Representativeness of the European social partner organisations: Construction sector

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This study provides information designed to aid the functioning of sectoral social dialogue in the construction sector. The study is divided into three parts: a summary of the sector's economic background; an analysis of the social partner organisations in all EU Member States (apart from Croatia), including membership, role in collective bargaining, social dialogue and public policy, and national and European affiliations; and an overview of the relevant European organisations, in particular their membership composition and capacity to negotiate. The aim of Eurofound's series of representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. The impetus for these studies comes from the European Commission's aim to recognise the representative social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU).

Introduction

Objectives of the study

The aim of this representativeness study is to identify the relevant national and supranational social actors – the trade unions and employers' organisations – in the field of industrial relations in the construction sector, and to show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study arises from the aim of the European Commission to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). Hence, this study seeks to provide basic information needed to support sectoral social dialogue. The effectiveness of European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the EU Member States. Only associations which meet this precondition will be admitted to European social dialogue.

Concept and methodology

To accomplish these aims, the study identifies the sector-related national and European social partner organisations in the construction sector, via a top-down (listing the members of the European affiliations) and a bottom-up approach (through Eurofound's Network of National Correspondents).

The study first identifies the relevant national social partner organisations in the construction sector and then analyses the structure of the sector's relevant European organisations, in particular, their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation.

The study includes only organisations whose membership domain is 'sector-related' (Table 1).

Table 1: Determining the ‘sector-relatedness’ of an organisation

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

Source: Standardised questionnaire sent to Eurofound’s Network of European Correspondents (2013–2014)

At both national and European levels, many associations are not considered to be social partner organisations as they do not essentially deal with industrial relations. Therefore, there is a need for criteria to define clearly the social partner organisations.

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

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

While affiliation to a European social partner organisation is sufficient to determine a national association as a social partner, this does not necessarily imply that the association is involved in industrial relations in its own country. Although this selection criterion may seem odd at first glance, a national association which is a member of a European social partner organisation will become involved in industrial relations matters at EU-level through its membership of the

European organisation: through informal communication, consultation procedures and eventually the implementation of agreements concluded by the European social partners at national level.

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

A European association is considered a relevant sector-related interest organisation if:

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

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

Definitions

For the purpose of this study, the construction sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE) to ensure the cross-national comparability of the findings. The NACE code reflects the field of activities covered by the European Sectoral Social Dialogue Committee 'Construction' as demarcated by the social partners in agreement with the European Commission.

More specifically, the construction sector is defined as embracing NACE (Rev. 2) 41, 42 and 43. This includes the following activities:

- 41 Construction of buildings;
- 42 Civil engineering;
- 43 Specialised construction activities.

The domains of the trade unions and employers' organisations and the scope of the relevant collective agreements are likely to vary from this precise NACE definition. The study therefore includes all trade unions, employers' organisations and multi-employer collective agreements which are 'sector-related' in terms of any of the following four aspects or patterns:

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

Organisations are considered to be 'sector related' if their membership domain relates to the sector in one of the ways displayed in Figure 1. Table 2 summaries the domain pattern and scope of the sector in terms of these four aspects or patterns.

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

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

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the union's/employers' organisation's domain embrace potentially all employees in the construction sector?	Does the union/employers' organisation also represent potentially members outside the construction sector?
Congruence (C)	Yes	No
Sectionalism (S)	No	No
Overlap (O)	Yes	Yes
Sectional overlap (SO)	No	Yes

Note: The domain pattern is based on the answers to the questions on the scope of the domain illustrated in Table 1.

Sectoral Social Dialogue Committee – Construction

The Sectoral Social Dialogue Committee (SSDC) at European level for the construction sector was set up in 1999 in response to a joint request by the European Construction Industry Federation (FIEC) on the employers' side and the European Federation of Building and Woodworkers (EFBWW) on the unions' side.

Since 2007, the European Builders Confederation (EBC) has attended SSDC meetings in the FIEC delegation. At the time of drafting this report (spring 2015), EBC is not recognised by the European Commission as a European social partner but has requested recognition.

In line with the conceptualisation of this study as outlined above, affiliation to one of these three European organisations (FIEC, EBC and EFBWW) is a sufficient criterion for classifying a national association of one of the European Union Member States as a relevant social partner organisation for the purpose of this study.

However, the constituent criterion is one of sector-related membership. This is important, in particular, in the case of EFBWW due to its sector-overlapping membership domain. Thus, the study includes only those affiliates to EFBWW whose domain relates to the construction sector, as defined earlier.

Collection of data

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless otherwise stated, this study draws on country studies provided by Eurofound's European Industrial Relations Observatory (EIRO), a network of national industrial relations experts which became part of Eurofound's Network of European Correspondents in April 2014. The national correspondents complete a standard questionnaire by contacting the sector-related social partner organisations in their countries. The contact is generally made via telephone interviews in the first place but might, in certain cases, be established via email. In case of the unavailability of any representative, the national correspondents are asked to fill out the relevant questionnaire based on secondary sources, such as information given on the social partner's website, or derived from previous research studies.

The cut-off date for data collection was 20 March 2013. However, data provided at a later stage (for example, during the procedure of verification of the national reports by the social partners) have also been considered.

It is often difficult to find precise quantitative data. In such cases, the Eurofound correspondents are requested to provide rough estimates rather than leaving a question blank, given the practical and political relevance of the study. However, if there is any doubt over the reliability of an estimate, this is noted.

In principle, quantitative data may stem from the following three sources::

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the respective organisations, which are then used for calculating the density rate on the basis of available statistical figures on the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations.

While the data sources of the economic sectoral figures cited in the report are generally statistics from Eurostat or national statistical offices, the figures in respect of the organisations are usually either administrative data or estimates. Furthermore, it should be noted that several country studies also present data on trade unions and business associations that do not meet the above definition of a sector-related social partner organisation, in order to give a complete picture of the sector's associational 'landscape'. For the above substantive reasons, as well as for methodological reasons of cross-national comparability, such trade unions and business associations are not considered in this overview report. These organisations can, however, still be found in the national contributions, which are available on demand from Eurofound.

Quality assurance

In order to assure the quality of the information gathered, several verification procedures and feedback loops have been employed.

- First, the study's coordinators, in collaboration with Eurofound staff, check the consistency of the national contributions.
- Second, Eurofound sends the national contributions to the national members of its Governing Board, as well as to the European-level sector-related social partner organisations. The peak-level organisations then ask their affiliates to verify the information. Feedback received from the sector-related organisations is then taken into account, if it is in line with the methodology of the study.
- Third, the complete study is finally evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Structure of report

The study consists of three main parts, beginning with a brief summary of the sector's economic background, followed by an analysis of the relevant social partner organisations in all EU Member States (except for Croatia, which was not a Member State when the study was started). The third part of the study examines the representative associations at European level.

Each section contains a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons: First, the method applied by national regulations and practices to capture representativeness has to be taken into account; Second, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not reach any definite conclusion on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for admission to the European social dialogue. The reason for this is that defining the criteria for adequate representativeness is a matter for political decision rather than an issue of research analysis.

Economic background

The construction sector, as defined for the purpose of this study, covers many different business activities such as residential housing building, construction of civil engineering projects (for example, roads, railways, tunnels and utility projects of various kinds), as well as plumbing, plastering, painting and other activities. These activities thus span both the public and the private sectors.

According to the Eurostat Labour Force Survey (LFS), the European construction industry employed nearly 15 million people in the third quarter of 2014. Construction is the biggest industrial employer in the EU (4.34 MB PDF), representing about 7% of total employment in the EU27. But due to the relatively widespread practice of undeclared work in the sector in at least several Member States according to the EurWORK national reports, it seems to be likely that not all of the European construction employment is recorded in the Eurostat data.

Due to its economic importance and its role as 'a major consumer of intermediate products (raw materials, chemicals, electrical and electronic equipment and so on) and related services', the performance of the construction sector directly impacts on 'the development of the overall economy' according to a strategy for sustainable competitiveness of the construction sector (114 KB PDF) published by the European Commission in 2012.

Up to the mid-2000s, the European construction industry contributed significantly to job creation in particular, according to the European Commission's strategy for its sustainable competitiveness, 'in some very promising areas, such as the renovation of buildings and in infrastructure'. This was supported by favourable national policies in terms of public contracting and investments as well as the promotion of 'low-energy' building. However, the economic recession in 2007–2008 hit the construction sector particularly hard. This is partially attributable to the sector's dependence on access to credit, which has increasingly been cut off during the crisis. Moreover, there have been severe drops in demand, particularly in the private residential but also in the infrastructure market, usually as a result of the constraints on public spending due to the crisis.

In general, one core reason for the pronounced decline in construction in many EU Member States may be found in the fact that (construction) investments can be postponed in a way that consumption cannot. Across the EU, the impact of the recession and the timing varied widely between Member States and not all construction subsectors have been equally affected. According to Eurostat structural business statistics, for example, construction activities in terms of both turnover and productivity declined more steeply in Ireland and Spain in the period between 2008 and 2013 than in the other Member States. While according to the European Commission's strategy for the sustainable competitiveness of the construction sector, the residential housing construction subsector was hit harder than most other parts of construction.

According to the reports from Eurofound's national correspondents, governments across the EU have taken various measures to mitigate the negative economic and employment effects of the recession on the construction sector. Such measures include:

- stimulating construction and low energy building programmes;
- advanced investment projects;
- tax concessions to stimulate demand in (private) building;
- subsidies for renovation.

Irrespective of the recent recession, the European construction sector faces a number of structural problems and challenges. As the most pressing among them, the Commission's strategy for the sector's sustainable competitiveness identified 'a shortfall of skilled workers in many companies, low attractiveness to young people due to the working conditions, limited capacity for innovation and the phenomenon of undeclared work'. The strategy also noted the increasing pressure in the world market from competitors from non-European countries which may benefit from less tight regulations in terms of labour and environmental law as well as state aid.

The European construction sector's business structure is highly fragmented, with a clear prevalence of small and medium-sized companies (SMEs), micro companies as well as an increasing number of self-employed people. However, there are also various forms of bogus self-employment. Since construction is a highly labour-intensive sector, the goal of minimising labour costs may induce employers to operate with bogus self-employed workers so as to save on direct pay and social security contributions. In a joint statement issued on 5 February 2010 (2MB PDF), the European sectoral social partners (EFBWW and FIEC) indirectly confirmed the widespread practice of undeclared work by recognising that:

unfair competition and social fraud are unacceptable in the construction industry and demand that these phenomena are eradicated, using a combination of prevention, information and enforcement. … [and that] bogus self-employment often occurs in a trilateral relationship between the contractor, an intermediary, and the worker.

Employment characteristics

Employment in the European construction industry is characterised by a clear prevalence of male workers and a relatively widespread practice of 'atypical' work. According to the LFS, men represented around 90% of total employment in the sector in the third quarter of 2014.

Many workers are on fixed-term or temporary employment contracts. In the third quarter of 2014, almost 12% of the total workforce was covered by temporary employment contracts according to the LFS. Apart from fixed-term employment, non-standard employment also involves part-time work and self-employment – 7.5% and more than 26%, respectively, in the third quarter of 2014 (LFS data). The share of non-standard employment in its various forms in construction is thus significantly higher than in most other economic sectors. With regard to self-employment, genuine self-employment needs to be distinguished from 'bogus self-employment'. According to a European Commission proposal for a decision to establish a European Platform to enhance cooperation in the prevention and deterrence of undeclared work:

bogus self-employment … occurs when the worker is formally declared as self-employed on the basis of a service contract but the work he/she performs fulfils all the criteria that are used by national law and practice to characterize an employment relationship.

Workers with non-standard employment relationships tend to be more vulnerable in terms of job security than standard employees. They have therefore been more affected by workforce reductions caused by the recession, according to several national reports. The same holds true of low-skilled and migrant workers, who are commonly deployed at construction sites.

Long-term trends

Tables 3 and 4 give an overview of the development from approximately 2001 to approximately 2011 (that is, the situation just after the peak of the recession). They present figures on companies, employment and employees in the sector and in relation to the national economy, stemming from both national sources and Eurostat.

In all of the 17 Member States apart from three (Poland, Portugal and the UK) for which related data are available from the Eurofound correspondents, the number of companies more or less increased. However, it is uncertain whether this growth actually reflects a general expansion of the sector witnessed in these countries or just a process of fragmentation of the sector's company structure and/or the emergence of a number of self-employed workers. In a few countries, such as Malta, Romania and Slovakia, the number of companies increased by 50% or more within the decade to the early 2010s (Table 3). The case of Sweden is unclear, since the data from the two reference years are not comparable.

Table 3: Total number of companies and employment in construction, 2001 and 2011 (approximately)

Country	Year	Number of companies	Year	Total employment	Female employment	Male employment	Total sectoral employment as % of total employment in economy
AT	n.a.	n.a.	2001	309,500	30,300	279,200	8.5
	2010	31,196	2011	360,700	51,100	309,600	8.8
BE	2000	81,515	n.a.	n.a.	n.a.	n.a.	n.a.
	2010	92,203	2010	334,400	32,200	302,200	7.4
BG	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	2011	19,543	2011	161,559	15,559	146,000	5.4
CY	n.a.	n.a.	2004	39,400	n.a.	n.a.	11.7
	2010	6,709	2011	44,400	3,500	40,900	11.1
CZ	2001	228,512	2001	444,900	45,400	399,500	9.4
	2011	230,356	2011	431,000	34,200	396,800	8.8
DE	n.a.	n.a.	2001	2,903,000	381,000	2,522,000	7.9
	2011	385,898	2011	2,646,000	334,000	2,312,000	6.6
DK	2001	27,830	2001	174,224	16,811	157,413	6.3
	2010	31,588	2011	150,218	14,353	135,865	5.6
EE	n.a.	n.a.	2001	38,900	2,900	36000	6.7
	2011	7,888[a]	2011	59,000	6,300	52,700	9.7
EL	n.a.	n.a.	2001	306,146	5,269	300,877	7.6
	2009	112,952	2011	247,300	10,100	237,200	6.2
ES	n.a.	n.a.	2001	1,872,000	88,100	1,783,900	11.7
	2010	371,025	2011	1,388,300	102,000	1,286,300	7.7
FI	2001	29,585	2001	125,400	9,300	116,100	5.4
	2011	42,485	2011	173,200	14,000	159,200	7.8
FR	2001	329,865	2001	1,722,000	n.a.	n.a.	5.9
	2011	456,747[b]	2011	1,722,300	n.a.	n.a.	n.a.
HU	2001	83,955	2001	271,500	21,500	250,000	7
	2011	98,654	2011	264,000	18,800	245,200	6.9
IE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	2011	158,201	n.a.	n.a.	8.5
IT	2001	515,777	2001	1,529,146	136,100	1,393,046	7
	2010	607,771	2011	1,822,800	121,700	1,701,100	8.1

Country	Year	Number of companies	Year	Total employment	Female employment	Male employment	Total sectoral employment as % of total employment in economy
LT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	2012	5,987	2012	89,000	8,800	80,400	7
LU	2000	>1,953	2001	28,600	n.a.	n.a.	10.3
	2009	3,025	2011	40,200	n.a.	n.a.	10.9
LV	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	2011	6,529	2011	52,478	n.a.	n.a.	~9
MT	2002	3,896	2001	10,399	327	10,072	7.1
	2011	5,861	2011	11,807	625	11182	7
NL	2001	67,597	n.a.	n.a.	n.a.	n.a.	n.a.
	2011	73,140	n.a.	n.a.	n.a.	n.a.	n.a.
PL	2001	354,000	2001	737,000	91,000	646,000	5
	2010	233,019	2011	1,309,600	84,900	1,224,700	8.5
PT	2000	38,009[a]	2000	306,653[a]	n.a.	n.a.	11.4
	2010	36,101[a]	2010	294,129[a]	n.a.	n.a.	10.6
RO	2001	14,299	2000	403,400	n.a.	n.a.	3.7
	2011	43,503	2011	679,500	n.a.	n.a.	7.5
SE	2001	22,285[c]	n.a.	n.a.	n.a.	n.a.	n.a.
	2010	87,119	2011	304,700	23,300	281,400	6.7
SI	2001	15,605	2001	55,100	6,000	49,000	6.2
	2011	18,826	2011	54,000	5,200	48,800	5.8
SK	2001	44,571	2001	169,500	13,700	155,800	8
	2010	91,432	2011	242,900	14,500	228,400	10.3
UK	2001	346,600	2001	1,945,700	203,400	1,742,200	6.8
	2011	271,985	2011	2,134,000	235,100	1,898,900	6.9

Notes: For a detailed description of the sources of these data, please refer to the national reports. [a] Without self-employed workers; [b] Figure questioned by FIEC and the French Building Federation (FFB); [c] Figure includes only employer companies; n.a. = not available.

Source: EIRO national correspondents (2013–2014), national statistics.

Twelve of the 20 countries with available data recorded an increase in overall employment within the sector in the same time period, while in eight countries employment fell. Losses in employment were most outstanding in Greece and Spain, recording declines of 19% and 26%, respectively (Table 3). In both countries, however, it is likely that the losses can be traced back almost exclusively to the period from 2008 onwards, when the global economic crisis arose.

In terms of the number of sectoral employees, nine countries recorded a decrease during the period of observance, while in 12 countries this indicator increased; no comparable data are available for six countries (Table 4). In at least seven Member States (Czech Republic, Germany, Greece, Hungary, Italy, Malta and Slovakia), the number of employees with a contractual relationship amounted to less than two-thirds of the total number of employment. One can infer from these findings that, at least in these countries (comparable data are not available for all Member States), the sector is characterised by a high incidence of non-standard employment arrangements.

