocational Training	Fund for training of SME staff	GSEE	SEV; GSEVEE; ESEE; SETE
ES	Previsión social complementaria	Overseeing progress of sectoral pension fund	CCOO Industria, UGT-FICA	Feique
ES	La Comisión Paritaria Sectorial por la Igualdad de Oportunidades	Evaluating implementation of equality plans	CCOO Industria, UGT-FICA	Feique
FI	Hyvää Huomista	Well-being at the workplace	YTN, Pro, Teollisuusliitto	Chemical Industry Federation of Finland
FR	OPCO2i	Vocational training	FCE-CFDT; CFE-CGC Chimie; CMTE-CFTC; FNIC-CGT; FO Pharmacie; UNSA Industrie et construction	SNCP; Ucaplast; Polyvia; Plastalliance; France chimie; FEBEA; FIPEC; LEEM
HU	Sectoral Skill Council Chemistry	Training	VDSZ	Magyosoz
IT	Fonchim	Integrated pension fund for chemical and pharmaceutical sector	FILCTEM CGIL, FE, MCA CISLA, UILTEC UIL	Federchimica; Farindustria
IT	Organismo Bilaterale Chimico	Continuous training at company level	FILCTEM CGIL, FE, MCA CISLA, UILTEC UIL, UGL-Chimici, Fail-Confail, Fialc-Cisal	Federchimica; Farindustria
LV	Sectoral experts' council (chemicals)	Efficiency and quality of vocational education	LIA	Lakīfa
NL	Opleidingsfonds Procesindustrie	Stimulating training and learning, supporting older workers	FNV, CNV	AWVN; FNCI
PT	Petrochemicals, Industrial Chemicals and Refining Competitiveness Cluster	Encouraging competitiveness in these sectors	No union involved, focused on business and not on labour relations	APQuímica

Representativeness of the European social partner organisations: Chemical sector

SI	Sectoral competence centre	Raising skills levels, especially in professions facing skills shortages	ZSSS-KNG	ACIS
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Notes: No paritarian organisations in Bulgaria, Croatia, Cyprus, Estonia, Ireland, Lithuania, Luxembourg, Malta, Poland, Romania, Slovakia or Sweden. The organisations marked in red are not represented in the European SSDC for the chemical sector. The green cells show the structures in which there is a trade union involved that is affiliated to industriAll Europe; the blue cells indicate that there is an employer organisation affiliated to ECEG.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table A49: Consultation of employers and trade unions, by country

	Trade unions consulted	No trade unions consulted
Employer organisations/business associations consulted	Regularly: BE, CY, CZ, DK, EL, FR, IT, LV, PL, SE, SI, SK Ad hoc: AT, DE, ES, FI, MT	BG, HR, HU, IE,* LT,* LU,* RO
No employer organisations/business associations consulted	EE, NL	PT (probably not)

Notes: * No employer organisation/business association information for Ireland, Lithuania or Luxembourg.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Annex 6. Achievements of the ESSDC

Table A50: List of joint opinions in the chemical sector

Date	Title (joint opinions)	IndustriAll Europe (before 2012, EMCEF)	ECEG	CEFIC
19 February 2003	Memorandum of understanding on responsible care			
27 November 2003	Joint statement on the new European chemicals policy			
10 September 2004	Joint position paper on education, vocational training and lifelong learning in the European chemical industry			
27 September 2004	Joint declaration on the establishment of a formalised Sector Social Dialogue Committee for the European chemical industry			
14 December 2004	Rules of procedure for the European Sector Social Dialogue Committee of the chemical industry			
1 June 2005	Joint position on REACH			
26 October 2006	Skills, education and training needs for chemical businesses			
15 May 2008	Joint lessons learned on restructuring, managing change, competitiveness and employment			
29 September 2008	Joint statement on the European Union emission trading scheme			
29 September 2008	Working in partnership through responsible care			
2 March 2009	Joint declaration of the Working Group on Education, Training and Lifelong Learning			
13 May 2009	Joint opinion on the global economic crisis			
31 January 2011	General remarks on the Green Paper 'Towards adequate sustainable and safe European pension systems' of the European Commission			
15 April 2011	European framework agreement on competence profiles for process operators and first line supervisors in the chemical industry			


