



# Representativeness of the social partner organisations: Textile and clothing sector

## Key findings

### Introduction

#### Purpose, objectives, and methodology

This short report examines the process of assessing the representativeness of the actors involved in the European sectoral social dialogue committee for the textile and clothing sector. It summarises the findings from a comprehensive study on representativeness in the textile and clothing sector.<sup>1</sup> Based on this assessment, the European Commission decides which organisations should be kept on or added to the list of organisations entitled to consultation under Article 154 of the Treaty on the Functioning of the European Union (TFEU). In the case of European social partner agreements, required to be implemented by means of a Council directive as set out in Article 155 TFEU, the legislative powers granted to European social partners are based on their representativeness.

The European sectoral social dialogue committee for the textile and clothing sector, which was established first as an informal forum for European social dialogue in 1992 and then as a sectoral social dialogue committee in its current form in 1999, forms the context for this study. While participation in this committee is based on the autonomy of the European associations, this assessment of the representativeness of the various organisations can provide some guidance for future decision-making on this. Furthermore, for the national actors included in the study that are not yet represented in the committee, the findings may offer valuable guidance for future capacity-building initiatives.

The representativeness of an organisation is assessed on three criteria, as specified in European Commission Decision 98/500/EC of 1998.<sup>2</sup> First, the sector-relatedness – the coverage of the sector by the national member organisations of the European associations – is assessed. Second, the degree to which these national member organisations have the capacity to negotiate on working conditions in the sector is considered, together with the number of Member States in which the European associations have affiliates that are considered representative and that are involved in collective bargaining. Third, effective participation in the European sectoral social dialogue committee is measured through the capacity of the European associations to negotiate and fully represent their national member organisations, including their attendance at the committee meetings.

This study is based on information gathered in the 27 EU Member States by the Network of Eurofound Correspondents, using a detailed questionnaire that was issued in 2020. Following careful analysis of the data collected, a report was drafted, identifying **IndustriAll Europe** – representing employees – and **Euratex** – representing employers – as the representative European-level social partner organisations in the textile and clothing sector. A first informal (pre-evaluation) consultation of IndustriAll Europe and Euratex took place in May 2022. The final draft of the report was formally evaluated (between 16 June and 11 July 2022) by Eurofound's Advisory Committee on Industrial Relations, and by all the European-level sectoral social partners mentioned in this report. This tripartite approach, including several opportunities to provide feedback and comments, is intended to ensure the accuracy of the study and the acceptance of the findings by all actors involved in the sector.

<sup>1</sup> See [Representativeness of the European social partner organisations: Textile and clothing sector](#).

<sup>2</sup> Commission Decision (98/500/EC) of 20 May 1998 on the establishment of Sectoral Dialogue Committees promoting the dialogue between the social partners at European level.

## Economic background and employment trends

Although huge transformations have occurred in the European textile and clothing sector over the past decade as a result of technological innovation, the elimination of import quotas, and globalisation, the sector remains a major player in clothing exports throughout the world. It has increased its competitiveness, primarily by reducing mass production and focusing on higher added-value products (Euratex, 2019).

This recovery in the sector was evident in economic and employment trends. Eurostat data show that declining employment in the textile and clothing sector halted in 2015. In terms of Nomenclature of Economic Activities (NACE) codes, there are two main subsectors: **manufacture of textiles** (NACE 13) and **manufacture of wearing apparel** (NACE 14). Job losses between 2011 and 2015 were particularly high in the manufacture of wearing apparel subsector (clothing), while in the manufacture of textiles the decline was less severe. Similarly, the recovery in employment between 2015 and 2018 was more pronounced in textiles than in clothing. In 2018, overall employment in clothing was just 88% of the 2011 figure, while in textiles it had reached 97%. This positive trend in employment was interrupted by the COVID-19 crisis; however, the gradual lifting of lockdowns in most EU countries from the second quarter of 2020 slowed the decline. By the fourth quarter of 2020, overall employment in the sector was similar to and even slightly higher than in the fourth quarter of 2019.