Table 4: Total employees in construction, 2001 and 2011 (approximately)

Country	Year	Total employees	Female employees	Male employees	Total sectoral employees as % of total employees in economy
AT	2001	284,200	27,100	257,100	8.9
	2011	327,100	48,600	278,500	9.7
BE	n.a.	n.a.	n.a.	n.a.	n.a.
	2010	24,3000	24,400	218,600	7
BG	n.a.	n.a.	n.a.	n.a.	n.a.
	2011	141,650	n.a.	n.a.	6.3
CY	2004	29,700	n.a.	n.a.	11.5
	2011	34,700	3,400	31,300	10.6
CZ	2001	295,900	38,400	257,500	7.4
	2011	253,900	29,300	224,600	6.4
DE	2001	2,027,343	246,198	1,781,145	7.3
	2011	1,637,091	210,373	1,426,718	5.8
DK	2001	153,802	15,017	138,785	6
	2011	131,633	13,418	118,215	5.3
EE	2001	34,800	2,900	31,900	6.6
	2011	50,900	5,700	45,200	9.1
EL	2001	199,876	3,879	195,997	8.1
	2011	155,400	8,100	147,400	6
ES	2001	1,499,100	75,500	1,423,600	11.7
	2011	1,036,700	85,400	951,300	6.9
FI	2001	111,800	9,000	102,800	5.6
	2011	133,700	12,400	121,300	6.3
FR	2001	1,283,000	128,000	1,156,000	5.6
	2011	1,495,400	169,000	1,326,400	6.6
HU	2001	122,100	n.a.	n.a.	4.5

Country	Year	Total employees	Female employees	Male employees	Total sectoral employees as % of total employees in economy
	2011	115,700	n.a.	n.a.	4.3
IE	n.a.	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.	n.a.
IT	2001	861,195	90,011	771,184	5.5
	2011	1,133,200	91,000	1,042,200	6.6
LT	n.a.	n.a.	n.a.	n.a.	n.a.
	2012	79,900	8,500	71,500	7
LU	2001	27,300	n.a.	n.a.	10.5
	2011	38,900	n.a.	n.a.	11.2
LV	n.a.	n.a.	n.a.	n.a.	n.a.
	2011	50,476	n.a.	n.a.	~10
MT	2001	7,629	285	7,344	6
	2011	7,583	513	7,074	5.2
NL	2001	504,000	36,000	468,000	7.2
	2011	473,000	40,000	433,000	5.9
PL	2001	603,000	79,000	524,000	6.6
	2011	1,023,600	71,100	952,500	8.4
PT	2000	252,624	19,602	239,022	10.7
	2010	269,346	25,543	243,803	10.4
RO	2000	355,200	n.a.	n.a.	5.9
	2011	500,100	n.a.	n.a.	8.1
SE	2001	192,819	n.a.	n.a.	5.3
	2011	242,600	21,700	221,000	5.9
SI	2001	45,200	5,600	39,600	6
	2011	41,400	4,500	36,900	5.4
SK	2001	131,500	12,500	119,000	6.8
	2011	132,600	13,500	119,100	6.7
UK	n.a.	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.	n.a.

Note: For a detailed description of the sources of these data, please refer to the national reports.

Source: EIRO national correspondents (2013–2014), national statistics.

Tables 3 and 4 also corroborate the earlier finding that men represent the vast majority of workers in the construction sector. In all countries with available data, male employees by far outnumber female employees, representing at least 80% or 90% of the sector's total workforce.

The tables also indicate that the construction sector is very large. In terms of the share of employment, it proved quite dynamic during the decade to the early 2010s in most countries with available data, with 10 countries showing an upward trend and 10 countries showing a downward trend. In some countries, such as Estonia, Finland, Poland, Romania and Slovakia, the respective employment shares grew by at least 2 percentage points, while in other countries these shares fell considerably, in particular in Spain, were there was a 4.8 percentage point loss in the period between 2001 and 2011 (Table 4).

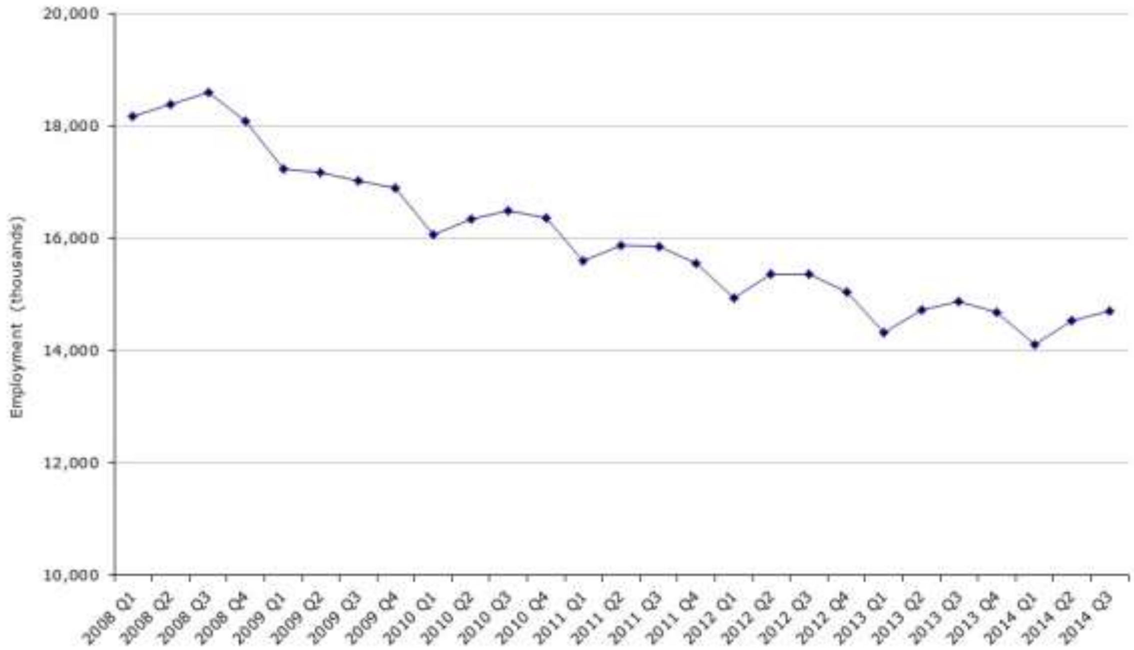
The construction sector's share in aggregate employment ranges from 5.4% in Bulgaria to more than 11% in Cyprus (Table 3); no related data were reported for seven countries. In terms of absolute numbers of sectoral workers, six countries (France, Germany, Italy, Poland, Spain and the UK) recorded more than one million people who were gainfully employed in the sector in the early 2010s. Both Germany and the UK recorded far more than two million workers in the sector (Table 3).

Recent developments

The impact of the recession from 2008 onwards on the construction sector varied between countries. Overall, at least in terms of employment, the construction sector appears to have suffered more severely from the recession compared with most other industries.

Overall in the European Union, in terms of employment the construction sector was particularly severely hit by the recession: employment for the 15–64 age group declined steadily between 2008 and 2014 from more than 18.6 million in the third quarter of 2008 to less than 15 million in the third quarter of 2014 (Figure 2).

Figure 2: Total number of employees in construction during the recession (EU27)



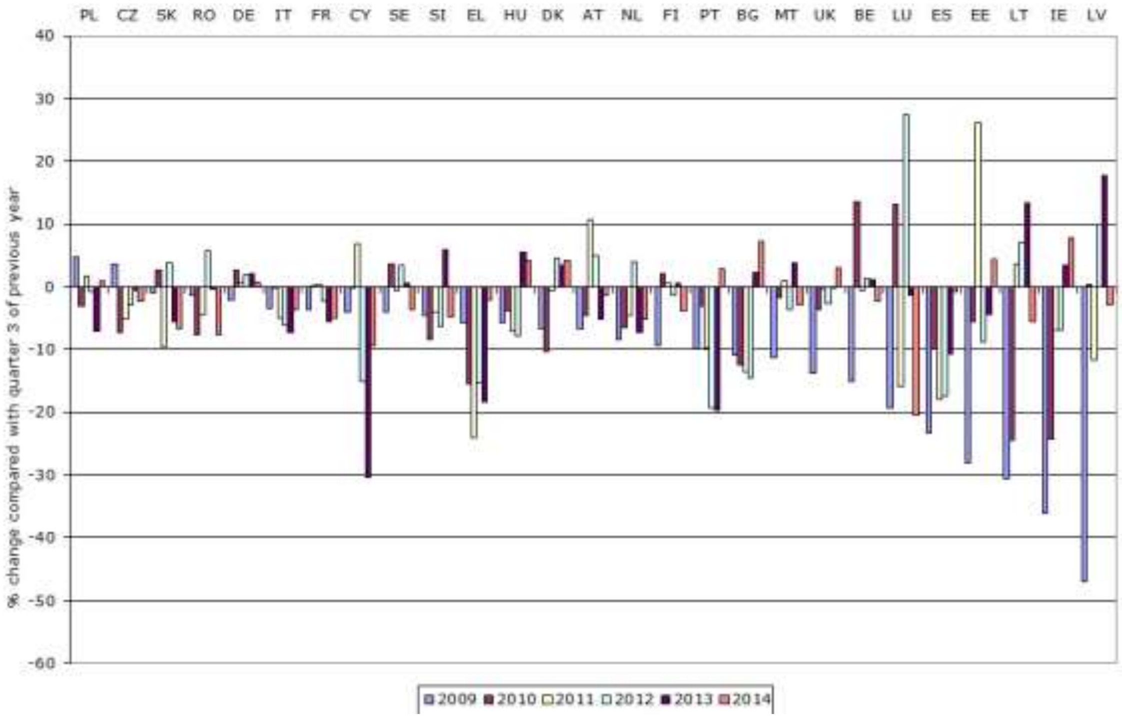
Note: Workforce aged 15–64 years.

Source: Eurostat, Labour Force Survey (LFS), 2015.

Figure 2 also shows that the steady decline in employment over the whole period of observance is coincidently overlaid by a cyclical development within each year. This indicates that employment variations in the sector within a year are caused by seasonal fluctuations, in that employment peaks are regularly observable in the second and third quarters of a year. This does not come as a surprise since construction activities tend to increase in the warmer seasons, dependent on weather conditions.

In contrast to Figure 2, which gives a view on the overall development of employment in the sector for the EU27, Figure 3 provides a picture of sectoral employment changes disaggregated by country. It shows the annual percentage changes of sectoral employment to the third quarter of the previous year for the period 2008 to 2014 for each individual Member State. Figure 3 indicates that, in all EU Member States, the sector declined, to at least a certain degree, in terms of employment in at least one of the six consecutive years from 2009 to 2014.

Figure 3: Development of employment in construction during the recession



Notes: Workforce aged 15–64 years. Percentage change to quarter 3 of the previous year.

Source: Eurostat LFS, 2015, and authors' own calculations on the basis of LFS data.

All countries except for the Czech Republic and Poland recorded a reduction in employment in the construction sector between 2008 and 2009 (Figure 3). In addition, a majority of countries recorded decreases in each of the subsequent years in relation to the respective previous years, although the number of countries recording a growth in employment in relation to the year before increased from only two in 2009 to 12 in 2013. However, this number fell again in 2014 and it remains to be seen whether this year marks a trend reversal or is just an isolated event.

The impact of the recession on the construction sector was particularly strong at the beginning of the crisis. However, the impact diminished steadily over the next few years – at least until 2013. No country recorded an increase in employment in the sector for all the six consecutive years from 2009 to 2014. Only one country, Germany, recorded increases for five years within the six-year period. Conversely, Greece, Italy and Spain all saw job losses within the sector in all six consecutive years of the observation period. Job losses occurred in five years within the six-year period in Cyprus, the Czech Republic, the Netherlands, Romania and Slovenia. Large-scale declines of more than 30% from one year to the next can be observed only in countries such as Cyprus, Ireland, Latvia and Lithuania.

Overall, Figure 3 confirms the finding above that both the impact of the recession on the construction sector and its timing varied considerably between Member States. In this context, it is not possible to link significant job losses to one single cause – the recent recession. Rather, it seems likely that changes in sectoral employment levels within a very short period of time are due to a number of factors including global economic trends and country- and sector-specific developments such as the property crash in Ireland or the real estate bubble burst in Spain.

National level of interest representation

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

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

Under these circumstances, representativeness is normally measured by the membership strength of the organisations. In many countries, for instance, statutory provisions allow for the extension of collective agreements to unaffiliated employers only when the signatory trade union and employer association represent 50% or more of the employees within the agreement's domain.

As outlined previously, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations for participation in European social dialogue. Hence, the role of the national actors in collective bargaining and public policymaking constitutes another important component of representativeness. The relevance of the European sectoral social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate the employment terms and to influence national public policies affecting the sector.

A cross-national comparative analysis by Franz Traxler shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy. Social partner organisations that are engaged in multi-employer bargaining are incorporated in state policies to a significantly greater extent than their counterparts in countries where multi-employer bargaining is lacking. This can be attributed to the fact that only multi-employer agreements matter in macroeconomic terms; this in turn gives governments an incentive to persistently seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective agreements will have a noticeable effect on the economy due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be limited.

In summary, representativeness is a multi-dimensional concept that embraces three basic elements:

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

These elements are discussed in the section below.

Membership domains and strength

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups which the organisation does not claim to represent. As already explained, this study considers only organisations whose domain relates to the construction sector. However, there is insufficient room in this report to delineate the domain demarcations of all the organisations. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of 'sector-relatedness', as specified in the section on concepts and methodology.

There is a difference between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as the density; in other words, the ratio of actual to potential members.

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

For a sector study such as this, measures of membership strength of trade unions and employers' organisations generally also have to consider how the membership domains relate to the sector. If a domain is not identical with the sector demarcation, the organisation's total density (that is, the density referring to its overall domain) may differ from sector-specific density (that is, the organisation's density referring to the sector).

This report first presents data on the domains and membership strength of the trade unions and then considers those of the employers' organisations. As far as sectoral membership numbers are concerned, sectoral densities can be calculated provided the number of employees within the sector is given.

Trade unions

Table 5 presents data on trade union domains and membership strength. It lists all trade unions which meet at least one of the two criteria for classification of a sector-related social partner organisation as defined earlier. The abbreviated and full names of trade unions in the construction sector in the EU27 are listed by country in Annex 1.

All the 27 Member States studied have at least one sector-related trade union. A total of 81 sector-related trade unions were identified. Of these 81 unions, only three have demarcated their domain in a way that is largely congruent relative to the sector definition. This is not a surprise, given that artificially defined demarcations of business activities for statistical purposes tend to differ from the lines along which employees identify common interests and gather in associations. Domains congruent relative to the sector can be found with SB-OGBL and LCGB-CA of Luxembourg and FNV Bouw of the Netherlands: all of them are specific construction trade unions, although it could be possible that that their membership domain would also cover smaller parts of sectors other than construction.

Table 5: Domain coverage, membership and density of trade unions in construction, 2011/2012/2013

	Trade union	Type of membership	Domain coverage[a]	Membership		Density	
				Active members	Members active in sector	Sector density (%)	Sectoral domain density in relation to overall domain density
AT	GBH	voluntary	SO	116,376[b]	n.a.	n.a.	n.a.
	PRO-GE	voluntary	SO	209,502	n.a.	n.a.	n.a.
	GPA-djp	voluntary	SO	172,000	n.a.	n.a.	n.a.
BE	FGTB-CG/ABVV-AC*	voluntary	SO	400,000	75,000	30.9	n.a.
	CGSLB/ACLVB*	voluntary	O	270,000	21,000	8.6	n.a.
	CSC/ACV Building, Industry & Energy*	voluntary	SO	173,388	81,000	33.3	n.a.
BG	FITUC*	voluntary	O	4,120	2,298	1.6	n.a.
	FCIW-Podkrepa*	voluntary	O	6,000	1,000	0.7	n.a.
CY	DWUBC*	voluntary	S	3,651	3,651	10.5	n/a
	CWU*	voluntary	SO	17,367	n.a.	n.a.	n.a.
	OOIMSEK*	voluntary	SO	8,534	n.a.	n.a.	n.a.
CZ	OS STAVBA	voluntary	O	9,953	5,000	2	n.a.
DE	IG BAU	voluntary	O	297,763	n.a.[d]	n.a.	>
	IG Metall	voluntary	SO	n.a.	25,000	1.5	<
	CGM*	voluntary	SO	89,400	n.a.	n.a.	n.a.
DK	DEF	voluntary	SO	23,530	17,000	12.9	equal
	Blik & Roer	voluntary	SO	8,226	7,500	5.7	equal
	3F	voluntary	SO	280019	67,000	50.9	<
	Dansk Metal	voluntary	SO	86561	900	0.7	<
	Malerforbundet	voluntary	SO	8464	7,000	5.3	equal
	HK Privat	voluntary	SO	205,931	n.a.	n.a.	n.a.
EE	ETTA	voluntary	n.a.	3,520	830	1.6	<

	Trade union	Type of membership	Domain coverage[a]	Membership		Density	
				Active members	Members active in sector	Sector density (%)	Sectoral domain density in relation to overall domain density
	EEAÜL	voluntary	SO	2,013	500	1	<
EL	GFBRP	voluntary	S	n.a.	n.a.	n.a.	n/a
	HFOMD	voluntary	SO	150,000	32,000	20.6	n.a.
ES	MCA-UGT*	voluntary	O	1,200,000	n.a.	n.a.	n.a.
	FECOMA-CCOO*	voluntary	O	n.a.	n.a.	n.a.	n.a.
	ELA-HAINBAT*	voluntary	SO	19,990	n.a.	n.a.	n.a.
	FCM-CIG*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
FI	FCTU	voluntary	S	60,000	60,000	44.9	n/a
	Pro*	voluntary	SO	90,000	6,000	4.5	equal
	FEWU	voluntary	SO	21,000	11,000	8.2	equal
	JHL	voluntary	SO	180,000	1,400	1	equal
	YTN*	voluntary	SO	120,000	3,300	2.5	equal
	Pardia	voluntary	SO	47,000	500	0.4	<
FR	FO Construction*	voluntary	O	n.a.	n.a.	n.a.	n.a.
	FNCB-CFDT*	voluntary	O	35,000	17,500	1.2	<
	BATI-MAT-TP CFTC*[c]	voluntary	O	n.a.	n.a.	n.a.	n.a.
	FNS Construction*[c]	voluntary	O	n.a.	n.a.	n.a.	n.a.
	CFE-CGC BTP*	voluntary	SO	3,000	1,500	0.1	n.a.
HU	EFEDOSZSZ	voluntary	O	6,000	5,000	4.3	equal
IE	SIPTU*	voluntary	O	199,881	n.a.	n.a.	n/a
	OPATSI	voluntary	S	615	615	n.a.	n/a
	BATU*	voluntary	S	4,000	4,000	n.a.	n/a
	UCATT*	voluntary	SO	8,750	n.a.	n.a.	n.a.
	TEEU	voluntary	SO	39,000	n.a.	n.a.	n.a.
IT	FILLEA CGIL*	voluntary	SO	353,000	291,000	25.7	>
	FILCA CISL*	voluntary	SO	302,067	n.a.	n.a.	n.a.