Representativeness of the European social partner organisations: Chemical sector

20 March 2012	Joint statement on the proposal of 22 June 2011 for a directive on energy efficiency			
6 December 2013	Joint declaration on the Commission Green Paper 'A 2030 framework for climate and energy policies'			
30 September 2014	Joint declaration on REACH and the inclusion of nanomaterials in its annexes			
31 March 2015	Joint letter on the scope of the Sectoral Social Dialogue Committee for the European Chemical industry			
14 October 2015	European chemical social partners roadmap 2015–2020			
14 October 2015	Addendum to the European framework agreement on competence profiles for process operators and first line supervisors			
26 November 2015	Common position on energy and climate policy ahead of the 21st conference of the parties (COP21) of the United Nations Framework Convention on Climate Change			
8 December 2015	Joint declaration on EU OSH directives			
22 November 2016	Joint position on social and employment-related aspects of digitalisation			
24 February 2017	VinylPlus cooperation agreement			
24 February 2017	Joint declaration by social partners of the chemical sector and CEFIC on the review of the Carcinogens and Mutagens Directive			
13 June 2017	Framework of action on sustainable employment and career development			
13 June 2017	Memorandum of understanding on responsible care			
13 June 2017	Joint declaration on Brexit			
8 December 2017	Social partners' reflection on interplay between REACH and OSH			
16 October 2018	Joint declaration on the legal framework to manage risks related to the use of reprotoxic substances at the workplace			
8 November 2019	Joint recommendations on digital transformations in the workplace for the European chemicals, pharmaceuticals, rubber and plastics sectors			

Representativeness of the European social partner organisations: Chemical sector

17 July 2020	Joint recommendations on safe and healthy workplaces in the chemical, pharmaceutical, plastics and rubber industries in times of COVID-19			
27 October 2020	Joint statement of the European social partners in the chemical, pharmaceutical, rubber and plastics industries, on the chemical strategy for sustainability			
15 March 2021	Toolbox of good practices in the European chemical, pharmaceutical, rubber and plastics industries			
13 May 2022	Europe needs to make its STEM strategy a reality now			
2 March 2023	Joint statement on the impact of the energy crisis on the EU chemical industry			
20 March 2024	Europe needs to make its STEM strategy a reality now (updated version with the Council of European Employers of the Metal, Engineering and Technology-based Industries)			
15 May 2024	A European Industrial Deal focused on ensuring quality industrial jobs in Europe			

Annex 7. Country profiles ordered by the importance of the chemical sector in the country

GERMANY 	People employed in the chemical sector (NACE 20, 21 and 22; source: LFS 2021)	Proportion of the German workforce employed in the chemical sector (LFS, 2021)	Proportion of the EU workforce (total 182.8 million workers in 2021)	Number of companies in the chemical sector
	887,200 (NACE 20, 21 and 22)	2.21%	0.485%	11,728 (2020 SBS data)

1 representative sectoral trade union	IG BCE is the only trade union in Germany involved in sectoral collective bargaining and in sectoral social dialogue structures. Based on mutual recognition and through its involvement in collective bargaining at sectoral level, IG BCE is also considered representative for the chemical sector. CGBCE is the Christian Union of Mining, Chemicals and Energy Workers, and has an unknown number of members in the sector.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
IG BCE	600,000	Stable	All	Yes	MEB, SEB	IndustriAll Europe	The only trade union involved in sectoral collective bargaining and in sectoral social dialogue structures is IG BCE, which is affiliated to industriAll Europe.
CGBCE	n/a	n/a	n/a	No	No	(CESI, indirect membership via CGB)	


Colour code: the organisation marked in yellow has some members in the sector but is not considered a representative social partner organisation.