In 2018, according to Eurostat, almost 1.5 million people (1,461,322) were employed in the textile and clothing sector in the EU. The distribution across Member States is highly uneven. A group of three countries account for most of the EU sectoral workforce: Italy (22.5%), Romania (11.0%) and Poland (10.9%). In five Member States (Portugal, Germany, Spain, Bulgaria and France), the sectoral workforce is between 5% and 10% of the EU total for the sector, while in the majority of countries (19) it is below 5%.

Of the entire EU workforce, 0.8% is employed in the textile and clothing sector. The proportion of the national workforce employed in the sector is highest in Bulgaria (3.2%), Portugal (3.0%), Lithuania (2.1%) and Romania (1.9%). There are three countries in which between 1.3% and 1.5% of the national workforce is employed in the textile and clothing sector: Italy, Latvia and Estonia. In all the other EU Member States, around 1%, or less than 1%, of the national workforce is employed in the sector.

Employment in manufacture of wearing apparel (NACE 14) is predominant (59%), but its share in overall employment in the sector is declining; in 2011, it was 64%. The distribution of employment between manufacture of textiles and manufacture of clothing varies across countries. Employment in the manufacture of textiles is lower in eastern European and some southern European Member States and higher in western European and Nordic Member States. Its lowest employment levels

(not exceeding 20%) are in the newest Member States, such as Romania, Bulgaria and Croatia, and its highest in Sweden, the Netherlands and Belgium (over 75%). This divide can be explained by labour specialisation and lower labour costs in eastern and southern European Member States, which tend to specialise in clothing manufacture, while western and Nordic countries specialise in textile manufacturing – often high added-value technical and industrial textiles. This is the case, for example, in Belgium and Sweden, where the smart textile and technical textile industry is large and innovative, and therefore one of the fastest growing segments of the economy (TEKO and Marknads Akademien, 2015; Flanders Investment and Trade, undated).

The gender distribution of employment in the two parts of the sector is very different. While the proportions of men and women employed in the manufacture of textiles are relatively balanced, with a slightly higher share of employment among women, almost five times more women than men are employed in the clothing industry. This suggests that lower added-value economic activities, concentrated mostly in the latter industry – and in eastern European Member States – tend to make extensive use of a female workforce. In contrast, in the manufacture of textiles, which is often characterised by higher added-value products and innovation, male and female employment is more balanced.

As with sectoral employment, the decline in the number of companies stopped after 2015, reaching 184,307 companies in 2018, slightly higher than in 2011 (177,000), according to Eurostat. Almost two-thirds of companies in the EU27 are concentrated in manufacture of clothing (67%) and one-third (33%) in the manufacture of textiles. The top five countries in terms of number of companies are Italy, Poland, Czechia, Spain and France. Together, these five countries account for 60% of all companies at EU level, with Italy alone accounting for 24%. All these countries, apart from Czechia, are among the top producers of textile products in the EU. In 2016, Spain was the second largest extra-EU exporter, Italy produced 45% of all clothes made in the EU, and France ranked third in the EU for total textile and clothing turnover (Euractiv, 2016).

The sector is characterised by the prevalence of small companies employing fewer than 10 people: almost 87% of companies in the EU27 employ between 0 and 9 people. In total, microenterprises employ 21% of the sector's workforce. In contrast, large companies (over 250 employees) account for less than 1% of all companies, but they employ 21% of the sectoral workforce. The highest share of large companies is found in Romania (2.2%), Germany and Croatia (both 1%).

While the number of employees in the sector has declined year on year, productivity levels have increased. Overall, data on employment and economic trends indicate a stable recovery since 2015. The main cause of the decline registered until 2015 seems to have been globalisation – the liberalisation of international trade, global trade competition and shifting competitive advantages – with

low-cost non-EU countries taking over markets formerly served by EU-based companies (Eurofound, 2016). The shift from mass production towards high added-value products and continuous innovation and research seem to be an adequate response to these challenges, leading to relative stability and a recovery in the competitiveness of the textile and clothing sector.