	Trade union	Type of membership	Domain coverage[a]	Membership		Density	
				Active members	Members active in sector	Sector density (%)	Sectoral domain density in relation to overall domain density
	FENEAL UIL*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
	UGL COSTRUZIONI*	voluntary	n.a.	n.a.	n.a.	n.a.	n.a.
	FESICA*	voluntary	n.a.	n.a.	n.a.	n.a.	n.a.
LT	LSPS	voluntary	O	1,500	750	0.9	n.a.
LU	SB-OGBL*	voluntary	C	n.a.	n.a.	n.a.	n/a
	LCGB-CA*	voluntary	C	n.a.	n.a.	n.a.	n/a
LV	LCA*	voluntary	O	1,019	n.a.	n.a.	<
	LCDAA*	voluntary	SO	1,203	1,084	2.1	equal
MT	GWU*	voluntary	O	37,488	n.a.	n.a.	<
	UHM*	voluntary	O	22,565	n.a.	n.a.	<
NL	FNV Bouw*	voluntary	C	106,528	106,528	22.5	n/a
	CNV Vakmensen*	voluntary	O	132,000	38,500	8.1	>
PL	Budowlani*	voluntary	O	12,500	4,000	0.4	<
	SBiPD*	voluntary	O	8,500	2,000	0.2	n.a.
PT	SETACCOP*	voluntary	O	n.a.	8,700	3.2	>
	FEVICCOM*	voluntary	O	30,000	20,000	7.4	n.a.
	SQTD*	voluntary	SO	2,000	n.a.	n.a.	n.a.
RO	FGS Familia	voluntary	O	60,000	55,000	11	>
SE	ST	voluntary	SO	75,000	n.a.	n.a.	n.a.
	Ledarna*	voluntary	SO	90,000	9,500	3.9	>
	Elektrikerna	voluntary	SO	25,000	10,000	4.1	>
	Byggnads*	voluntary	S	60,000	60,000	24.7	n/a
	GS	voluntary	SO	40,000	n.a.	n.a.	>
	SPU	voluntary	SO	15,000	14,100	5.8	>
	TJ	voluntary	SO	4,000	600	0.2	>
	SEKO	voluntary	SO	83,000	20,000	8.2	>
	SAGE*	voluntary	SO	134000	2000	0.8	<
	Unionen*	voluntary	SO	535,000	15,000	6.2	>

	Trade union	Type of membership	Domain coverage[a]	Membership		Density	
				Active members	Members active in sector	Sector density (%)	Sectoral domain density in relation to overall domain density
SI	SDGD	voluntary	O	4,000	n.a.	n.a.	n.a.
SK	IOZ	voluntary	O	14,186	<7,150	<5.4	<
UK	GMB*	voluntary	O	621,500	20,000	0.9	<
	UCATT*	voluntary	O	83,760	n.a.	n.a.	n.a.
	UNITE*	voluntary	O	1,500,000	45,000	2.1	>

*Notes: * Domain overlap with other sector-related trade unions. [a] Domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism (for details see Table 2); [b] Figure includes non-active members; [c] Union representative contacted refused to give (part of) the requested information; [d] Answer deliberately refused.n.a. = not available; n/a = not applicable.*

Source: EIRO/EurWORK national correspondents (2013–2014), administrative data and estimates.

Domain demarcations resulting in overlap relative to the sector occur in 36% of the cases for which related information is available (Figure 4). In general, overlap arises from two different modes of demarcation:

- general (that is, cross-sectoral) domains (as is the case for GWU of Malta, CGSLB/ACLVB of Belgium, SIPTU of Ireland, IOZ of Slovakia, and GMB and UNITE of the UK);
- domains covering the broader construction (including manufacture of building materials) and woodworking sector, sometimes also including part of the metal, mining and public utilities industries (as is the case for FITUC and FCIW-Podkrepa of Bulgaria, OS STAVBA of the Czech Republic, IG BAU of Germany, MCA-UGT and FECOMA-CCOO of Spain, FO-Construction, FNCB-CFDT, BATI-MAT-TP CFTC and FNS Construction of France, EFEDOSZSZ of Hungary, LSPS of Lithuania, LCA of Latvia, Budowlani and SbiPD of Poland, SETTACOP and FEVICCOM of Portugal, FGS Familia of Romania and SDGD of Slovenia).

Sectional overlaps prevail in the sector and occur in 53% of the cases for which information is available (Figure 4). This mode usually emanates from domain demarcations which focus on certain categories of employees which are then organised across several or all sectors. This mode can be found with trade unions representing employees in segments of the economy sectionalistically overlapping relative to the construction sector. Employee categories are specified by various parameters such as:

- distinct occupations, for example:
  - electricians – see DEF of Denmark, FEWU of Finland, TEEU of Ireland and Elektrikerna of Sweden;
  - painters – see Malerforbundet of Denmark and SPU of Sweden;

- managers – see YTN of Finland, CFE-CGC BTP of France and Ledarna of Sweden;
- graduate engineers – see SAGE of Sweden;
- draftspersons – see SQTD of Portugal.

- employment status, for example:
  - white-collar workers, as is the case of GPA-djp of Austria, Denmark's HK Privat, Finland's Pro and Pardia, and Sweden's Unionen;
  - blue-collar workers, as is the case of GBH and PRO-GE of Austria, FGTB-CG/ABVV-AC/and CSC/ACV of Belgium, 3F of Denmark and HFOMD of Greece.
- geographic region, for example, ELA HAINBAT and FCM-CIG of Spain.

Other trade unions' domains cover part of the construction sector in terms of business activities (rather than in terms of employee categories) in addition to (parts of) at least another sector. Such domains may, for instance, cover the following:

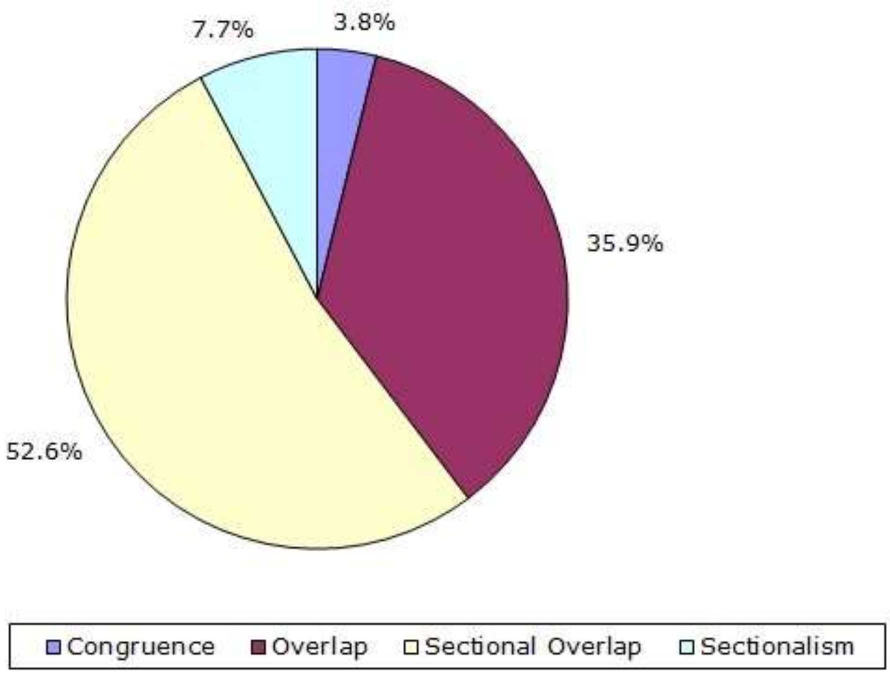
- part of the local government sector (for example, JHL of Finland);
- the private sector (for example, CWU and OOIMSEK of Cyprus);
- the metalworking sector (see EEAÜL of Estonia and IG Metall of Germany);
- the woodworking sector (see FILLEA CGIL, FILCA CISL and FENEAL UIL of Italy).

Last, but not least, sectionalism is also common in the sector, albeit with a relatively small share of 7.7% of trade unions for which related information is available recording this mode of domain demarcation relative to the sector (Figure 4). Sectionalism arises from the existence of sector-specific trade unions which represent, in terms of employee category, one or more particular building grades/professions (for example, plasterers as is the case of Ireland's OPATSI, carpenters as is the case of DWUBC of Cyprus and bricklayers as is the case of Ireland's BATU) or employment status (such as blue-collar workers – see Finland's FCTU, Greece's GFBRP and Sweden's Byggnads), without any representational domain outside the sector.

Those trade unions whose membership domain does not cover the entire construction sector have delimited their domain primarily in terms of occupations and economic activities rather than (legal) form/size of enterprise and region: 42.5% of the trade unions with available information have a domain which does not cover all occupations, while 34.2% of the trade unions with available information have a domain which does not cover all economic activities within the sector.

But although there are several relatively highly specialised trade unions with a clear-cut and narrow membership domain focusing on a particular occupational subgroup within the sector's workforce, there is no indication that this specialisation particularly fosters high unionisation rates in the sector. According to a number of national reports, unionisation rates tend to be lower in the construction sector than in other sectors.

Figure 4: Distribution of membership domain patterns of sector-related trade unions in construction



Notes: Percentages are rounded. N = 78.

Source: EIRO/EurWORK national reports (2013–2014)

The construction sector is characterised by several features, most of which are generally deemed unfavourable to member recruitment. These are:

- relatively low average skill levels, in particular among onsite construction workers in the EU15 and in southern European countries (4.34 MB PDF);
- high labour turnover;
- high presence of non-standard (fixed-term, part-time) as well as undeclared work;
- high incidence of migrant work.

As the trade union domains often overlap with the demarcation in the sector, so do their sectoral domains with one another in the case of those countries with a pluralist trade union 'landscape' in the construction sector. In the pluralist trade union systems (recording more than one sector-related trade union) of Austria, Denmark, Estonia and Greece, no case of inter-union domain overlap within the sector can be observed. In all other countries with more than one sector-related trade union (Belgium, Bulgaria, Cyprus, Finland, France, Germany, Ireland, Italy, Latvia, Luxembourg, Malta, the Netherlands, Poland, Portugal, Spain, Sweden and the UK), the sectoral domain of at least one trade union overlaps with the sectoral domain of at least one other trade union (see Table 8 in the section on Collective bargaining). Depending on the scale of mutual overlap, this results in competition for members. Noticeable inter-union competition within the sector is recorded in five countries: Finland, France, Germany, Malta and Portugal.

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

The absolute numbers of trade union members differ widely, ranging from about 1.5 million (in the case of UNITE in the UK) to just over 600 (in the case of Ireland's OPATSI) (Table 5). This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members. Hence, density is a more appropriate measure of membership strength for a comparative analysis. This holds true despite the fact that some of the density figures gathered and calculated for the purpose of this study may be unreliable.

Therefore this report considers densities referring to the sector ('sectoral density'), given that a trade union's membership within the sector and the number of employees in the sector are both provided. Moreover, some tentative information (without providing figures) on the trade unions' 'sectoral domain density' (that is, the density referring only to that part of the sector as covered by the union's domain) in relation to their overall 'domain density' (that is, the density referring to the union's overall domain) is available for those unions with a domain (sectionalistically) overlapping with regard to the sector (see below).

The sectoral density figures provided in this section refer to net ratios, which means that they are calculated on the basis of active employees only rather than taking all union members (that is, those in work and those who are not) into account. This is mainly because research usually considers net union densities as more informative than gross densities, since the former measure tends to reflect unionisation trends among the active workforce more quickly and more appropriately than the latter, since only the active workforce is capable of taking industrial action.

More than 50% of the trade unions with available data have a sectoral density (calculated as the ratio of the number of members in the sector to the total number of employees in the sector) of less than 5%. Sectoral density is 30% or less in the case of more than 95% of the trade unions which document figures on density (Table 5).

There are two possible explanations for the overall very low sectoral densities of the sector-related trade unions:

- low densities with regard to the unions' sectoral domain (sectoral domain densities);
- their generally small size (in terms of sectoral membership domain) in relation to the sector.

While only tentative information is available for the former issue (see below), the latter appears to apply to many of the sector-related trade unions. This is indicated by the fact that more than half of the unions have a membership domain which is sectionalist or sectionalistically overlapping with regard to the sector and thus covers only part of the sector. But because sectoral density data can be calculated for only slightly more than half of the 81 sector-related trade unions, the available figures on sectoral density should be treated with caution.

Comparing the trade unions' overall domain densities with their sectoral domain densities provides an indication of whether the construction sector tends to be a stronghold of sector-related trade unions which also organise employees in sectors other than the construction industry, or not. The Eurofound national correspondents were asked to give a substantiated estimate of the relationship between these two densities, if possible, without providing exact figures. Almost the same number of trade unions (for which information is available) recorded a sectoral domain density that was either lower than or higher than their overall domain density. This result is astonishing given the outstandingly low sectoral densities of most trade unions which, in tandem with anecdotal evidence depicted in several national reports indicating low unionisation rates, would suggest a majority of unions record a sectoral domain density lower than their overall domain density. However, related information was provided for only a minority of the sector-related trade unions and, moreover, some of the answers to this question might eventually turn out to be unreliable. The results nevertheless show that, overall, the construction sector cannot be qualified as a stronghold of those trade unions with a membership domain (sectionalistically) overlapping with regard to the sector. Rather, in many cases, their core membership base supposedly lies in areas other than the construction sector.

In conclusion, the study reveals that there are many occupational trade unions in the construction sector which often record relatively narrow membership domains. This may favour a particularistic representation of collective interests on behalf of small professional groups. Nevertheless, despite the shortcomings in relation to data availability and the existing dataset, one can infer from the information collected that union density rates in the sector do not tend to be high. The relatively low densities within the sector can be explained by a large number of factors, such as relatively low average skill levels as well as non-standard (including bogus self-employment) and migrant work.

Employers' organisations

Tables 6, 7 and 9 present information on employers' and business organisations in the construction sector. The abbreviated and full names of the employers' and business organisations in the construction sector in the EU27 are listed by country in Annex 1.

As is the case of the trade union side, all 27 Member States have at least one sector-related employers' organisation. In eight countries (Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Malta, Spain and Slovakia), only one sector-related employers' organisation matching at least one of the two criteria for inclusion (see above) was identified. The remaining 19 countries have pluralist associational systems, meaning there are at least two sector-related employers' organisations.

Generally, business interest organisations may also deal with interests other than those related to industrial relations. As explained in an earlier Eurofound report, Employers' organisations in Europe, organisations specialised in matters other than industrial relations are commonly defined as 'trade associations'. Such sector-related trade associations exist in the construction sector. In terms of the national scope of their activities, all the associations that are not involved in collective bargaining (see Table 9 in the section on Collective bargaining) either primarily or exclusively act as trade associations in their country. Put simply, the main reference of trade associations is the 'product' market (where business has interests in relation to customers and suppliers) rather than the labour market. It is only the conceptual decision to include all associational affiliates to FIEC and EBC, regardless of whether they have a role in national bargaining which gives them, as a work hypothesis, the status of a social partner organisation within the framework of this study.

Of the 104 employers' or business organisations identified in this study, eight belong to this group of trade associations (no related information is available for three organisations, namely Luxembourg's FEDIL, Poland's KPB UNI-BUD and Romania's UNPR). As outlined above, in eight countries of the EU27 only one single organisation (in the meaning of a social partner organisation as defined before) has been established. The incidence of pluralist associational systems on the employers' side is therefore slightly lower (19 of the 27 Member States) than on the trade union side (21 of the 27 Member States). However, the number of sector-related employers' or business organisations across the Member States (104) clearly outweighs the number of sector-related trade unions (81). Overall, the employers' and business organisations are more unevenly distributed among the Member States than the trade unions, in that a number of countries that have only one sector-related employers' or business organisation while a few countries (Austria, Italy and the UK) have 10 or more of such organisations.

Table 6: Domain coverage and membership of employers' and business organisations in construction

		Domain coverage[a]	Membership				
			Type	No. of companies	Companies in sector	No. of employees	Employees in sector
AT	BIB	S	compulsory	12,600	12,600	80,000[c]	80,000[c]
	FVBI	S	compulsory	150	150	30,000[c]	30,000[c]
	BIBHG	S	compulsory	13,856	13,856	25,796	25,796
	BIDGS	S	compulsory	3,207	3,207	16,798	16,798
	BIHPFK	S	compulsory	1,954	1,954	5,740	5,740
	BIHB	S	compulsory	2,109	2,109	10,213	10,213
	BIMT	SO	compulsory	5,901	5,700	20,201	19,000
	BIS	SO	compulsory	781	<781	2,629	<2,600
	BITHG	SO	compulsory	10,000	500	39,000	6,000
	FEEI	SO	compulsory	300	n.a.	60,000	n.a.
	BIEGAK	SO	compulsory	7,700	n.a.	35,000	n.a.
	BISHL	S	compulsory	2,500	2,500	30,900	30,900
	BIM	SO	compulsory	8,381	n.a.	41,000	n.a.
BE	CC/CB	O	voluntary	14,090	13,544	87,863	81,928
	Bouwunie	S	voluntary	8,000	8,000	30,000	30,000
BG	BCC	O	voluntary	2,036	1,689	27,000	23,000
CY	OSEOK	C	voluntary	1,009	1,009	n.a.	n.a.
CZ	SPS v ČR*	C	voluntary	1,290	1,290	125,000[f]	125,000[f]
	SDMSZS*	SO	voluntary	15,000	14,250	n.a.	n.a.
DE	ZDB*	C	voluntary	n.a.	n.a.	n.a.	n.a.
	HDB*	S	voluntary	n.a.	n.a.	n.a.	n.a.
	ZVDH	S	voluntary	7,400	7,400	55,000	55,000
	BV Farbe	SO	n.a.	42,754	n.a.	197,500	n.a.
	ZVSHK	S	voluntary	52,500	52,500	334,000	334,000
	BV Steinmetze	SO	n.a.	2,100	n.a.	11,000	n.a.
	BV Gerüstbau	S	voluntary	n.a.	n.a.	n.a.	n.a.
	BI Gerüst	S	compulsory	n.a.	n.a.	n.a.	n.a.
	DA	SO	voluntary	520	430	n.a.	7,500
DK	Dansk Byggeri*	O	voluntary	6,000	5,520	70,000	n.a.