2 employer organisations	There are two chemical sectoral employer organisations in the chemical sector. BAVC is the most representative, in terms of its membership strength, and in its involvement in sectoral collective bargaining and social dialogue structures. ADK has fewer member companies and is also involved in collective bargaining on only an ad hoc basis.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG

Representativeness of the European social partner organisations: Chemical sector

BAVC	~1,830	580,000 (65%)	Stable	Entire sector	Yes	Yes	ECEG	The most representative employer organisation, and the only one involved in sectoral collective bargaining and social dialogue structures, is affiliated to ECEG.
ADK	160	75,000 (8%)	Increasing	Rubber and plastics	Yes	Ad hoc		

Representativeness of the European social partner organisations: Chemical sector

BELGIUM 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU workforce	Number of companies in the chemical sector
	109,700 (LFS, 2021)	2.26%	0.059%	1,653 (2020 SBS data)


5 representative sectoral trade unions	All five of Belgium's affiliated trade unions listed below are involved in sectoral collective bargaining and in sectoral social dialogue structures, and are regularly consulted by the government. They are thus considered representative for the chemical sector.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
BBTK-SETCa	28,500	n/a	Entire sector	Yes	MEB	IndustriAll Europe	All five trade unions affiliated to industriAll Europe are involved in both sectoral collective bargaining and company-level collective bargaining, with the exception of BBTK-SETCa, which is only involved in sectoral collective bargaining.
AC-CG	28,500	n/a	Entire sector	Yes	MEB, SEB	IndustriAll Europe	
ACV-CSC BIE	30,036	n/a	Entire sector	Yes	MEB, SEB	IndustriAll Europe	
ACV-CSC CNE	n/a	n/a	n/a	Yes	MEB, SEB	IndustriAll Europe	
ACLVB-CGSLB	n/a	n/a	n/a	Yes	MEB, SEB	IndustriAll Europe	
ACV-CSC Puls (formerly LBC-NVK)	n/a	n/a					

1 employer organisation	There is one sectoral employer organisation in the chemical sector in Belgium, Essenscia. It is representative, in terms of its involvement in sectoral collective bargaining and social dialogue structures.
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Representativeness of the European social partner organisations: Chemical sector

	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
Essenscia	720	n/a	n/a	Entire sector	Yes	MEB	ECEG	Essenscia is involved in sectoral collective bargaining and is affiliated to ECEG and CEFIC. The employer organisation is not involved in company-level bargaining but supports members as necessary.


Representativeness of the European social partner organisations: Chemical sector

CZECHIA 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU workforce	Number of companies in the chemical sector
	143,000 (LFS, 2021)	2.82%	0.078%	5,451 (2020 SBS data)

2 representative sectoral trade unions	OS ECHO is the only trade union in Czechia involved in sectoral collective bargaining and in sectoral social dialogue structures. Based on membership strength, mutual recognition and its involvement in collective bargaining at sectoral level, OS ECHO is considered representative for the chemical sector. ROSa is considered representative as the second largest TU in the sector but does not participate in collective bargaining.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
OS ECHO	3,800	Decreased	Partial	Yes	MEB	IndustriAll Europe, EPSU	The only trade union involved in sectoral collective bargaining and in sectoral social dialogue structures is OS ECHO, which is affiliated to industriAll Europe.
ROSa	1,000	Stable	Partial	Yes	No		

1 employer organisation	There is only one chemical sectoral employer organisation in Czechia's chemical sector, and it is representative, in terms of its membership strength and its involvement in sectoral collective bargaining.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
SCHP ČR	136	20%	Increased	Partial	Yes	MEB	CEFIC	The most representative employer organisation, and the only one involved in sectoral collective bargaining, is not affiliated to ECEG.