		Domain coverage[a]	Membership				
			Type	No. of companies	Companies in sector	No. of employees	Employees in sector
	Tekniq	S	voluntary	2,800	2,800	40,000	40,000
	Danske Malermestre	S	voluntary	1,285	1,285	5,700	5,700
	DS H&I*	SO	voluntary	2,250	995	20,000	4,030
	DHV*	SO	voluntary	725	645	2,800	2,400
EE	EEEL	O	voluntary	102	85	7,000	6,000
EL	PEDMEDE*	S	voluntary	6,200	6,200	n.a.	n.a.
	SATE	S	voluntary	930	930	n.a.	n.a.
	STEAT*	S	voluntary	37	37	n.a.	n.a.
ES	CNC	O	voluntary	n.a.	n.a.	n.a.	n.a.
FI	CFCI RT	S	voluntary	2,700	2,700	55,000	55,000
	STTA*	SO	voluntary	164	120	5,900	4,500
	PALTA*	O	voluntary	1,700	25	140,000	600
FR	CAPEB*	S	voluntary	80,000	80,000	150,000	150,000
	SNSO*	S	voluntary	4,000	4,000	120,000	120,000
	FFB*	S	voluntary	57,000	57,000	600,000	600,000
	FNTP*	S	voluntary	8,020	8,020	269,687	269,687
	FFIE*	S	voluntary	5,000	5,000	130,000	130,000
	FSCOP*	S	voluntary	600	600	15,000	15,000
HU	EVOSZ*	C	voluntary	300	300	n.a.	n.a.
	IPOSZ*	SO	voluntary	30,000	1,500	100,000	5,000
IE	CIF	C	voluntary	n.a.	n.a.	n.a.	n.a.
	ECA*	S	voluntary	40	40	n.a.	n.a.
	AECI*	S	voluntary	250	250	n.a.	n.a.
IT	ANCE*	C	voluntary	20,000	20,000	145,000	145,000
	ANAEPA*	S	voluntary	66,000	66,000	64,000	64,000
	CNA UNIONE COSTRUZIONI*	SO	voluntary	65,171	60,172	90,000	83,000
	ANIEM*	O	voluntary	6,000	3,200	60,000	32,000
	FIAE*	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
	CLAAI*	SO	voluntary	107,930	8,350	74,530	1,580

		Domain coverage[a]	Membership				
			Type	No. of companies	Companies in sector	No. of employees	Employees in sector
	ANCPL*	SO	voluntary	1200	400	40,000	20,000
	FEDERLAVORO E SERVIZI*	SO	voluntary	5,300	1,120	185,000	12,900
	AGCI SPL*	SO	voluntary	2,788	n.a.	10,410	n.a.
	AGI*	S	voluntary	n.a.	n.a.	n.a.	n.a.
LT	LSA	O	voluntary	154	120	30,000	24,000
LU	FDA*	O	voluntary	n.a.	1,670	57,331	39,898[d]
	FEDIL*	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
LV	LBA	O	voluntary	98	88	5,000	4,500
MT	FOBC	C	voluntary	9	9	n.a.	n.a.
NL	Bouwend Nederland *	C	voluntary	4,500	4,500	71,000	71,000
	AN*	O	voluntary	1,760	n.a.	40,000	25,000
PL	ZRP*	SO	voluntary	n.a.	21,200	700,000	31,500
	KPB UNI-BUD*	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
PT	AECOPS*	S	voluntary	5,000	5,000	140,000	140,000
	AICCOPN*	O	voluntary	8,000	n.a.	n.a.	n.a.
	FEPICOP*	S	voluntary	13,000	13,000	310,000[d]	310,000[d]
	AICE*	O	voluntary	n.a.	n.a.	n.a.	n.a.
RO	ARACO*	C	voluntary	1,200	1,200	50,000	50,000
	UNPR*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
SE	Almega T*	SO	voluntary	3,900	1	155,000	3,000
	EIO	SO	voluntary	2,700	1,350	26,000	9,000
	GBF	SO	voluntary	550	520	>3,000	3,000
	PE*	S	voluntary	700	700	n.a.	n.a.
	Malaremästarna*	S	voluntary	870	870	8,000	8,000
	PLR	S	voluntary	900	900	1,200	1,200
	BI*	S	voluntary	3,200	3,200	90,000	90,000
	TMF	SO	voluntary	850	700	40,000	35,000
	VVS-Företagen	S	voluntary	1,500	1,500	17,500	17,500

		Domain coverage[a]	Membership				
			Type	No. of companies	Companies in sector	No. of employees	Employees in sector
SI	ZGIGM*	O	voluntary	480	n.a.	n.a.	n.a.
	ZDS*	n.a.	voluntary	n.a.	n.a.	n.a.	n.a.
	SG-OZS*	n.a.	voluntary[b]	n.a.	7,800	n.a.	42,000[d]
SK	ZSPS	O	voluntary	104	70	11,600	8,900
UK	FMB**	S	voluntary	10,000	10,000	50,000[e]	50,000[e]
	NFB**	S	voluntary	1,600	1,600	300,000	300,000
	CECA**	S	n.a.	300	300	n.a.	n.a.
	TICA**	S	voluntary	90	90	6,000	6,000
	ECA**	S	voluntary	2,750	2,750	30,000	30,000
	SBF**	S	n.a.	700	700	n.a.	n.a.
	UKCG**	S	voluntary	34	34	n.a.	n.a.
	HBF**	S	voluntary	160	160	n.a.	n.a.
	NFRC**	S	voluntary	1,000	1,000	18,000	18,000
	LGA**	SO	voluntary	350	40	1,200,000	4,000
	NASC**	S	voluntary	220	220	13,000	13,000
	PDA**	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	SELECT**	S	voluntary	1,800	1,800	12,000	12,000
	ECIA**	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Notes: Data for 2011, 2012 or 2013 as available.

** Domain overlap with other sector-related employer/business organisations; ** No information on domain overlaps provided; [a] Domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism (for details see Table 2); [b] Compulsory until autumn 2013; [c] FIEC suggests 250,000 employees employed by member companies; [d] Figure doubtful; [e] Rough estimate provided by EBC; [f] Figure questioned by EBC; n.a. = not available.*

Source: EIRO/EurWORK national correspondents (2013–2014), administrative data and estimates.

Table 7: Density and affiliations of employers' and business organisations in construction

		Density			National affiliations***	European affiliations****
		Companies	Employees			
		Sector (%)	Sector (%)	Sectoral domain in relation to overall domain		

		Density			National affiliations***	European affiliations****
		Companies	Employees			
		Sector (%)	Sector (%)	Sectoral domain in relation to overall domain		
AT	BIB	40.4	24.5	n/a	WKÖ	FIEC, EUROFM
	FVBI	0.5	9.2	n/a	WKÖ	FIEC, (EIC)
	BIBHG	44.4	7.6	n/a	WKÖ	FESI, UEEP, EUFA P+F
	BIDGS	10.3	5.2	n/a	WKÖ	
	BIHPFK	6.1	1.7	n/a	WKÖ	VEUKO
	BIHB	6.7	3.1	n/a	WKÖ	EFTC
	BIMT	18.3	5.8	equal	WKÖ	
	BIS	<2.6	<0.8	equal	WKÖ	EACD
	BITHG	1.6	1.8	equal	WKÖ	
	FEEI	n.a.	n.a.	equal	WKÖ	
	BIEGAK	n.a.	n.a.	equal	WKÖ	
	BISHL	8	9.4	n/a	WKÖ	
	BIM	n.a.	n.a.	equal	WKÖ	
BE	CC/CB	14.7	33.7	n.a.	FEB	FIEC
	Bouwunie	8.7	12.3	n/a	Unizo	EBC
BG	BCC	8.6	16.2	>	BIA, CEIBG, BCCI	FIEC
CY	OSEOK	15	n.a.	n/a	OEB,	FIEC
CZ	SPS v ČR*	0.6	49.2[d]	n/a	KZPS	FIEC
	SDMSZS*	6.2	n.a.	n.a.	HK ČR, UZS ČR	EBC
DE	ZDB*	n.a.	n.a.	n/a	BDA, UDH	FIEC, FESI, EUF
	HDB*	n.a.	n.a.	n/a	BDA, BDI	FIEC, EIC, EFFC, FESI
	ZVDH	1.9	3.4	n/a		(UEAPME)
	BV Farbe	n.a.	n.a.	n.a.	BDA	UNIEP
	ZVSHK	13.6	20.4	n/a		
	BV Steinmetze	n.a.	n.a.	n.a.		

		Density			National affiliations***	European affiliations****
		Companies	Employees			
		Sector (%)	Sector (%)	Sectoral domain in relation to overall domain		
	BV Gerüstbau	n.a.	n.a.	n/a		
	BI Gerüst	n.a.	n.a.	n/a		
	DA	0.1	0.5	n.a.		EDA
DK	Dansk Byggeri*	17.5	n.a.	equal	DA	FIEC
	Tekniq	8.9	30.4	n/a	DA	
	Danske Malermestre	4.1	4.3	n/a	DA	
	DS H&I*	3.1	3.1	equal	HVR	
	DHV*	2	1.8	equal	HVR	
EE	EEEL	1.1	11.8	n.a.	ETTK, EKT	FIEC
EL	PEDMEDE*	5.5	n.a.	n/a		FIEC, EIC
	SATE	0.8	n.a.	n/a		
	STEAT*	0	n.a.	n/a		
ES	CNC	n.a.	n.a.	n.a.	CEOE, CEPYME	FIEC, EBC
FI	CFCI RT	6.4	41.1	n/a	EK	FIEC
	STTA*	0.3	3.4	>		
	PALTA*	0.1	0.4	>	EK	
FR	CAPEB*	17.5	10	n/a	UPA	EBC
	SNSO*	0.9	8	n/a		EBC
	FFB*	12.5	40.1	n/a	MEDEF, CGPME	FIEC
	FNTP*	1.8	18	n/a	MEDEF, CGPME	FIEC
	FFIE*	1.1	8.7	n/a	(MEDEF, CGPME	(FIEC)
	FSCOP*	0.1	1	n/a	CG SCOP	CECOP
HU	EVOSZ*	0.3	n.a.	n/a		FIEC
	IPOSZ*	1.5	4.3	n.a.		EBC

		Density			National affiliations***	European affiliations****
		Companies	Employees			
		Sector (%)	Sector (%)	Sectoral domain in relation to overall domain		
IE	CIF	n.a.	n.a.	n/a		FIEC
	ECA*	n.a.	n.a.	n/a		
	AECI*	n.a.	n.a.	n/a		
IT	ANCE*	3.3	12.8	n/a	CONFINDUSTRIA	FIEC, EIC, ERMCO, UEPC
	ANAEPA*	10.9	5.6	n/a	Confartigianato Imprese	EBC
	CNA UNIONE COSTRUZIONI*	9.9	7.3	>	CNA	EBC
	ANIEM*	0.5	2.8	>	CONFIMI IMPRESA	
	FIAE*	n.a.	n.a.	n.a.	CASARTIGIANI	
	CLAAI*	1.4	0.1	<		
	ANCPL*	0	1.8	>	LEGACOOP	CECOP
	FEDERLAVORO E SERVIZI*	0.2	1.1	<	CONFCOOPERATIVE	CECOP
	AGCI SPL*	n.a.	n.a.	n.a.	AGCI C	ECOP
	AGI*	n.a.	n.a.	n/a		FIEC, EIC
LT	LSA	2	30	n.a.	LPK	FIEC
LU	FDA*	55.2	About 100	>		EBC, UEAPME
	FEDIL*	n.a.	n.a.	n.a.		FIEC
LV	LBA	1.3	8.9	n.a.	LDDK, LTRK	EBC
MT	FOBC	0.2	n.a.	n/a		FIEC
NL	Bouwend Nederland *	6.2	15	n/a	VNO-NCW, MKB-Nederland	FIEC
	AN*	n.a.	5.3	equal		EBC
	ZRP*	9.2	3.1	>		EBC
PL	KPB UNI-BUD*	n.a.	n.a.	n.a.		FIEC

		Density			National affiliations***	European affiliations****
		Companies	Employees			
		Sector (%)	Sector (%)	Sectoral domain in relation to overall domain		
PT	AECOPS*	13.9	52	n/a		(FIEC), AIE, GCI-UICP
	AICCOPN*	n.a.	n.a.	n.a.	AEP	(FIEC)
	FEPICOP*	36	About 100	n/a		FIEC
	AICE*	n.a.	n.a.	n.a.		UEPC
RO	ARACO*	2.8	10	n/a	ACPR	FIEC
	UNPR*	n.a.	n.a.	n.a.		EBC
SE	Almega T*	0	1.2	n.a.	Svenskt Näringsliv	Eurociett
	EIO	1.5	3.7	>	Svenskt Näringsliv	
	GBF	0.6	1.2	n.a.		UEMV, FAECF, EuroWindoor
	PE*	0.8	n.a.	n/a	Företagarna	
	Malaremästarna*	1	3.3	n/a		
	PLR	1	0.5	n/a	Svenskt Näringsliv, Företagarna	GCI-UICP
	BI*	3.7	37.1	n/a	Svenskt Näringsliv	FIEC, EIC
	TMF	0.8	14.4	<	Svenskt Näringsliv	CEI-Bois, EFIC, FEMIB
	VVS-Företagen	1.7	7.2	n/a	Svenskt Näringsliv	GCI-UICP
SI	ZGIGM*	n.a.	n.a.	n.a.	GZS	FIEC
	ZDS*	n.a.	n.a.	n.a.	ZDS	
	SG-OZS*	41.4	About 100	n.a.	OZS	EBC, VEUKO
SK	ZSPS	0.1	6.7	>	RUZ SR	FIEC
UK	FMB**	3.7	n.a.	n/a	CBI	EBC
	NFB**	0.6	n.a.	n/a		FIEC[d]
	CECA**	0.1	n.a.	n/a		
	TICA**	0	n.a.	n/a		FESI, EiiF

		Density			National affiliations***	European affiliations****
		Companies	Employees			
		Sector (%)	Sector (%)	Sectoral domain in relation to overall domain		
	ECA**	1	n.a.	n/a	CBI	AIE, CENELEC, UEAPME
	SBF**	0.3	n.a.	n/a	CBI	
	UKCG**	0	n.a.	n/a	CBI	
	HBF**	0.1	n.a.	n/a	CBI	UEPC
	NFRC**	0.4	n.a.	n/a		IFD
	LGA**	0	n.a.	<		CEEP
	NASC**	0.1	n.a.	n/a		UEG
	PDA**	n.a.	n.a.	n.a.		
	SELECT**	0.7	n.a.	n/a	CBI	AIE
	ECIA**	n.a.	n.a.	n.a.		

Notes: Data for 2011, 2012 or 2013 as available.

** Domain overlap with other sector-related employers' or business organisations; ** No information on domain overlaps provided; *** Only cross-sectoral (that is, peak-level) associations are listed; **** Affiliation in parenthesis means indirect affiliation via higher order unit; [a] Until about 2012; [b] No FIEC member, but tied to FIEC by a cooperation agreement; [c] Figure questionable; [d] Figure questioned by EBC; n.a. = not available; n/a = not applicable*

Source: EIRO/EurWORK national correspondents (2013–2014), administrative data and estimates

The membership domains of the employers' and business organisations tend to be narrower than those of the sector-related trade unions. In contrast to organised labour, membership domains which are sectionalist relative to the sector – at least in relative terms – prevail among the employers' organisations, with a share of 49% of the cases for which related information is available; 15.6 % and 26%, respectively, of the associations rest on overlapping and sectionalistically overlapping domains relative to the sector (Figure 5). No organisation in the sector has a domain that is cross-sectoral.

Most cases of domain overlaps (in the case of organisations with domains either overlapping or sectionalistically overlapping relative to the sector) are caused by:

- coverage of (part of) the broader defined building and construction sector, including also the manufacture of building materials (as is the case of BCC of Bulgaria, CNA UNIONE and ANIEM of Italy, LBA of Latvia, ZGIGM of Slovenia and CNC of Spain), architecture (as is the case of Portugal's AICE and Slovakia's ZSPS) and a number of distinct and very specialised activities related to construction in a broad sense, such as metal engineering (see Austria's BIM), carpentry activities (see SDMSZS of the Czech Republic and TMF of

Sweden), monument preservation (as is the case of Germany's BV Farbe and BV Steinmetze) and recycling activities (see DA of Germany);

- coverage of (part of) the whole 'industry' sector (as is the case of Dansk Byggeri and DS H&I of Denmark and LSA of Lithuania).

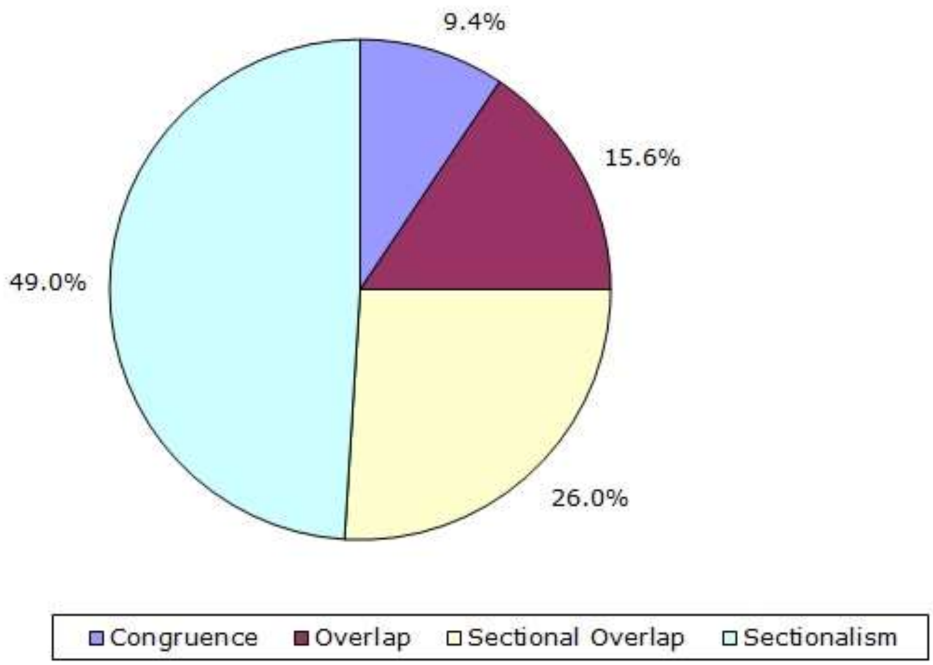
There are also several employers' or business organisations whose domain is focused on a particular segment of the economy which sectionally overlaps the construction sector. Such organisations may cover the cooperative sector (such as ANCPL, FEDERLAVORO and AGCI of Italy), all kinds of artisan activities (see IPOSZ of Hungary, CLAAI of Italy, FDA of Latvia and ZRP of Poland), training and education activities (as is the case of EEEL of Estonia, again LSA of Lithuania and again LBA of Latvia) and local/ regional government services (as is the case of LGA in the UK).

Sectionalism, the prevailing domain pattern relative to the construction sector among the sector-related employers' and business organisations, is caused by domain demarcations that focus on a particular subsector or segment of the construction sector, without covering areas of business activity outside the sector. Such subsectors or segments may be defined by:

- size class of construction enterprises such as SMEs (as is the case of Austria's BIB, Belgium's Bouwunie, France's CAPEB and SNSO, and FMB in the UK) or large companies (as is the case of FVBI of Austria and ASI of Italy);
- ownership structure of the construction enterprises such as private sector companies (as is the case of all employers' organisations in Austria as well as Portugal's AECOPS and FEPICOP);
- highly specialised activities within the construction sector, such as roofing (see Austria's BIDGS, Germany's ZVDH and Sweden's PLR), sanitary and heating engineering activities (see Austria's BISHL and Germany's ZVSHK), electrical (engineering) activities (see Tekniq of Denmark, FFIE of France, ECA and AECI of Ireland, as well as ECA in the UK) and civil engineering activities (as is the case of FNTP of France and CECA in the UK).

Finally, 9.4% of the associations have a membership domain that is more or less congruent with the sector definition (Figure 5). This means that the domain of these organisations largely covers the construction sector as defined for the purpose of this study.

Figure 5: Distribution of membership domain patterns of sector-related employers' organisations in construction



Notes: Percentages are rounded; N = 96.

Source: EIRO/EurWORK national reports (2013–2014)

In several countries, the sectoral employers have managed to establish specific employers' organisations as a particular voice of narrow and distinct business activities within the construction sector. Accordingly, almost 59% of the employers' and business organisations for which information is available have delimited their domain in terms of business activities in that they do not cover all activities within the construction sector. Moreover, some 49% of the organisations for which information has been provided do not represent all (legal) forms of companies in the sector (in most cases focusing on particular size classes of enterprises), while domain demarcations in terms of territorial coverage play only a minor role.

In countries with a highly fragmented and differentiated associational 'landscape' on the employer side – such as Austria, Germany, France, Italy, Sweden and the UK – the associations' domains tend to be tailor-made for a particular subgroup of employers and businesses within the sector. More strikingly than on the side of organised labour, this enables these associations to perform a very individualised interest representation on behalf of their members, although their membership strength may vary widely from one organisation to the other. Such a fragmented associational configuration tends to favour the (bargaining) power of organised business in small segments of the economy.

Membership is compulsory for all 13 sector-related employers' organisations in Austria and one in Germany (BI Gerüstbau) (Table 6). In the case of the Austrian associations, this is due to their public law status as chamber units. In case of BI Gerüstbau, membership is mandatory due to its public law status as a guild. As far as related information has been provided, membership of all the other sector-related employers' or business organisations is voluntary (Table 6).

In those countries with a pluralist structure in relation to employers' organisations, these associations have usually managed to arrive at non-competing and collaborative relationships; the exceptions are SPS v ČR and SDMSZS of the Czech Republic as well as several associations of Italy. Their activities are complementary to each other as a result of inter-associational differentiation by membership demarcation (as is the case, in particular, of Austria, France, Germany, Italy, Sweden and the UK) than by functions and tasks.

As the figures on membership totals (Table 6) and density (Table 7) indicate, membership strength in terms of both companies and employees varies widely in terms of the membership domain in general and the sector. Again, as outlined earlier in the context of the trade unions, density figures rather than absolute membership numbers are informative in terms of membership strength.

In the case of the sector-related employers' and business organisations, the sectoral densities of both companies and employees (employed by these companies) can be calculated. However, the lack of absolute numbers of members, in particular in terms of employees, in the construction sector in the case of many associations means that sectoral densities can only be calculated only for some of them.

According to the figures available, about 70% and about 53%, respectively, of the employers' and business organisations have a sectoral density in terms of companies and employees of 5% or less (Table 7). Whereas the median of the organisations' sectoral densities in terms of companies lies at 1.4%, the corresponding median in terms of employees stands at 4%. This does not necessarily infer overall very low densities of the sector-related employers' and business organisations in construction, since sectoral densities (in contrast to sectoral domain densities) tend to decline with increasing levels of associational fragmentation. Higher sectoral densities in terms of employees compared with those in terms of companies indicate a higher propensity by the larger companies to associate than their smaller counterparts.

As for the sector-related trade unions, some tentative information on the sectoral domain density of the employers' and business organisations in relation to their overall domain density is available for those associations with a domain (sectionalistically) overlapping with regard to the sector. But because related information has only been provided for very few employers' and business organisations, these data should be treated with caution.

In contrast to the situation on the trade union side, the sectoral domain densities, at least in terms of employees, of the employers' and business organisations tend to be higher than or at least equal to their overall domain densities in the vast majority (that is, 83.3%) of cases for which related information has been provided. These, albeit very tentative, results indicate that, unlike the trade union side, the construction sector may constitute a stronghold of many of those employers' and business organisations with a domain (sectionalistically) overlapping with regard to the sector. This corresponds with the fact that many sector-related employers' and business organisations tailored their membership domain to the construction sector (or part of it) so as to align their policy of interest representation with the specific requirements of their members.

Collective bargaining and its actors

Table 8 lists all the trade unions engaged in sector-related collective bargaining. Despite numerous cases of inter-union domain overlap and some cases of unclear domain demarcation, inter-union rivalry and competition for bargaining capacities was identified in only a few countries such as Finland, France, Malta and Portugal.

Eight Member States (Czech Republic, Estonia, France, Italy, Latvia, Lithuania, Malta and Portugal) have an employers' or business organisation that is not a party to collective bargaining (Table 9). Although this is the only employers' or business organisation identified in the case of Estonia, Latvia and Malta, all three report being consulted regularly. No information on collective bargaining involvement was provided for three organisations (FEDIL of Luxembourg, KPB UNI-BUD of Poland and UNPR of Romania). Those associations not involved in sector-related collective bargaining are classified as social partner organisations in this report only because of their affiliation to at least one of the sector-related European-level employers' organisations, FIEC and EBC. In the case of the sector-related employer organisations, cases of such rivalry have been reported from countries such as the Czech Republic, Finland, Ireland and Italy. Conversely, in at least 23 of the 27 Member States which record one or more sector-related employers' or business organisations, at least one of them is engaged in sector-related collective bargaining.

Table 8: Collective bargaining, consultation and affiliations of trade unions in construction

	Trade union	Collective bargaining[a]	Collective bargaining coverage (total)[b]	Consultation / frequency	National affiliations**	European affiliations***
AT	GBH	M	n.a.	n.a.	ÖGB	EFBWW
	PRO-GE	M	48,000	regularly	ÖGB	IndustriAll Europe, EFFAT
	GPA-djp	M	n.a.	n.a.	ÖGB	IndustriAll Europe, EPSU, EFFAT, EFJ, UNI Europa
BE	FGTB-CG/ABVV-AC*	M+S	165,000	regularly	FGTB	EFBWW
	CGSLB/ACLVB*	M+S	165,000	regularly		EFBWW, EFFAT, ETF
	CSC/ACV Building, Industry & Energy*	M+S	165,000	regularly	CSC/ACV	EFBWW, IndustriAll Europe, UNI Europa
BG	FITUC*	M+S	3,300	yes/ n.a.	CITUB	EFBWW
	FCIW-Podkrepa*	M+S	3,300	yes/ n.a.	Podkrepa	EFBWW, EPSU
CY	DWUBC*	M+S	40,000	ad hoc	DEOK	
	CWU*	M+S	40,000	ad hoc	PEO	
	OOIMSEK*	M+S	40,000	ad hoc	SEK	EFBWW
CZ	OS STAVBA	M+S	175,000	ad hoc	ČMKOS	EFBWW
DE	IG BAU*	M+S	n.a.	ad hoc	DGB	EFBWW
	IG Metall*	M+S	n.a.	ad hoc	DGB	EFBWW

	Trade union	Collective bargaining[a]	Collective bargaining coverage (total)[b]	Consultation / frequency	National affiliations**	European affiliations***
	CGM*	M+S	n.a.	n.a.	CGB	CESI
DK	DEF	M+S	21,500	ad hoc + regularly	LO	EFBWW
	Blik & Roer	M+S	12,000	regularly	LO	EFBWW
	3F	M+S	65,000	ad hoc + regularly	LO	EFBWW, IndustriAll Europe, UNI Europa, EFFAT
	Dansk Metal	M+S	1,700	ad hoc + regularly	LO	IndustriAll Europe
	Malerforbund et	M+S	8,000	regularly	LO	EFBWW
	HK Privat	M+S	2,200	regularly	LO	UNI Europa
EE	ETTA	S	815	ad hoc	EAKL	ETF, EPSU
EE	EEAÜL	S	2,161	no	EAKL	EPSU, IndustriAll Europe
EL	GFBRP	M	n.a.	ad hoc	GSEE	
	HFOMD	M	n.a.	no	GSEE	
ES	MCA-UGT*	M+S	654,412	regularly	UGT	EFBWW
	FECOMA-CCOO*	M+S	n.a.	n.a.	CCOO	EFBWW
	ELA-HAINBAT*	M	n.a.	n.a.		EFBWW
	FCM-CIG*	M	n.a.	no	CIG	
FI	FCTU	M	82,000	regularly	SAK	EFBWW
	Pro*	M	20,000	regularly	STTK	EFBWW, EPSU, EFFAT, IndustriAll Europe, UNI Europa, ETF
	FEWU	M	13,000	ad hoc	SAK	EFBWW, UNI Europa, IndustriAll Europe
	JHL	M+S	3,000	no	SAK	EPSU
	YTN*	M+S	15,000	no	AKAVA	(IndustriAll Europe)
	Pardia	M+S	3,000	no	STTK	EPSU

	Trade union	Collective bargaining[a]	Collective bargaining coverage (total)[b]	Consultation / frequency	National affiliations**	European affiliations***
FR	FO Construction*	M+S	1,440,000	n.a.	CFDT	EFBWW
	FNCB-CFDT*	M+S	1,440,000	ad hoc	CFDT	EFBWW
	BATI-MAT-TP CFTC*[c]	M+S	1,440,000	no	CFTC	EFBWW
	FNS Construction*[c]	M+S	1,440,000	n.a.	CGT	EFBWW
	CFE-CGC BTP*	M+S	1,440,000	no	CFE-CGC	FECC
HU	EFEDOSZSZ	M	115,700	ad hoc	MSZOSZ	EFBWW, IndustriAll Europe
IE	SIPTU*	M+S	n.a.	regularly	ICTU	EFBWW
	OPATSI	M+S	n.a.	regularly	ICTU	
	BATU*	M+S	n.a.	regularly	ICTU	
	UCATT*	M+S	n.a.	regularly	ICTU	
	TEEU	M+S	n.a.	regularly	ICTU	
IT	FILLEA CGIL*	M	1,100,000	ad hoc	CGIL	EFBWW
	FILCA CISL*	M	1,100,000	yes/ n.a.	CISL	EFBWW
	FENEAL UIL*	M	1,100,000	yes/ n.a.	UIL	EFBWW
	UGL COSTRUZIONI*	M	n.a.	n.a.	UGL	
	FESICA*	M	n.a.	n.a.	CONFSAL	
LT	LSPS	S	n.a.	ad hoc	LPSK	
LU	SB-OGBL*	M	n.a.	yes/ n.a.	OGBL	EFBWW
	LCGB-CA*	M	n.a.	yes/ n.a.	LCGB	EFBWW
LV	LCA*	S	n.a.	regularly		EFBWW
	LCDAA*	S	1,885	regularly	LBAS	
MT	GWU*	S	n.a.	regularly		EFBWW, ETF, EFFAT, EPSU, Eurocadres, UNI Europa, EURO WEA, FERPA, SCECBU, IndustriAll Europe

	Trade union	Collective bargaining[a]	Collective bargaining coverage (total)[b]	Consultation / frequency	National affiliations**	European affiliations***
	UHM*	S	n.a.	yes/ n.a.	CMTU	EUROFEDOP
NL	FNV Bouw*	M+S	118,840	ad hoc	FNV	EFBWW
	CNV Vakmensen*	M+S	118,840	ad hoc	CNV	EFBWW
PL	Budowlani*	S	40,000	regularly	OPZZ	EFBWW
	SBiPD*	S	n.a.	regularly	NSZZ Solidarnosc	EFBWW
PT	SETACCOP*	M+S	140,000	ad hoc	UGT	EFBWW
	FEVICCOM*	M	n.a.	n.a.	CGTP-IN	
	SQTD*	M+S	n.a.	n.a.	CGTP-IN	
RO	FGS Familia	M+S	100,000	ad hoc	CNS Cartel Alfa	EFBWW
SE	ST	M+S	n.a.	no	TCO	ETF, EPSU, UNI Europa
	Ledarna*	M+S	9,500	regularly		CEC
	Elektrikerna	M	10,000	regularly		EFBWW
	Byggnads*	M+S	60,000	regularly	LO	EFBWW
	GS	M	n.a.	ad hoc	LO	EFBWW
	SPU	M+S	13,000	regularly	LO	EFBWW
	TJ	M	600	no	SACO	Eurocadres
	SEKO	M+S	25,000	regularly	LO	EFBWW, EBTS
	SAGE*	M+S	2,000	ad hoc	SACO	IndustriAll Europe, UNI Europa, Eurocadres, FEANI
	Unionen*	M+S	15,000	ad hoc		EFBWW
SI	SDGD	M+S	54,000	ad hoc	ZSSS	EFBWW
SK	IOZ	M+S	n.a.	regularly	KOZ SR	EFBWW
UK	GMB*	M+S	20,000	regularly	TUC, CSEU	EFBWW, EFFAT, EPSU, IndustriAll Europe, ETF, UNI Europa
	UCATT*	M+S	500,000	ad hoc	TUC	EFBWW

	Trade union	Collective bargaining[a]	Collective bargaining coverage (total)[b]	Consultation / frequency	National affiliations**	European affiliations***
	UNITE*	M+S	n.a.	ad hoc	TUC	EFBWW, UNI Europa, IndustriAll Europe, EPSU, EFFAT, ETF

*Notes: Notes: Data for 2011, 2012 or 2013 as available. * Domain overlap with other sector-related trade unions; ** Only cross-sectoral (that is, peak level) associations are listed; *** Affiliation put in parenthesis means indirect affiliation via higher or lower order unit; [a] Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining; [b] Number of employees covered by collective agreements concluded by the union within the construction sector; [c] Union representative contacted refused to give (part of) the requested information; n.a. = not available*

Source: EIRO/EurWORK national correspondents (2013–2014), administrative data and estimates

Table 9: Collective bargaining and consultation of employers' and business organisations in construction

	Name of organisation	Collective bargaining[a]	Coverage[b]		Consultation/ frequency
			Number of companies	Number of employees	
AT	BIB	M	12,600	80,000	regularly
	FVBI	M	150	30,000	regularly
	BIBHG	M	13,856	26,000	regularly
	BIDGS	M	3,200	16,800	regularly
	BIHPFK	M	2,000	5,740	regularly
	BIHB	M	2,100	10,200	regularly
	BIMT	M	5,900	20,000	regularly
	BIS	M	<800	<2,700	regularly
	BITHG	M	500	6,000	ad hoc
	FEEI	M	n.a.	n.a.	n.a.
	BIEGAK	M	n.a.	n.a.	n.a.
	BISHL	M	2,500	30,900	n.a.
	BIM	M	n.a.	n.a.	n.a.
BE	CC/CB	M	29,307	177,588	ad hoc + regularly
	Bouwunie	M+S	30,000	152,000	ad hoc + regularly
BG	BCC	M	60	3,000	yes/ n.a.
CY	OSEOK	M	1,108	32,800	ad hoc

	Name of organisation	Collective bargaining[a]	Coverage[b]		Consultation/ frequency
			Number of companies	Number of employees	
CZ	SPS v ČR*	M	n.a.	n.a.	ad hoc
	SDMSZS*	no	0	0	ad hoc + regularly
DE	ZDB*	M	74,000	660,000	ad hoc + regularly
	HDB*	M	74,424	655,714	ad hoc + regularly
	ZVDH	M	12,600	90,000	ad hoc + regularly
	BV Farbe	M	n.a.	n.a.	n.a.
	ZVSHK	M	n.a.	n.a.	n.a.
	BV Steinmetze	M	n.a.	n.a.	n.a.
	BV Gerüstbau	M	n.a.	n.a.	n.a.
	BI Gerüst	M	n.a.	n.a.	n.a.
	DA	M	1,100	10,000	ad hoc
DK	Dansk Byggeri*	M	5,520	n.a.	regularly
	Tekniq	M	2,800	40,000	ad hoc + regularly
	Danske Malermestre	M	1,285	5,700	regularly
	DS H&I*	M	995	4,030	regularly
	DHV*	M	645	2,400	regularly
EE	EEEL	no	0	0	regularly
EL	PEDMEDE*	M[c]	n.a.	n.a.	ad hoc
	SATE	M	n.a.	n.a.	ad hoc
	STEAT*	M[c]	n.a.	n.a.	no
ES	CNC	M	n.a.	n.a.	regularly
FI	CFCI RT	M	30,000	130,000	regularly
	STTA*	M	4,000	11,000	regularly
	PALTA*	M	25	600	no
FR	CAPEB*	M	198,029	1,444,000	ad hoc + regularly
	SNSO*	no	0	0	regularly
	FFB*	M	198,029	1,44,4000	ad hoc
	FNTP*	M	n.a.	n.a.	ad hoc
	FFIE*	M	198,029	1,444,000	regularly
	FSCOP*	M	198,029	1,444,000	regularly
HU	EVOSZ*	M	98,654	115,700	ad hoc
	IPOSZ*	M	98,654	115,700	ad hoc