Representativeness of the European social partner organisations: Chemical sector

FRANCE 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU workforce	Number of companies in the chemical sector
	247,800 (LFS, 2021)	0.91%	0.135%	6,705 (2020 SBS data)

8 representative sectoral trade unions	All eight trade unions listed below are involved in sectoral collective bargaining in France. Based on their involvement in collective bargaining at sectoral level, and their membership (covering the largest seven trade unions in the sector), they are considered representative for the entire chemical sector or for parts of the sector.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
CFE-CGC Chimie	7,300	Stable	All	Yes	MEB, SEB	IndustriAll Europe, FECCIA	The first (FCE-CFDT), second (FNIC-CGT) and third (CFE-CGC Chimie) largest trade unions involved in sectoral collective bargaining and in sectoral social dialogue structures are affiliated to industriAll Europe.
CFTC-CMTE	n/a	Stable	All	Yes	MEB and SEB in pharmaceuticals	IndustriAll Europe	
Fédéchimie FO	n/a	n/a	All (except NACE 21)	Yes	MEB, SEB	IndustriAll Europe	
FO Pharmacie	n/a	n/a	Only NACE 21	Yes, in pharmaceuticals	MEB and SEB in pharmaceuticals		
FCE-CFDT	40,000	n/a	All	Yes	MEB, SEB	IndustriAll Europe	
FNIC-CGT	n/a	n/a	All	Yes	MEB, SEB	IndustriAll Europe	
UNSA Industrie et Construction	n/a	n/a	Only NACE 21	Yes, in pharmaceuticals	MEB and SEB in pharmaceuticals		
SUD Chimie Pharma	1,300–1,400	Increased	Only NACE 22.1	Yes, in rubber branch	MEB and SEB in rubber		


Representativeness of the European social partner organisations: Chemical sector

11 employer organisations	All 11 employer organisation listed below are involved in sectoral collective bargaining. They are not involved in company-level bargaining but they have a support and advisory role for their members.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
France chimie	960	60%	Decreased	Part of sector	Yes	Yes	ECEG	France chimie is the largest in the chemical branch and is the only EO affiliated to ECEG (and CEFIC).
FEBEA	216	23%	n/a	Part of sector	Yes	Yes		
FIPEC	324 or 140	16.49% of chemical branch	n/a	Part of sector	Yes	Yes		
Ucaplast	63	8.41% of rubber branch	Stable	Part of sector	Yes	Yes		
SNCP	60 or 120	91.59% of rubber branch	n/a	Part of sector	Yes	Yes	ETRMA	
LEEM	264	100%	n/a	Part of sector	Yes	Yes	EFPIA	
Polyvia	843 or 3,500	88.24% of plastic branch	n/a	Part of sector	Yes	Yes		
Plastalliance	172	11.76% of plastic branch	n/a	Part of sector	Yes	Yes		
SIMV	41 or 38	7,407 employees	n/a	Part of sector	Yes	Yes		

Representativeness of the European social partner organisations: Chemical sector

SIDIV	100	n/a	n/a	Part of sector	Yes	Yes		
Facophar Santé	17	1,527 employees	n/a	Part of sector	Yes	Yes		

Representativeness of the European social partner organisations: Chemical sector

HUNGARY 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU workforce	Number of companies in the chemical sector
	121,000 (LFS, 2021)	2.7%	0.066%	2,585 (2020 SBS data)

1 representative sectoral trade union	VDSZ is the largest trade union in Hungary involved in sectoral collective bargaining and in sectoral social dialogue structures. VDSZ Pharma is not considered representative for the chemical sector.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
VDSZ	20,100	Decreased	All	Yes	Only by 7 companies	IndustriAll	The largest trade union (VDSZ) is affiliated to industriAll Europe. There is no sector-level collective bargaining, only sectoral social dialogue between VDSZ and Mavesz. Co-signing of agreements takes place for 7 companies, but these company agreements are not understood as sectoral CB.
VDSZ Pharma	8,736	Increased	Partial	No	No	Indirectly affiliated to industriAll through VDSZ	


Colour code: the organisation marked in yellow has some members in the sector but is not considered a representative social partner organisation.