	Name of organisation	Collective bargaining[a]	Coverage[b]		Consultation/ frequency
			Number of companies	Number of employees	
IE	CIF	M+S	n.a.	n.a.	regularly
	ECA*	M+S	n.a.	n.a.	regularly
	AECI*	M+S	n.a.	n.a.	regularly
IT	ANCE*	M	130,000	400,000	n.a.
	ANAEPA*	M	90,000	190,000	ad hoc + regularly
	CNA UNIONE COSTRUZIONI *	M	90,000	190,000	ad hoc + regularly
	ANIEM*	M	6,000	60,000	ad hoc
	FIAE*	M	n.a.	n.a.	n.a.
	CLAAI*	M	152,500	459,500	ad hoc + regularly
	ANCPL*	M	n.a.	n.a.	ad hoc
	FEDERLAVORO E SERVIZI*	M	1,120	12,900	ad hoc + regularly
	AGCI SPL*	M	n.a.	n.a.	yes/n.a.
	AGI*	no	0	0	n.a.
LT	LSA	no	0	0	ad hoc
LU	FDA*	M+S	1,670	39,898[e]	regularly
	FEDIL*	n.a.	n.a.	n.a.	n.a.
LV	LBA	no	0	0	regularly
MT	FOBC	no	0	0	regularly
NL	Bouwend Nederland*	M	n.a.	n.a.	ad hoc
	AN*	M	n.a.	n.a.	ad hoc
	ZRP*	yes	n.a.	n.a.	ad hoc
PL	KPB UNI-BUD*	n.a.	n.a.	n.a.	regularly
PT	AECOPS*	M	13,000	140,000	ad hoc
	AICCOPN*	M	13,000	n.a.	n.a.
	FEPICOP*	no	0	0	ad hoc
	AICE*	M	13,000	140,000	n.a.
RO	ARACO*	M+S	1,200	100,000	ad hoc
	UNPR*	n.a.	n.a.	n.a.	n.a.
SE	Almega T*	M	1	3,000	regularly
	EIO	M	1,350	9,000	regularly

	Name of organisation	Collective bargaining[a]	Coverage[b]		Consultation/ frequency
			Number of companies	Number of employees	
	GBF	M	520	n.a.	ad hoc
	PE*	M	700	n.a.	ad hoc
	Malaremästarn a*	M	870	n.a.	ad hoc
	PLR	M	900	1,200	regularly
	BI*	M	3,200	90,000	regularly
	TMF	M	700	35,000	regularly
	VVS-Företagen	M	1,500	17,500	ad hoc
SI	ZGIGM*	M+S	18,826	54,000	ad hoc
	ZDS*	M+S	n.a.	n.a.	ad hoc
	SG-OZS*	M+S	7,800	42,000	ad hoc
SK	ZSPS	M	70	8,900	ad hoc + regularly
UK	FMB**	M	10,000	n.a.	regularly
	NFB**	M	n.a.	n.a.	regularly
	CECA**	M	n.a.	500,000	regularly
	TICA**	M	90	6,000	regularly
	ECA**	M	1,100	25,000	regularly
	SBF**	M	400	n.a.	regularly
	UKCG**	M	n.a.	500,000	ad hoc
	HBF**	M	n.a.	600,000	regularly
	NFRC**	M	4,000	250,000	regularly
	LGA**	M	40	4,000	no
	NASC**	M	n.a.	n.a.	ad hoc
	PDA**	M	n.a.	n.a.	n.a.
	SELECT**	M	n.a.	n.a.	regularly
	ECIA**	M	n.a.	n.a.	n.a.

*Notes: Data for 2011, 2012 or 2013 as available. * Domain overlap with other sector-related employers' or business organisations; ** No information on domain overlaps provided; [a] Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining; [b] Number of companies/employees covered by collective agreements concluded by the employers' organisation within the construction sector; n.a. = not available.*

Source: EIRO/EurWORK national correspondents (2013–2014), administrative data and estimates

Table 10 provide an overview of the system of sector-related collective bargaining in the 27 countries under consideration.

The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy as described in the book National labour relations in internationalised markets by Traxler, Blaschke and Kittel. Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

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

The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes which widen the scope of a collective agreement to employers not affiliated to the signatory employers' organisation; extension regulations targeting the employees are therefore not included in the research. Regulations concerning the employees are not significant to this analysis for two reasons. Firstly, extending a collective agreement to those employees who are not unionised in the company covered by the collective agreement is a standard of the International Labour Organization (ILO), aside from any national legislation. Secondly, employers have good reason to extend a collective agreement they concluded even when they are not formally obliged to do so; otherwise, they would introduce an incentive for their workforce to unionise.

As explained in the work by Traxler, Blaschke and Kittel, compared with employee-related extension procedures, schemes that target the employers are far more significant for the strength of collective bargaining in general and multi-employer bargaining in particular. This is because the employers are capable of refraining from both joining an employers' organisation and entering single-employer bargaining in the context of a purely voluntaristic system. Therefore, employer-related extension practices increase the coverage of multi-employer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employers' organisation. Such a move then enables them to participate in the bargaining process and to benefit from the organisation's related services in a situation where the respective collective agreement will bind them in any case.

Table 10: System of sectoral collective bargaining

Country	CBC (%) (estimates)	Share of MEB in total CBC (%) (estimates)	Extension practices[a]
AT	100	100	(2)
BE	100	100[b]	2
BG	2.3	prevailing	0
CY	n.a.	prevailing	0
CZ	68.9	100[b]	2
DE	53–70	95	2
DK	~65	prevailing	0
EE	2–6	0	0
EL	n.a.	prevailing	0
ES	almost 100	98,6	2
FI	90	95	2
FR	almost 100	almost 100	2
HU	100	100[b]	2
IE	n.a.	n.a.	2[i]
IT	100	100	(2)
LT	~5	0	0
LU	~80	100	2
LV	3.6	0	0
MT	n.a.	0	0
NL	100	100	2
PL	~5	0	0
PT	80–100	prevailing[c]	0[d]
RO	~50[e]	~40[e]	0[f]
SE	~90	>90	1
SI	almost 100	almost 100	0[g]
SK	10–30	100[b]	0
UK	~40	>90	0[h]

Notes: Data from 2012–2013. CBC = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector; MEB = multi-employer bargaining relative to single-employer bargaining; Extension practices (including functional equivalents to extension provisions, that is, obligatory membership and labour court rulings); [a] 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalents are in parentheses; [b] Complemented by single-employer bargaining; [c] Almost 100% until 2010; [d] Pervasive until 2010; [e] 100% until 2011, when the new social dialogue law came into effect; [f] Pervasive until

2011, when the new social dialogue law came into effect; [g] No legal provision for extension procedures in the sector, but multi-employer collective agreements are usually informally used by non-affiliated parties in the sector; [h] No legal provision for extension procedures in the sector; however, many employers that are not party to collective agreements implement part or all of their terms; [i] Pervasive until May 2013; n.a. = not available.

Source: EIRO/EurWORK national correspondents (2013–2014), administrative data and estimates

Collective bargaining coverage

Of the 23 countries with data available, 12 had a rate of 80% or more for the sector's collective bargaining coverage (Table 10). This group of countries comprises Austria, Belgium, Finland, France, Hungary, Italy, Luxembourg, the Netherlands, Portugal, Slovenia, Spain and Sweden.

Conversely, five countries had a rate of less than 10% for collective bargaining coverage. These countries are Bulgaria, Estonia, Latvia, Lithuania and Poland.

A third group of countries had medium range rates of between 40% and 70%, including countries such as the Czech Republic, Denmark, Germany, Romania and the UK. Slovakia, with an estimated collective bargaining coverage of 10–30%, is difficult to classify.

No data were provided for four countries (Cyprus, Greece, Ireland and Malta).

Until recently, Greece recorded high collective bargaining coverage rates in the construction sector. However, with the introduction of the Economic Stability Mechanism and the First Memorandum 2011 agreed with the so-called 'Troika' of the International Monetary Fund ((IMF), the European Central Bank (ECB) and the European Commission (EC), the practice of extending multi-employer agreements was eliminated. Collective bargaining coverage in the sector is thought to having declined rapidly since 2012, but the actual rate is not available.

In Portugal, the rate of collective bargaining coverage is likely to have dropped somewhat in 2011 as a result of the reform of the collective bargaining regulation enacted under the regime of the Memorandum of Understanding between the Troika and the Portuguese government. Accordingly, the government stopped issuing extension decrees for the collective agreement in in the construction sector in 2011. Under the new regulation, collective agreements cover only those companies that are affiliated to the employers' organisations that sign them.

Similarly, in Romania, the Social Dialogue Act of 2011 abolished the national unique collective agreement, which served as a reference point for collective bargaining at all levels, as well as the practice of extending multi-employer agreements. As a consequence, the collective bargaining coverage rate in the construction sector fell from 100% in 2011 to about 50% in 2012.

In Ireland, a key characteristic of the sector up until 2013 was the presence of two Registered Employment Agreements (REAs), one for construction and one for electrical contracting, which set out legally binding terms and conditions for certain grades in the sector. Under the REA system, employer and trade union groups in a particular sector could make an agreement on a wide range of pay and working conditions and have it applied as a legally binding minimum standard for the whole industry, provided that the employers and trade union parties to the agreement were sufficiently representative of the sector. Due to this REA system, collective bargaining coverage rates were deemed to be high in the construction sector. However, the REAs were struck down by the Supreme Court in May 2013 when it ruled that the sector's REA was unconstitutional during an appeal against a High Court challenge by a group of electrical contractors against the constitutionality of the applicable REA. Collective bargaining coverage rates in Ireland thus dropped dramatically in the construction sector in 2013.

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

- predominance of multi-employer bargaining (Table 10);
- presence of strong sector-related trade unions and employers' or business organisations;
- existence of pervasive extension practices (Table 10).

Although coverage in countries with prevalent multi-employer bargaining and pervasive extension practices tends to be higher than in countries without them, coverage is not necessarily high even in such circumstances. In the case of Bulgaria, for instance, a prevalent multi-employer bargaining system does not prevent an extremely low coverage rate of about 2%.

Sector-related multi-employer bargaining is absent in five countries (Estonia, Latvia, Lithuania, Malta and Poland). In all these countries, collective bargaining coverage within the construction sector tends to be either low or no information is available. All this group of countries joined the European Union in 2004.

However, there is another group of 20 countries with exclusive or prevailing multi-employer arrangements in the construction sector, though not all of them have high or even full collective bargaining coverage rates in the sector. In several countries (such as Belgium, the Czech Republic, Hungary and Slovakia), the multi-level bargaining system combines comprehensive multi-employer bargaining with single-employer agreements. In such cases, the single-employer settlements usually contain more favourable employment terms than the multi-employer agreements.

Due to the relative prevalence of multi-employer settlements in the construction sector, the use of extension practices is significant. Pervasive extension practices in the construction sector are reported for several countries (Table 10). As the aim of extension provisions is to make multi-employer agreements generally binding, the provisions for obligatory membership in the chamber system of Austria should also be noted. Obligatory membership creates an extension effect, since the Austrian Federal Economic Chamber (WKÖ) and its subunits are parties to multi-employer bargaining. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. The country's labour court rulings relate this principle to the multi-employer agreements to the extent that they are regarded as generally binding.

Participation in public policymaking

Interest associations may partake in public policy in one of two ways:

- they may be consulted by the authorities on matters affecting their members;
- they may be represented on 'corporatist' (in other words tripartite) committees and boards of policy concertation.

This study considers only cases of consultation and corporatist participation which explicitly relate to sector-specific matters. Consultation processes are not necessarily institutionalised and therefore the organisations consulted by the authorities may vary according to the issues to be addressed and also over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on occasional rather than a regular basis. Given this variability, Tables 8 and Table 9 flag only those sector-related trade unions and employers' organisations that are usually consulted.

Trade unions

At least some of the sector-related trade unions in the construction sector in all EU27 Member States are usually (that is, on a regular basis or on occasion) consulted by the authorities. In total, about 86% of the sector-related trade unions for which information is available are consulted through participation in existing tripartite structures and/or in the form of unilateral consultation by the authorities. Around 56% of those trade unions for which related information was provided, consultation is carried out on a regular basis (generally at least once a year), while about 44% are only consulted occasionally.

Since there is a multi-union system in 21 out of the 27 Member States with sector-related trade unions, one cannot rule out the possibility that the authorities may favour certain trade unions over others or that the unions compete for participation rights. In at least 11 (Belgium, Bulgaria, Cyprus, Denmark, Ireland, Luxembourg, Latvia, Malta, the Netherlands, Poland and the UK) of the 21 countries with a multi-union system, any of the existing trade unions may take part in the consultation process. In contrast, in five countries (Finland, France, Greece, Spain and Sweden), only some of the sector-related trade unions are usually consulted and at least one other union is not. (For a few countries such as Austria, Germany, Italy and Portugal, no conclusions on possible (un)equal consultation practices can be drawn due to a lack of related information for at least one trade union.) Nevertheless, there is no evidence of inter-union rivalry and/or conflicts over participation in public policy matters in the construction sector in any of the 21 countries with a multi-union system.

Employers' and business organisations

The vast majority (almost 97%) of sector-related employers' and business organisations for which related information is available are involved in consultation procedures. In terms of consultation frequency, almost two-thirds of the organisations for which information is available are consulted on a regular basis, while the rest are consulted on occasion.

No cases of conflict over the participation rights of sector-related employers' organisations are reported from any of the 19 countries with a multi-organisation system. In the multi-organisation systems of Belgium, the Czech Republic, Denmark, France, Hungary, Ireland, the Netherlands, Poland, Sweden and Slovenia, where related data on all employers' and business organisations are available, all of the sector's organisations are consulted. In the pluralist systems seen in Finland, Greece and the UK, at least one of the employers' organisations is usually consulted but at least one other is not.

In all 27 Member States, at least one of the sector-related employers' and business organisations is involved in consultation procedures. For some countries such as Austria, Germany, Italy, Luxembourg, Portugal and Romania which have a pluralist system of employer representation, no information about consultation practices is available for at least some of the organisations. It is therefore not clear whether consultation rights are being attributed to the national organisations for these countries in a selective manner or not.

In all EU27 Member States, consultation rights are attributed equally to the two sides of industry, in that at least one organisation on each side is consulted.

Tripartite participation

Genuine sector-specific tripartite bodies have been established in eight countries (Belgium, Bulgaria, Denmark, Finland, Malta, Poland, Spain and the UK). Table 11 lists a total of 11 bodies – two each in Denmark, Finland and the UK, and one each in the other five.

The legal basis of these tripartite bodies is either a statute or an agreement between the parties involved. The scope of their activities generally focuses on the following topics:

- health and safety problems (such as one body each in Bulgaria, Denmark, Finland and Malta);
- training issues (as is the case of one body each in Belgium, Denmark and Malta, and two bodies in the UK).

Other bodies listed in some national reports are not taken into account in this study because they are bipartite rather than tripartite in terms of composition or sector-unspecific (in other words cross-sectoral) or tripartite bodies for the concertation of economic and social policy. These bodies may also address the sector, depending on the particular circumstances and issues that may arise.

One particularity of the construction sector is the existence of so-called paritarian social funds which are funded and managed by the national sectoral social partners themselves. These paritarian funds frequently fulfil a role complementary to existing governmental structures and mainly deal with issues such as:

- vocational training;
- health and safety;
- sectoral pensions;
- paid holiday schemes.

However, since these paritarian social funds are usually bipartite rather than tripartite bodies, they are not considered in detail in this study.

Table 11: Tripartite sector-specific boards participating in public policymaking

	Name of the body and scope of activity	Origin	Trade unions participating	Business associations participating
BE	Training Fund for the Construction Sector (FVB-FFP Constructiv)	Agreement	CGSLB/ACLVB, FGTB/ABVV, CSC Batiment/ACV Bouw	CC/ CB, Bouwunie
BG	Sectoral Council for Tripartite Cooperation – dealing with health and safety issues, anti-crisis measures and legislation affecting the sector	Statutory	FITUC, FCIW-Podkrepa	BCC
DK	Sectoral Working Environment Council in Building and Construction (BAR Bygge og Anlaeg)	Statutory	3F, Blik & Roer, Danks El-Forbund, Dansk Metal, Fag og Arbejde, FOA, HK, Malerforbundet, Lederne	Asfaltindustriens, Arbejdsgiverforening, Danks Byggeri, Dansk Industri, Danske Malermestre, DS H&I, Glarmesterlauget, Bygningsstyrelsen,

	Name of the body and scope of activity	Origin	Trade unions participating	Business associations participating
				Tekniq
	Main Vocational Training Committee in Building and Construction (Byggeriets Udannelser)	Statutory	3F	Dansk Byggeri
ES	Industrial Observatory of the Construction Sector – conducting research and studies on various issues relevant to the sector	Agreement	MCA-UGT, FECOMA-CCOO	CNC
FI	Working Group on Safety at Work	n.a.	FCTU	CFCI RT
	Working Group on the Prevention of the Black Economy in the Construction Sector	n.a.	FCTU	CFCI RT
MT	Building Industry Consultative Council (BICC) – dealing with health and safety issues, private partnership projects and training issues	Statutory	GWU, UHM	General Retailers & Traders Union, Malta Insurance Association, Federation of Building & Civil Engineering Contractors, Malta Chamber of Commerce, Enterprise and Industry
PL	Tripartite Team for Construction and Public Utilities	n.a.	SbiPD, ZZ Budowlani, FZZPGKiT, NSZZ Solidarnosc	BCC, KbiN, ZPPMdB, UNI-BUD, ZRP, PZPB, PZFD
UK	Construction Industry Training Board (CITB) – dealing with training issues	Statutory	n.a.	n.a.
	Engineering Construction Industry Training Board (ECITB) – dealing with training issues	Statutory	n.a.	n.a.

Note: Information for 2012–2013; n.a. = not available.

Source: EIRO/EurWORK national correspondents (2013–2014)

European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria as defined by Commission Decision on the establishment of Sectoral Dialogue Committees (98/500/EC). Accordingly, a social partner organisation must have the following attributes: It must

> *(a) (...) relate to specific sectors or categories and be organised at European level;*
>
> *(b) (...) consist of organisations that are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States;*
>
> *(c) (...) have adequate structures to ensure their effective participation in the work of the Committees.*

In terms of social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements.

This section analyses the membership domain, membership composition and ability to negotiate of European associations in the construction sector.

The study presents detailed data on one sector-related European association on the employees' side (EFBWW) and two on the employers' side (FIEC and EBC). EFBWW and FIEC are listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU, while EBC has asked to be consulted under the provisions of Article 154 TFEU. The following analysis concentrates on these three organisations, while providing supplementary information on others that are linked to the sector's main national industrial relations actors.

Membership domain

EFBWW is affiliated to the European Trade Union Confederation (ETUC). It organises national workers' organisations from the entire construction industry, the building materials industry, the wood and furniture industry, and the forestry industry. Its membership domain therefore overlaps relative to the sector under consideration.

On the employers' side, FIEC represents European construction enterprises, irrespective of their size and specific business activities. Its membership domain is thus largely congruent relative to the construction sector as defined for the purpose of this study. FIEC is a partner organisation of the European Committee for Standardisation (CEN) and a member/associate member of the European Council for Construction Research, Development and Innovation (ECCREDI), the Enterprise Europe Network run by the European Commission, the European Services Forum (ESF), the European Housing Forum (EHF) and WorldSkills Europe.

EBC represents European construction crafts and SMEs, and thus has a membership domain sectionalist relative to the construction sector. According to its website, it is affiliated to both the European Association of Craft, Small and Medium-sized Enterprises (UEAPME) and Small Business Standards (SBS).

Both FIEC and EBC organise national employers’ organisations rather than individual companies.

Membership composition

The countries covered by EFBWW and FIEC extend beyond the 27 Member States examined in this study. However, the report only considers the membership composition in of these 27 countries.

EFBWW

Table 12 lists the membership of sector-related trade unions drawn from the national reports. At least one direct affiliation is recorded in 24 countries, with only Estonia, Greece and Lithuania not having any affiliation to EFBWW. Multiple memberships occur in 13 countries.

On aggregate, EFBWW counts 50 direct sector-related affiliations from the countries under examination. EFBWW thus covers more than half of the 81 trade unions identified by this study (Table 8) through direct affiliation.

It should be noted that the list of sector-related affiliates to EFBWW as compiled on the basis of the national reports does not include all of the members as listed by EFBWW itself. This is because this study includes only those affiliates whose membership domain is related to the construction sector. Affiliates organising only woodworkers or forestry workers are therefore not taken into account in this report.

All of the direct members of EFBWW are directly involved in collective bargaining related to the construction sector. In so far as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, it may be concluded that EFBWW covers the sector’s most important labour representatives. Exceptional cases of uncovered major trade unions in the sector may involve only PRO-GE and GPA-djp of Austria.

Table 12: EFBWW membership, 2013

Country	Members
AT	GBH*
BE	FGTB-CG/ABVV-AC*, CGSLB/ACLVB*, CSC/ACV Building, Industry & Energy*
BG	FITUC*, FCIW-Podkrepa*
CY	OOIMSEK*
CZ	OS STAVBA*
DE	IG Bau*, IG Metall*
DK	DEF*, Blik & Roer*, 3F*, Malerforbundet*
EE	–
EL	–
ES	MCA-UGT*, FECOMA-CCOO*, ELA-HAINBAT*
FI	FCTU*, Pro*, FEWU*
FR	FO Construction*, FNCB-CFDT*, BATI-MAT-TP CFTC*, FNS Construction*

HU	EFEDOSZSZ*
IE	SIPTU*
IT	FILLEA CGIL*, FILCA CISL*, FENEAL UIL*
LT	–
LU	SB-OGBL*, LCGB-CA*
LV	LCA*
MT	GWU*
NL	FNV Bouw*, CNV Vakmensen*
PL	Budowlani*, SbiPD*
PT	SETTACOP*
RO	FGS Familia*
SE	Elektrikerna*, Byggnads*, GS*, SPU*, SEKO*, Unionen*
SI	SDGD*
SK	IOZ*
UK	GMB*, UCATT*, UNITE*

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

Source: EIRO/EurWORK national centres (2013–2014)

FIEC

FIEC members are listed in Table 13. Of the 27 countries under consideration, FIEC has 25 under its umbrella through direct and indirect associational members from these countries. Latvia and the UK are not covered, although NFB in the UK is not a member but is tied to FIEC through a cooperation agreement.

Multiple memberships of FIEC occur in only five countries (Austria, France, Germany, Italy and Portugal).

On aggregate FIEC has 32 associational members from the EU27, three of which are indirect members affiliated via higher order units. Deducting these three indirect members gives the number that corresponds to the membership list as provided by FIEC.

Associations affiliated to FIEC and unaffiliated associations co-exist in a number of countries (Table 7). Sectoral membership data of the respective organisations of these countries do not provide a clear indication of whether the most important associations are affiliated. In several countries such as Austria, Belgium, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, the Netherlands, Poland, Portugal, Slovenia, Sweden and the UK, some important employers' organisations that conduct bargaining are not affiliated to FIEC.

There are also countries such as Estonia, Italy, Lithuania, Malta and Portugal where an affiliate of FIEC is not engaged in sector-related collective bargaining. Employers' and business organisations which are not involved in collective bargaining may regard themselves as trade associations rather than as industrial relations actors.

Of the 32 affiliates of FIEC, at least 25 are involved in sector-related collective bargaining (for two affiliates, namely FEDIL of Luxembourg and KPB UNI-BUD of Poland, no information on collective bargaining involvement was provided). The proportion of FIEC member organisations that are involved in sector-related collective bargaining is lower than in its counterpart on the labour side, EFBWW, whose national affiliates are all involved in sector-related collective bargaining, The 32 FIEC members cover collective bargaining in at least 20 of the 25 Member States that record affiliations to FIEC. Nevertheless, there are at least 67 sector-related employers' organisations across the EU that are not affiliated to FIEC which are involved in sector-related collective bargaining and thus have to be regarded as relevant national actors within the sector (table 7).

Table 13: FIEC and EBC membership, 2013

Country	FIEC	EBC
AT	BIB*, FVBI*	–
BE	CC/CB*	Bouwunie*
BG	BCC*	–
CY	OSEOK*	–
CZ	SPS v ČR*	SDMSZS
DE	ZDB*, HDB*	–
DK	Dansk Byggeri*	–
EE	EEEL	–
EL	PEDMEDE*	–
ES	CNC*	CNC*
FI	CFCI RT*	–
FR	FFB*, FNTP*, (FFIE*)	CAPEB*, SNSO
HU	EVOSZ*	IPOSZ*
IE	CIF*	–
IT	ANCE*, AGI	ANAEPA*, CNA UNIONE COSTRUZIONI*
LT	LSA	–
LU	FEDIL**	FDA*
LV	–	LBA
MT	FOBC	-–
NL	Bouwend Nederland*	AN*
PL	KPB UNI-BUD**	ZRP*
PT	FEPICOP, (AECOPS*), (AICCOPN*)	–
RO	ARACO*	UNPR**
SE	BI*	–
SI	ZGIGM*	SG-OZS*
SK	ZSPS*	–

Country	FIEC	EBC
UK	[NFB*][a]	FMB*

*Notes: Membership list confined to the sector-related associations of the countries under consideration; affiliation in parenthesis means indirect affiliation via higher-order unit. * Involved in sector-related collective bargaining; ** No information available on collective bargaining involvement; [a] NFB is not a direct member but is tied to FIEC by a cooperation agreement.*

Source: EIRO/EurWork national correspondents (2013–2014)

EBC

EBC members are listed in Table 13. It covers 13 of the 27 Member States under consideration via its 15 direct member associations (according to the list of affiliates provided by EBC in 2012). The other 14 countries are not covered, including Germany – the largest Member State in terms of the number of inhabitants.

Multiple memberships can be found in two countries (France and Italy), which each have two EBC affiliates. Of the numerous sector-related employers' organisations not affiliated to EBC, many can be found which have high sectoral membership data and thus have to be considered as highly important national actors in the sector. The fact that many strong employers' organisations representing member companies which employ a high proportion of sectoral workers are not under the umbrella of EBC is reflected its relatively narrow membership domain, covering only the construction crafts and SMEs rather than the large (multinational) enterprises.

At least 11 of the 15 EBC affiliates are engaged in sector-related collective bargaining, covering bargaining activities in at least 10 of the 27 Member States under consideration (no information on collective bargaining involvement was provided for one affiliated organisation, UNPR of Romania).

Comparison of membership composition of FIEC and EBC

Table 14 uses a number of indicators for measuring representativeness to summarise the main features of FIEC's and EBC's membership structure in relation to the total number of the sector-related national employers' associations.

Table 14: Main features of FIEC and EBC national affiliates, EU27

	FIEC*	EBC*	Total no. of employers' associations**
Number of employers' organisations	32***	15	104
Coverage of countries through affiliations	25	13	27
Domain: covers all business activities in sector	23 (N = 30)	8 (N = 14)	40 (N = 97)
Domain: covers all types of companies in sector	22 (N = 30)	4 (N = 14)	50 (N = 98)
% companies gathered by	28.8 (N = 23)	48.8 (N = 12)	100.0 (N = 79)

	FIEC*	**EBC***	**Total no. of employers' associations****
members****			
% employees employed by companies gathered by members****	56.1 (N = 18)	16.1 (N = 12)	100.0 (N = 65)
Collective bargaining involvement	25 (N = 30)	11 (N = 14)	92 (N = 101)
Consultation	29 (N = 29)	14 (N = 14)	84 (N = 87)

*Notes: * Identified by applying the top-down approach; ** Identified by applying both the top-down and bottom-up approach; *** Includes three indirect members affiliated through higher-level units; the UK's NFB (tied to FIEC by a cooperation agreement) is not considered; **** BIS of Austria is not considered due to unclear data; figures should be treated with caution due to lack of data and the dubiousness of some membership data; N = sample size (that is, total of members or total of employers' associations minus cases for which no data are available).*

Source: EIRO/EurWORK national correspondents (2013–2014); own calculations

FIEC has more than twice as many national members in the construction sector than EBC and covers almost twice as many countries through affiliates from them (Table 14). In terms of absolute numbers, far more employers' organisations which are involved in collective bargaining affecting the sector and consulted by the authorities are affiliated to FIEC than to EBC. However, in relative terms, the percentage (as the share of the respective total number of affiliates) of the members of the respective European social partner organisations which are engaged in collective bargaining and being consulted is almost equal.

The higher organisational strength (in terms of the absolute numbers of members) of FIEC compared with EBC mirrors the fact that FIEC claims to represent construction companies of any kind and size, and thus has an encompassing membership domain with regard to the sector, while EBC's domain is clearly sectionalist with regard to the sector. Correspondingly, the membership domain of the vast majority of the national affiliates of FIEC covers all business activities and all types of companies in the sector. In contrast, the domain of the EBC members tends to be relatively narrow in that, in particular, construction crafts and SMEs are affiliated. In terms of the domain coverage pattern, this means that the domains of employers' organisations affiliated to FIEC are far more often congruent or overlapping with regard to the construction sector than those of organisations affiliated to EBC.

Table 14 also shows the organisational strength of FIEC and EBC measured as the ratio of companies (and employees employed by these companies) gathered by FIEC and EBC members to the total number of companies (and employees employed by them) gathered by all employers' organisations identified in the study. The substantial lack of data means the figures that can be derived from Table 14 are very tentative and should be treated with caution, but they nevertheless reveal a clear tendency. While only 12 EBC members organise and represent almost half of all the companies gathered by 79 sector-related employers' organisations with available data identified for the purpose of this study, 18 FIEC members organise and represent companies which employ more than half of the total employees employed by all companies gathered by 65 employers' organisations with available data. The higher densities of FIEC members in terms of employees compared with those in terms of companies indicate that FIEC tends to organise – through its national affiliates – the larger companies. In contrast, EBC's stronghold can be found among the sector's numerous crafts and SMEs with usually only small workforces.

Capacity to negotiate

The third criterion of representativeness at the European level refers to the organisations' capacity to negotiate on behalf of their own members.

On the side of organised labour, EFBWW appears to have an implicit rather than explicit permanent mandate to negotiate on behalf of its members in matters of the European social dialogue. Article 11 of the EFBWW statutes stipulates that:

> *with respect to the mandates and procedures for European negotiations, the Executive Committee, acting on a proposal of the EFBH-FETBB Management Committee, shall adopt internal regulations by a simple majority.*

Likewise, on the employers' side, the FIEC statutes do not explicitly grant this organisation a general mandate to negotiate on behalf of its members. However, as indicated by the Director General, the FIEC General Assembly unanimously re-confirmed on 8 June 2012 the mandate given to FIEC in 1998 to negotiate on behalf of its members within the framework of the European sectoral social dialogue. The FIEC General Assembly decision of 1998 stipulates that the Steering Committee has to ask the Council for a specific mandate prior to commencing any negotiation.

EBC adopted a General Assembly motion on 29 June 2012 in order to set the framework conditions for giving ad hoc mandates to negotiate social dialogue agreements. This motion stipulates that:

> *the national affiliates are ready and willing to give ad hoc mandates to the EBC to discuss, negotiate and sign all sorts of written agreements engaging politically and legally the national affiliates.*

As a final proof of the weight of these three organisations, it is useful to look at other European organisations which may be important representatives of the sector. This can be done by reviewing the other European organisations to which the sector-related trade unions and employers' associations are affiliated.

The affiliations of the trade unions are listed in Table 8. European organisations other than EFBWW represent a relatively high proportion of both sector-related trade unions and countries. For reasons of brevity, only the European organisations which cover at least three countries are mentioned here. This involves five organisations:

- European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT);
- European Federation of Public Service Unions (EPSU);
- European Transport Workers' Federation (ETF);
- IndustriAll;
- UNI Europa.

Although the affiliations listed in Table 8 are unlikely to be exhaustive, this overview underlines the principal status of EFBWW as the sector's labour representative. The presence of the other organisations in the list is in response to the overlapping domains of many trade unions (Table 5) because these organisations do not claim to attract unions from the construction sector.

A similar review of the membership of the national employers' and business organisations can be derived from Table 7. Most of the organisations have none or few affiliations to European associations other than FIEC and EBC. Overall, three alternative European associations can be identified that cover at least three countries. This involves:

- European Federation of Associations of Insulation Contractors (FESI);
- European International Contractors (EIC);
- European Union of Developers and House Builders (UEPC).

In terms of both the number of affiliations and territorial coverage, all three lag far behind both FIEC and EBC.

Commentary

The main features of the very large construction sector in the EU identified in the research are summarised below.

First, at national level, pronounced pluralism characterises the associational systems of both labour and business. This high associational fragmentation, in particular on the side of organised business, arises from a pronounced differentiation in terms of the labour market along numerous well-demarcated occupations (which affects the associational 'landscape' on the side of organised labour) and business activities (which affects primarily the business side) within the sector. Moreover, the large size of the sector in terms of both the number of companies and employment also tends to foster proliferation tendencies with regard to the associational 'landscape'.

Second, the associations on both sides of industry, albeit more pronounced on the side of organised business, are characterised by often narrow membership domains, which are well tailored to their constituency. In principle, this tends to foster densities since smaller interest organisations can set selective incentives to potential members more easily than larger, general organisations. However, the study reveals that densities do not tend to be high – at least on the part of the national trade unions. This may be explained by a number of employment characteristics in the sector such as:

- high labour turnover, in particular among the lower-skilled ranks;
- high presence of non-standard (fixed-term, part-time) as well as undeclared work;
- high incidence of migrant work.

Third, collective bargaining coverage is highly polarised. Although 12 of the 23 countries with available data record high rates of collective bargaining coverage of 80–100%, five countries record rates well below 10%. High collective bargaining coverage can be found almost exclusively among the 'old' Member States (with the notable exceptions of Hungary and Slovenia), whereas extremely low rates are found among the Baltic countries, Bulgaria and Poland. Comparing the figures on cross-sectoral collective bargaining coverage in the EU27, as presented in EurWORK's industrial relations profiles for each Member State, with the construction sector's bargaining coverage of each Member State does not produce a clear trend regarding the relationship between the two measures. (The data in the national industrial relations profiles have not been subjected to a thorough validation procedure, but this report uses these data because more reliable information on national cross-sectoral collective bargaining coverage rates tends to be out-of-date.) Overall, collective bargaining coverage rates in the construction sector tend to increase with the predominance of multi-employer arrangements and a significant use of extension practices.

The recent recession hit the construction sector severely, with a significant reduction in employment, drops in turnover and output across the Member States and, in at least in some countries, major effects on the national industrial relations systems within the sector. To cope with the challenges facing the sector, its recognised social partners at European level (EFBWW on the employees' side and FIEC on the employers' side) had set up a formal joint sectoral social dialogue committee in 1999. This committee has met regularly and launched various initiatives. FIEC concluded a working arrangement with EBC in 2007 to allow representatives from EBC to participate in the social dialogue meetings within its delegation. Recent outcomes from the committee include joint statements, declarations, positions and recommendations on issues such as intra-corporate transfers, third-country contractors and workers in the EU, bogus self-employment, measures to mitigate against the crisis, posted workers and work-related stress. In addition, EFBWW and FIEC have managed joint projects on various occupational health and safety issues, youth employment, posting of workers and undeclared work.

Finally, with regard to the representativeness status of the three sectoral European-level social partner organisations examined in this study, EFBWW appears to be the main EU-wide representative of the sector's workforce on the employees' side. On the employers' side, FIEC with its encompassing membership domain with regard to the construction sector and its relative organisational strength with regard to the whole sector can be regarded as the main representative of the sector's businesses as a whole. With its limited and clearly demarcated membership domain, which focuses on construction crafts and SMEs (not in relation to the whole construction sector), EBC appears to be a significant industrial relations actor and brings a specific *sectional* supplement of representativeness on the employers' side.