2 employer organisations	There are two chemical sectoral employer organisations in Hungary's chemical sector. Mavesz is the more representative, in terms of its sector coverage, membership strength and involvement in sectoral collective bargaining and social dialogue structures. Magyosoz operates in the pharmaceutical sector; it is not representative nationally, but meets the requirements for the Chemical Industrial SD Committee.*							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG

Representativeness of the European social partner organisations: Chemical sector

Mavesz	54	50%	Increased	Partial	Yes	No	ECEG, CEFIC	The only representative employer organisation involved in collective bargaining (Mavesz) is affiliated to ECEG. There is no sector-level collective bargaining, only sectoral social dialogue between Mavesz and VDSZ. Co-signing of agreements takes place for 7 companies, but these company agreements are not understood as sectoral CB.
Magyos	19	80% of pharma	Stable	Partial	* See above	No		

Representativeness of the European social partner organisations: Chemical sector

ITALY 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU workforce	Number of companies in the chemical sector
	425,300 (LFS, 2021)	1.9%	0.232%	13,988 (2020 SBS data)


3 representative sectoral trade unions	All three trade unions listed in Italy are involved in sectoral collective bargaining and in bargaining at company level. All three are part of paritarian organisations. UILTEC UIL has an unknown number of members in the sector.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
FILCTEM CGIL	216,000	Stable	All	Yes	SEB, MEB	IndustriAll Europe	All three trade unions are involved in sectoral collective bargaining and bargaining at company level, and all three are affiliated to industriAll Europe.
FEMCA CISL	58,000	Stable	All	Yes	SEB, MEB	IndustriAll Europe	
UILTEC UIL	n/a	Stable	All	Yes	SEB, MEB	IndustriAll Europe	

2 employer organisations	There are two chemical sectoral employer organisations in Italy's chemical sector. Federchimica is the more representative in terms of its membership strength, deals with sectorial industrial relations and negotiates the national collective agreement. In this role, it advises and supports the companies in the correct application of the national collective agreement. Neither Federchimica nor Farindustria is involved in bargaining at company level.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG

Representativeness of the European social partner organisations: Chemical sector

Federchimica	1,421	90%	Increased	Partial	Yes	Yes	ECEG, CEFIC	The more representative employer organisation, and the only one involved in sectoral collective bargaining and social dialogue structures, is affiliated to ECEG.
Farindustria	200	10%	Stable	Partial	Yes	Yes	EIFPA	

Representativeness of the European social partner organisations: Chemical sector

POLAND 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU workforce	Number of companies in the chemical sector
	370,500 (LFS, 2021)	2.3%	0.203%	12,612 (2020 SBS data)

5 representative sectoral trade unions	All five trade unions listed participate in tripartite social dialogue related to the chemical sector. They do not participate in collective bargaining at sectoral level but they do participate in collective bargaining at company level. They are considered representative for the chemical sector. * PZZ "Kadra" is not considered representative for the chemical sector but is considered representative as the union affiliated to FZZ, the cross-sectoral federation.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
SPCH NSZZ "Solidarność"	10,469	Decreased	Partial	Yes	Yes	IndustriAll, ETUC	SPCH NSZZ "Solidarność" (the largest trade union in Poland) and PZZ "Kadra" (not one of the three largest) are affiliated to industriAll Europe.
PZZ "Kadra"	500	Increased	Partial	* See above	Yes	IndustriAll, ETUC	
ZZIT	n/a	n/a	Partial	Yes	Yes		
OZZZPRC	2,200	Increased	Partial	Yes	Yes		
FZZPChSziC	n/a	n/a	Partial	Yes	Yes		


Colour code: the organisation marked in yellow has some members in the sector but is not considered a representative social partner organisation.