Georg Adam, Vienna, in cooperation with the Università degli Studi di Milano

Annex 1: Individual organisations in the construction sector, EU27

Country	Abbreviation	Full name of association*
AT	BIB	Building Trades Association
	BIBHG	Federal Association of Construction Support Activities
	BIDGS	Federal Association of Roofers, Glaziers, Tinsmiths
	BIEGAK	Federal Association of Electrical, Buildings, Alarm and Communications Technicians
	BIHB	Federal Association Timber Construction
	BIHPFK	Federal Association of Stove-Fitters, Pavers and Tilers and Ceramists
	BIM	Federal Association of Metal Engineers
	BIMT	Federal Association of Painters and Upholsterers
	BIS	Federal Association of Stonemasons
	BISHL	Federal Association of Sanitary, Heating and Ventilation Engineers
	BITHG	Federal Association of Carpenters and Wood-shaping Trades
	FEEI	Federal Association of the Electrical and Electronics Industry
	FVBI	Construction Industry Association
	GBH	Union of Construction and Wood Workers
	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	PRO-GE	Manufacturing Union
	WKÖ	Austrian Federal Economic Chamber
BE	Bouwunie	Construction Federation
	CC/CB	Construction Confederation
	CGSLB/ACLVB	Federation of Liberal Trade Unions of Belgium
	CSC/ACV	Confederation of Christian Trade Unions
	CSC/ACV Building, Industry & Energy	Confederation of Christian Trade Unions – Building, Industry & Energy
	FEB	Federation of Belgian Enterprises
	FGTB/ABVV	Belgian General Federation of Labour
	FGTB-CG/ABVV-AC	Socialist Trade Union – General Federation
	UNIZO	UNIZO

Country	Abbreviation	Full name of association*
BG	BCC	Bulgarian Construction Chamber
	BIA	Bulgarian Industrial Association
	CITUB	Confederation of Independent Trade Unions of Bulgaria
	FCIW-Podkrepa	Federation Construction, Industry and Water Supply – Podkrepa
	FITUC	Federation of Independent Trade Unions in Construction
	Podkrepa	Confederation of Labour Podkrepa
	CWU	Construction Workers Union
CY	DEOK	Democratic Labour Federation of Cyprus
	DWUBC	Democratic Workers' Union of Builders and Carpenters
	OEB	Employers and Industrialists' Federation of Cyprus
	OOIMSEK	Federation of Builders and Minders and Relevant Professions
	OSEOK	Federation of Building Contractors Associations of Cyprus
	PEO	Pancyprian Federation of Labour
	SEK	Cyprus Workers' Federation
	ČMKOS	Czech-Moravian Confederation of Trade Unions
CZ	HK ČR	Czech Chamber of Commerce
	KZPS ČR	Confederation of the Employers' and Entrepreneurs' Associations of the Czech Republic
	OS STAVBA	Trade Union of Building Workers of the Czech Republic
	SDMSZS	Association of Small- and Medium-size Employers in the Construction Industry of the Czech Republic
	SPS v ČR	Association of Building Entrepreneurs of the Czech Republic
	UZS ČR	Union of Employers' Associations of the Czech Republic
	BDA	German Confederation of Employers' Associations
DE	BDI	Federation of German Industries
	BI Gerüstbau	Federal Guild of the Scaffolding Trade
	BV Farbe	Federal Association for the Painting Trade and the Preservation of Monuments and Structures
	BV Gerüstbau	Federal Association of the Scaffolding Trade
	BV Steinmetze	Federal Association of German Stonemasons
	CGB	Christian Federation of Trade Unions
	CGM	Christian Metalworkers' Union
	DA	German Association of the Demolition Industry
	DGB	German Trade Union Federation

Country	Abbreviation	Full name of association*
	HDB	Federation of the German Construction Industry
	IG Bau	Trade Union for Building, Forestry, Agriculture and the Environment
	IG Metall	Metalworkers' Union
	UDH	German Association of the Skilled Crafts Confederations
	ZDB	German Construction Federation
	ZVDH	Federal Association of the Roofing Trade
	ZVSHK	German Sanitary, Heating and Air Conditioning Association
	3F	United Federation of Danish Workers
DK	Blik & Roer	Danish Plumbers' Union
	DA	Confederation of Danish Employers
	Dansk Byggeri	Danish Construction Association
	Dansk Metal	Danish Metalworkers' Union
	Danske Malermestre	Danish Master Painters
	DEF	Danish Union of Electricians
	DHV	Danish Trade
	DS H&I	DS Trade & Industry
	HK Privat	Union of Commercial and Clerical Employees in Denmark
	HVR	Federation of Small- and Medium-sized Enterprises
	LO	Danish Confederation of Trade Unions
	Malerforbundet	Danish Painters' Union
	Tekniq	Danish Mechanical and Electrical Contractors' Association
	EAKL	Estonian Trade Union Confederation
EE	EEAÜL	Association of Estonian Energy Workers' Trade Unions
	EEEL	Estonian Association of Construction Entrepreneurs
	EKT	Estonian Chamber of Commerce and Industry
	ETTA	Estonian Transport and Road Workers' Trade Union
	ETTK	Estonian Employers' Confederation
	GFBRP	Greek Federation of Builders and Related Professions
EL	GSEE	Greek General Confederation of Labour
	HFOMD	Hellenic Federation of Operators of Machines and Drillers
	PEDMEDE	Pan-Hellenic Association of Engineers Contractors of Public Works
	SATE	Association of Greek Contracting Companies and Limited Liability Companies

Country	Abbreviation	Full name of association*
	STEAT	Association of Technical Companies of Higher Classes
	CCOO	Trade Union Confederation of Workers' Commissions
ES	CEOE	Spanish Confederation of Employers' Organisations
	CEPYME	Spanish Confederation of Small- and Medium-sized Enterprises
	CIG	Galician Inter-union Confederation
	CNC	National Confederation of Construction
	ELA-HAINBAT	Solidarity Confederation of Basque Workers', Hainbat Federation
	FCM-CIG	Federation of Construction and Wood of the Galician Inter-union Confederation
	FECOMA-CCOO	Federation of Construction, Wood and Related Activities of the Trade Union Confederation of Workers' Commissions
	MCA-UGT	Federation of Metal, Construction and Related Activities of the General Workers' Confederation
	UGT-ES	General Workers' Confederation
	AKAVA	Confederation of Unions for Professional and Managerial Staff
FI	CFCI RT	Confederation of Finish Construction Industries – Rakennusteollisuus
	EK	Confederation of Finnish Industries
	FCTU	Finnish Construction Trade Union
	FEWU	Finish Electrical Workers' Union
	JHL	Trade Union for the Public and Welfare Sectors
	PALTA	Service Sector Employers PALTA
	Pardia	Federation of Salaried Employees Pardia
	Pro	Trade Union Pro
	SAK	Confederation of Finnish Trade Unions
	STTA	Electrical Employers Association
	STTK	Finnish Confederation of Professionals
	YTN	Federation of Professional and Managerial Staff
	BATI-MAT-TP-CFTC	BATI-MAT-TP CFTC Federation
FR	CAPEB	Confederation of Craft and Small Firms in Construction
	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Management – General Confederation of Professional and Managerial Staff
	CFE-CGC BTP	National Union of Managers and Technicians of the Building Construction, Civil Engineering and Related

Country	Abbreviation	Full name of association*
		Activities Sectors
	CFTC	French Christian Workers' Confederation
	CG SCOP	General Confederation of SCOP
	CGPME	Confederation of Small- and Medium-sized Enterprises
	CGT	General Confederation of Labour
	FFB	French Building Federation
	FFIE	French Electrical Contractors Association
	FNCB-CFDT	National Federation of Construction and Wood – French Democratic Confederation of Labour
	FNS Construction	National Federation of Employees of Construction, Wood and Furniture
	FNTB	National Federation of Civil Engineering
	FO	Force Ouvrière
	FO Construction	FO Construction
	FSCOP	Construction's Cooperative Federation
	MEDEF	Movement of the Enterprises of France
	SNSO	National Association of Enterprises of Sub-trade
	UPA	Union Professionnelle Artisanale
HU	EVOSZ	National Federation of Hungarian Contractors
	IPOSZ	National Association of Craftsmen Boards
	MSZOSZ	National Association of Hungarian Trade Unions
	AECI	Association of Electrical Contractors of Ireland
IE	BATU	Building and Allied Trades' Union
	CIF	Construction Industry Federation
	ECA	Electrical Contractors' Association
	IBEC	Irish Business and Employers' Confederation
	ICTU	Irish Congress of Trade Unions
	OPATSI	Operative Plasterers and Allied Trades Society of Ireland
	SIPTU	Services, Industrial, Professional and Technical Union
	TEEU	Technical Engineering and Electrical Union
	UCATT	Union of Construction, Allied Trades and Technicians
	AGCI	General Association of Italian Cooperatives
IT	AGCI SPL	General Association of Italian Cooperatives – Production and Work Sector
	AGI	Association of General Enterprises
	ANAEPA	National Association of Construction Artisans, Painters and

Country	Abbreviation	Full name of association*
		Decorators and Related Activities
	ANCE	National Association of Private Construction
	ANIEM	National Association of Construction Enterprises
	ANCPL	National Association of Production and Work Cooperatives
	Casartigiani	Autonomous Confederation of Artisan Unions
	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	CLAAI	Confederation of Free Associations Italian Artisans
	CNA	National Confederation for the Craft Sector and SMEs
	CNA UNIONE COSTRUZIONI	National Confederation Artisans Union Construction
	Confartigianato Imprese	General Confederation of Artisans
	Confcooperative	Confederation of Italian Cooperatives
	CONFIMI IMPRESA	Confederation of Manufacturing Industries and Private Enterprises
	Confindustria	General Confederation of Italian Industry
	CONFSAL	General Trade Union Confederation of Autonomous Unions
	FEDERLAVORO E SERVIZI	Federation of Production and Work Cooperatives
	FENEAL	National Federation of Construction and Wood Workers
	FESICA	Federation of Industrial, Commercial and Artisan Trade Unions
	FIAE	Italian Federation of Construction Artisans
	FILCA	Italian Federation of Construction Workers
	FILLEA	Italian Federation of Wood and Construction
	LEGACOOP	National League of Cooperatives
	UGL	General Union of Work
	UGL Costruzioni	General Union of Work – National Federation Construction
	UIL	Italian Union of Workers
	LPK	Lithuanian Confederation of Industrialists
LT	LPSK	Lithuanian Trade Union Confederation
	LSA	Lithuanian Builders' Association
	LSPS	Lithuanian Building Workers Trade Union
	FDA	Federation of Craftsmen
LU	FEDIL	Business Federation Luxembourg

Country	Abbreviation	Full name of association*
	LCGB	Luxembourg Confederation of Christian Unions
	LCGB-CA	Luxembourg Confederation of Christian Unions – Construction and Crafts
	OGBL	Independent Luxembourg Union Federation
	SB-OGBL	Trade Union of Construction, Crafts and Mechanic Construction of the Independent Luxembourg Union Federation
	LBA	Latvian Construction Contractors' Association
LV	LBAS	Free Trade Union Federation of Latvia
	LCA	Latvian Builders Trade Union
	LCDAA	Latvian Road Workers Trade Union
	LDDK	Latvian Employers' Confederation
	LTRK	Latvian Chamber of Commerce and Industry
	CMTU	Confederation of Malta Trade Unions
MT	FOBC	Federation of Building and Civil Engineering Contractors
	GWU	General Workers' Union
	UHM	Malta Workers' Union
	AN	Builders' Federation of the Netherlands
NL	Bouwend Nederland	Construction – Netherlands
	CNV	Christian Federation of Trade Unions
	CNV Vakmensen	Christian Federation of Trade Unions – Craftsmen
	FNV	Federation of Dutch Trade Unions
	FNV Bouw	Federation of Dutch Trade Unions – Construction
	MKB-Nederland	Dutch Federation of SMEs
	VNO-NCW	Confederation of Netherlands Industries and Employers
	Budowlani	Budowlani
PL	KPB Uni-BUD	Korporacja Przedsiebiorcow Budowlanych
	NSZZ Solidarnosc	Independent and Self-Governing Trade Union Solidarity
	OPZZ	All-Poland Alliance of Trade Unions
	SBiPD	National Secretariat of the Construction and Lumber Industry of NSZZ Solidarnosc
	ZRP	Polish Crafts Association
	AECOPS	Association of Companies in Construction, Public Works and Services
PT	AEP	Entrepreneurial Association of Portugal
	AICCOPN	Association of Construction and Public Works Industries

Country	Abbreviation	Full name of association*
	AICE	Association of Construction Industries
	CGTP-IN	General Confederation of Portuguese Workers – Intersindical Nacional
	FEPICOP	Portuguese Federation of Construction and Public Works Industry
	FEVICCOM	Portuguese Federation of Construction, Ceramics and Glass Unions
	SETACCOP	Union of Construction, Public Works and Services
	SQTD	Union of Structural Draftsmen
	UGT-PT	General Union of Workers
	ACPR	Alliance of Employer Confederations of Romania
RO	ARACO	Romanian Association of Building Entrepreneurs
	CNS Cartel Alfa	National Trade Union Confederation Cartel Alfa
	FGS Familia	General Trade Unions Federation Familia – Anghel Saligny
	UNPR	Romanian Employer Association, Construction Branch
	Almega T	Almega Service Union
SE	BI	Swedish Construction Federation
	Byggnads	Swedish Building Workers’ Union
	EIO	Electrical Installers’ Organisation
	Elektrikerna	The Electricians
	Företagarna	Swedish Federation of Business Owners
	GBF	Glass Industry Employers’ Association
	GS	Swedish Union for Forestry, Wood and Graphical Workers
	Ledarna	Sweden’s Organisation for Managers
	LO	Swedish Trade Union Confederation
	Malaremästarna	Employers’ Association for Swedish Painting Contractors
	PE	Painting Enterprises
	PLR	Employers’ Association of Swedish Plate Works
	SACO	Swedish Confederation of Professional Associations
	SAGE	Swedish Association of Graduate Engineers
	SEKO	Union of Service and Communication Employees
	SPU	Swedish Painters’ Union
	ST	Union of Civil Servants
	Svenskt Näringsliv	Confederation of Swedish Enterprises
	TCO	Swedish Confederation of Professional Employees
	TJ	Association for Traffic and Railway

Country	Abbreviation	Full name of association*
	TMF	Employers' Association of the Woodprocessing and Furniture Industry
	VVS Företagen	Swedish Association of Plumbing and HVAC Contractors
	Unionen	Trade Union for Professionals in the Private Sector
	GZS	Chamber of Commerce and Industry of Slovenia
SI	GZS-ZGIGM	Chamber of Construction and Building Materials Industry of Slovenia within the Chamber of Commerce and Industry of Slovenia
	OZS	Chamber of Craft of Slovenia
	SDGD	Trade Union of Workers of the Construction Sector of Slovenia
	SG-OZS	Chamber of Craft of Slovenia – Construction Workers' Section
	ZDS	Association of Employers of Slovenia
	ZGIGM	Chamber of Construction and Building Materials Industry of Slovenia
	ZSSS	Association of Free Trade Unions of Slovenia
	IOZ	Integrated Trade Union Association
SK	KOZ SR	Confederation of Trade Unions
	RUZ SR	National Union of Employers
	ZSPS	Association of Construction Entrepreneurs of Slovakia
	CBI	Confederation of British Industry
UK	CECA	Civil Engineering Contractors' Association
	CSEU	Confederation of Engineering and Ship Building Unions
	ECA	Electrical Contracting Association
	ECIA	Engineering Construction Industry Association
	FMB	Federation of Master Builders
	GMB	General, Municipal, Boilermakers and Allied Trade Union
	HBF	Home Builders Federation
	LGA	Local Government Association
	NASC	National Access & Scaffolding Confederation
	NFB	National Federation of Builders
	NFRC	National Federation of Roofing Contractors
	PDA	Painting & Decorating Association
	SBF	Scottish Building Federation
	SELECT	Select Trade Union
	TICA	Thermal Insulation Contractors Association

Country	Abbreviation	Full name of association*
	TUC	Trades Union Congress
	UCATT	Union of Construction, Allied Trades and Technicians
	UKCG	UK Contractors Group
	UNITE	Unite Trade Union
Europe	AIE	European Association of Electrical Contractors
	CEC	European Managers
	CECOP	European Confederation of Workers' Co-operatives, Social Cooperatives and Social & Participative Enterprises
	CEEP	European Centre of Employers and Enterprises Providing Public Services
	CEI-Bois	European Confederation of Woodworking Industries
	CENELEC	European Committee for Electrotechnical Standardisation
	CESI	European Confederation of Independent Trade Unions
	EACD	European Association of Building Crafts and Design
	EBC	European Builders Confederation
	EBTS	European Breakdown Tyre and Technical Services
	EDA	European Demolition Association
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EFFC	European Federation of Foundation Contractors
	EFIC	European Furniture Industries Confederation
	EFJ	European Federation of Journalists
	EFTC	European Federation of Timber Construction
	EIC	European International Contractors
	EiiF	European Industrial Insulation Foundation
	EPSU	European Federation of Public Service Unions
	ERMCO	European Ready Mixed Concrete Organisation
	ETF	European Transport Workers' Federation
	EUF	Federation of European Tile-fixers' associations
	EUFA P+F	Association for the Promotion of Professional Training for Parquet Laying and other Floor Covering Techniques in Europe
	Eurocadres	Council of European Professional and Managerial Staff
	Eurociett	European Confederation of Private Employment Agencies
	Eurofedop	European Federation of Public Service Employees

Country	Abbreviation	Full name of association*
	EUROFM	European Facility Management Network
	EURO WEA	European Workers' Education Associations
	EuroWindoor	EuroWindoor – umbrella of fenestration and door sector associations
	FAECF	Federation of the European Window and Curtain Walling Manufacturers' Associations
	FEANI	European Federation of National Engineering Associations
	FECC	European Association of Chemical Distributors
	FEMIB	Federation of the European Building Joinery Associations
	FERPA	European Confederation of Retired and Older Persons
	FESI	European Federation of Associations of Insulation Contractors
	FIEC	European Construction Industry Federation
	GCI-UICP	European Technical Contractors Committee for the Construction Industry
	IFD	International Federation of the Roofing Trade
	IndustriAll Europe	IndustriAll European Trade Union
	SCECBU	Standing Committee of European Central Bank Unions
	UEAPME	European Association of Craft, Small- and Medium-sized Enterprises
	UEEP	European Confederation of National Plastering Drywall Installation Associations
	UEG	Association of Scaffolding Enterprises in Europe
	UEPC	European Union of Developers and House Builders
	UEMV	European Glass and Glazing Association
	UNI Europa	Union Network International – Europe
	UNIEP	International Association of Painting Contractors
	VEUKO	European Confederation of Associations of Tiled Stove Manufacturing and Stove Setting Craft

Annex 2: Country groups and codes

Country groups

EU15 15 EU Member States prior to enlargement in 2004

EU27 Current 28 EU Member States except for Croatia

Country codes

The order of the countries follows the EU protocol based on the alphabetical order of the geographical names of countries in the original language.

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

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