2 employer organisations	There are two sectoral employer organisations in the chemical sector. PIPC is the larger and more representative, in terms of its membership strength. PSPPF, in the pharmaceutical sector, is the second largest organisation in Poland, but not enough information has been provided on representativeness. Both organisations are involved in tripartite social dialogue.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG

Representativeness of the European social partner organisations: Chemical sector

PIPC	142	n/a	n/a	Partial	Yes	Yes, tripartite	ECEG, CEFIC	The larger and more representative employer organisation (PIPC) is affiliated to ECEG.
PZPPF	n/a	n/a	n/a	Partial (pharmaceuticals)	n/a	Yes, tripartite		

Representativeness of the European social partner organisations: Chemical sector

ROMANIA 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU workforce	Number of companies in the chemical sector
	96,100 (LFS, 2021)	1.3%	0.053%	4,012 (2020 SBS data)


2 representative sectoral trade unions	FSLCP is the largest trade union in Romania, and is the founder of the bipartite sectoral social dialogue committee. Both FSLCP and FLE are representative. They are not involved in collective bargaining at sector level but they are involved in collective bargaining at company level.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
FSLCP	7,140	Decreased	Partial	Yes	SEB	IndustriAll Europe	FSLCP is the largest trade union and is affiliated to industriAll Europe. FLE is the second largest trade union and is affiliated to industriAll Europe through Uniunea Federativă Sindicală "ATLAS".
FLE	2,300	Decreased	Partial	Yes	SEB	IndustriAll Europe	

2 employer organisations	APDCR is a business association in Romania's chemical sector. Given that, representativeness criteria do not apply. It is consulted by the government and is involved in advocacy activities for its member companies in relation to national and European authorities but cannot be involved in collective bargaining according to the law.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
APDCR	18		Increased	Partial	n/a, as there are no representativeness criteria for business associations		CEFIC	APDCR is a business association, cannot be considered representative and is not affiliated to ECEG.

Representativeness of the European social partner organisations: Chemical sector

Patronatul Confindustria Romania	1		n/a	Partial	No			
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Representativeness of the European social partner organisations: Chemical sector


SPAIN 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU sectoral workforce	Number of companies in the chemical sector
	303,700 (LFS, 2021)	1.6%	8.5%	8,094 (2020 SBS data)

3 representative sectoral trade unions	CCOO Industria and UGT-FICA are the two trade unions in Spain involved in sectoral collective bargaining and in sectoral social dialogue structures, together covering almost 100% of the sectoral workforce. ELA is also considered representative but only for the Basque Country.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
CCOO Industria	18,916	Increased	Partial	Yes	MEB, SEB	IndustriAll Europe, UNI Global Union	CCOO Industria, UGT-FICA and ELA in the Basque Country are considered representative. Four of the five trade unions (except FESIQ-CGT) are affiliated to industriAll Europe.
UGT-FICA	n/a	Stable	Partial	Yes	MEB, SEB	IndustriAll Europe, UNI Global Union	
ELA	2,668	Increased	Partial	Yes	SEB	IndustriAll Europe	
FI-USO	n/a	n/a	Partial	n/a	SEB	IndustriAll Europe	
FESIQ-CGT	n/a	n/a	Partial	n/a	SEB	n/a	

Colour code: the organisations marked in yellow have some members in the sector but are not considered representative social partner organisations.

1 employer organisation	Feique is the only sectoral employer organisations in the chemical sector in Spain, and is involved in sectoral collective bargaining and social dialogue structures.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
Feique	1,500	8.8%	Increased	All	Yes	MEB	ECEG, CEFIC	The only employer organisation is representative and is affiliated to ECEG.


Representativeness of the European social partner organisations: Chemical sector

NETHERLANDS 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the workforce employed in the chemical sector	Proportion of the EU sectoral workforce	Number of companies in the chemical sector
	100,600 (LFS, 2021)	1.1%	2.8%	2,787 (2020 SBS data)

3 representative sectoral trade unions	FNV and CNV are, respectively, the largest and second largest trade unions in the chemical sector of the country. They are both involved in collective bargaining at company level. Based on mutual recognition, FNV and CNV are considered representative for the chemical sector, while De Unie is active in all sectors of economic activity.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
FNV	20%	Decreased	Partial	Yes	SEB	IndustriAll Europe, ETUC	Both FNV and CNV are involved in sectoral collective bargaining and in sectoral social dialogue structures, and are affiliated to industriAll Europe.
De Unie	n/a	n/a	Partial	Yes	MEB, SEB	n/a	
CNV	10% (20,000)	Stable	Partial	Yes	SEB	IndustriAll Europe	

3 employer organisations	There are three relevant sectoral employer organisations in the country's chemical sector. VNCI is the most representative, in terms of its membership strength and its involvement in social dialogue structures. These organisations are not involved in collective bargaining.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
VNCI	100	n/a	Increased	Partial	Yes	No	CEFIC	The most representative employer organisation is VNCI. However, it is not involved in sectoral collective bargaining and is not affiliated to ECEG.
Federatie NRK	400 (plastics and rubber)	n/a	n/a	Partial	Yes	No	n/a	
De VVVF	90% of paint and printing ink manufacturers	n/a	n/a	Partial	Yes	No	EFPIA	


Representativeness of the European social partner organisations: Chemical sector

AUSTRIA 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU sectoral workforce	Number of companies in the chemical sector
	73,200 (LFS, 2021)	1.7%	2.1%	1,151 (2020 SBS data)

2 representative sectoral trade unions	PRO-GE and GPA are, respectively, the largest and second largest trade unions in Austria's chemical sector, and they are both involved in sectoral collective bargaining. Based on mutual recognition and the right to conclude collective agreements, both trade unions are considered representative for the chemical sector.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
PRO-GE	12,000	Stable	Full	Yes	MEB	IndustriAll Europe	Both PRO-GE (largest trade union) and GPA (second largest) are affiliated to industriAll Europe and are involved in bipartite and tripartite social dialogue related to the chemical sector.
GPA	n/a	Increased	Full	Yes	MEB	IndustriAll Europe	

2 employer organisations	There are two chemical sectoral employer organisations in Austria: FCIO is the more representative, in terms of its membership strength, and in its involvement in sectoral collective bargaining and social dialogue structures. BICG is the second largest employer organisation.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
FCIO	306	80%	Stable	Full	Yes	MEB	ECEG, CEFIC, EFPIA	The most representative employer organisation (FCIO) is affiliated to ECEG.
BICG	1024	20%	Increased	Partial	Yes	MEB		


Representativeness of the European social partner organisations: Chemical sector

SLOVAKIA 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU sectoral workforce	Number of companies in the chemical sector
	60,700 (LFS, 2021)	2.4%	1.7%	2,328 (2020 SBS data)

2 representative sectoral trade unions	ECHOZ is the largest trade union in Slovakia involved in sectoral collective bargaining, while AZCHFP SR is the second largest. Both are recognised as representative for the chemical sector, based on legal requirements, and they are involved in collective bargaining at both sector and company levels.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
ECHOZ	8,700	Decreased	Partial	Yes	MEB, SEB	IndustriAll Europe, EPSU	The largest trade union involved in sectoral collective bargaining and in sectoral social dialogue structures in the country is ECHOZ, which is affiliated to industriAll Europe.
AZCHFP SR	660	Decreased	Partial	Yes	MEB, SEB		

1 employer organisation	There is only one chemical sectoral employer organisation in Slovakia. ZCHFP is representative, in terms of its membership strength and its involvement in sectoral collective bargaining and social dialogue structures, and is also consulted by the government on sector-related matters.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
ZCHFP	45	35%	increased	Full	Yes	MEB, SEB	ECEG,	The only existing employer organisation is affiliated to ECEG.


Representativeness of the European social partner organisations: Chemical sector

IRELAND 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU sectoral workforce	Number of companies in the chemical sector
	59,100 (LFS, 2021)	2.6%	1.7%	473 (2020 SBS data)

2 representative sectoral trade unions	SIPTU is the largest trade union in Ireland involved in collective bargaining at company level, and Connect is the second largest. Based on mutual recognition, both are considered representative for the chemical sector.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
SIPTU	>5,000	Stable	Partial	Yes	SEB	IndustriAll Europe, UNI Europa	SIPTU, the largest trade union involved in collective bargaining, is affiliated to industriAll Europe.
Connect	1,000	Stable	Partial	Yes	SEB		

1 employer organisation	BioPharmaChem is a division of the main employers' body, Ibec, representing the interests of employers in the pharmaceutical sector in Ireland, but it is not involved in collective bargaining and is not affiliated to any European body. It did not provide information for this study.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
BioPharmaChem								

Representativeness of the European social partner organisations: Chemical sector

DENMARK 	People employed in the chemical sector (NACE 20, 21 and 22)	Proportion of the country's workforce employed in the chemical sector	Proportion of the EU sectoral workforce	Number of companies in the chemical sector
	55,700 (LFS, 2021)	2.0%	1.6%	927 (2020 SBS data)

2 representative sectoral trade unions	CO-industri is the largest trade union in Denmark involved in collective bargaining at sectoral level based on mutual recognition. IDA is a trade union for engineers, its members amount to around 10% of the chemical sectoral workforce and it is involved in a small number of company-level collective agreements in the chemical sector.						
	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of industriAll Europe
CO-industri	11,000	Stable	Partial	Yes	MEB	IndustriAll Europe, EFFAT, EFBWW	CO-industri is the largest trade union in Denmark involved in sectoral collective bargaining and is affiliated to industriAll Europe. IDA is also affiliated to industriAll Europe.
IDA	5,185	n/a	Partial	Yes	SEB	IndustriAll Europe, FEANI	

1 employer organisation	DI is the largest sectoral employer organisations in Denmark's chemical sector involved in sectoral social dialogue and is considered representative on the basis of mutual recognition. Plastindustrien is the largest business association in plastics. It is a member association of DI but, as a business association, is not directly involved in collective bargaining.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of ECEG
DI	62	Probably below 60%	Stable	n.a.	Yes	MEB	ECEG	DI is the largest representative employer organisation in Denmark involved in sectoral collective bargaining and social dialogue structures, is affiliated to ECEG and is involved in ECEG's management structures.
Plastindustrien (is part of DI)	~275	n/a	n/a	n.a.	Only as part of DI	No	EuPC, PlasticsEurope	

Colour code: the organisation marked in yellow has some members in the sector but is not considered a representative social partner organisation.

Annex 8. Network of Eurofound Correspondents

Table A51: National correspondents who have contributed to this study

Country	Correspondent(s)	Organisation
AT	Georg Adam	Working Life Research Centre (FORBA)
BE	Dries Van Herreweghe	HIVA – Research Institute for Work and Society, KU Leuven
BG	Tsvetomila Ivanova	Institute of Social and Trade Union Research (ISTUR)
CY	Pavlos Kalosinatos Alexandros Perdikes	Cyprus Labour Institute of the Pancyprian Federation of Labour (NEK-PEO)
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	German Economic Institute
DK	Maria Hansen	Employment Relations Research Centre (FAOS), University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Penny Georgiadou	Labour Institute of the General Confederation of Greek Workers (INE GSEE)
ES	Alejandro Godino	Institute for Labour Studies, Universitat Autònoma de Barcelona
FI	Amanda Kinnunen	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejakovic Irena Klemencic	Institute of Public Finance (IPF)
HU	Nóra Krokovay Szilvia Borbély	Kopint-Tárki Institute for Economic Research
IE	Colman Higgins	IRN Publishing
IT	Lisa Dorigatti	Department of Social and Political Sciences, University of Milan
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
LV	Krišs Karnītis	EPC Ltd
MT	Christine Garzia	University of Malta
NL	Eelco Tammens Paul Vroonhof	Panteia BV
PL	Maciej Pańków	Foundation Institute of Public Affairs
PT	Reinhard Naumann	Friedrich-Ebert-Stiftung (Lisbon)
RO	Victoria Stoiciu Nicoleta Voicu	Association Center for Public Innovation.
SE	Nils Brandsma	Oxford Research AB
SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Ludovit Cziria	Institute for Labour and Family Research

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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 chemical 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 IndustriAll Europe – representing employees – and the European Chemical Employers Group (ECEG) – representing employers – as the most representative European-level social partner organisations in the chemical sector.

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