## National-level industrial relations

### National textile and clothing sector trade unions

There are 66 sector-related trade unions in the 27 EU Member States. The number of trade unions in each country varies significantly: nine Member States have only one sectoral trade union, while eighteen have more than two, with only two countries (Spain and France) exceeding five trade unions.

#### Membership domain of trade unions

Most of the trade unions (73%) have members in both manufacture of textiles (NACE 13) and manufacture of wearing apparel (NACE 14). Both parts of the sector are organised by trade unions in all Member States, except Cyprus (where only clothing is covered). At EU27 level, the trade union membership coverage is higher in clothing than in textiles, which may be explained by higher employment levels in the latter.

The number of NACE subcodes covered by the trade unions (their membership domain width) is wide, covering most parts of the sector. At EU27 level, the average membership domain width is 66%, implying that more than half of NACE activities in the sector are covered by union membership. Almost half of the unions in the sector (47%) cover all NACE activities, thus having a 100% membership domain width. Some 18% of the unions represent workers in more than half (although not all) of sectoral activities, and 29% have members in less than 50% of sectoral activities.

In the textile manufacturing sector (NACE 13), the highest trade union coverage (the number of unions with members in each NACE subcode) is found in the subsector 'manufacture of other textiles' (13.9). A possible explanation is that at EU27 level the number of enterprises and employment are highest in this subsector. Over 50% of companies and over 50% of employment in textile manufacturing are concentrated in NACE 13.9, according to Eurostat. In the manufacture of wearing apparel sector (NACE 14), the highest trade union coverage is encountered in the subsector 'other outerwear' (general clothing) (14.13).

Over two-thirds of the trade unions in the textile and clothing sector cover all types of workers. Only around one-quarter of the sector-related unions cover one type of workers only (only blue-collar or only white-collar workers). In some Member States, such as Austria, Belgium, Finland, Greece and Sweden, there are different trade unions organising different types of workers. This kind of

fragmentation is mostly due to different trade unions representing only blue-collar or only white-collar workers.

Most of the trade unions in the sector cover the entire country. Only a few trade unions are organised at local or regional level. In some cases, the local or regional unions are in federal states, such as Belgium or Spain, but locally organised unions exist also in centralised states, such as France, Hungary and Romania. Usually, these are small organisations, often organising only part of the sector and with a membership not exceeding 0.2%.

The vast majority of the trade unions in the sector (92%) also have members in other sectors. About two-thirds (67%) of the unions also represent other sectors as well as the manufacture of textiles (NACE 13) and manufacture of wearing apparel (NACE 14), a type of membership domain termed 'overlapping'. Some 21% of the unions cover other sectors but only part of the textile and clothing sector – this is termed 'sectional overlap'. Around 3% of the unions cover both parts of the sector (textiles and clothing) – described as 'convergence' – and 2% cover only one part of the sector (termed 'sectionalism'). For 6% of the unions, no data are available.

The other sectors in which the textile and clothing trade unions commonly also have members are commerce, tanning and leather, and footwear. The footwear sector appears to be the sector in which most sectoral trade unions have members in most Member States: 39 out of 66 sectoral trade unions (59%) in 20 Member States also have members in the footwear sector; 34 trade unions in 16 Member States have members in the tanning and leather sector; and 27 trade unions in 14 Member States have members in the commerce sector.

#### Trade union density

Membership strength in terms of the proportion of the sectoral workforce represented by trade unions varies significantly. Although incomplete, data obtained by national correspondents indicate an average sectoral union density of 12% for the EU27. The analysis of workforce density among the sectoral trade unions shows that, of 52 sector-related trade unions for which data regarding membership are available, only 3 have a sectoral membership rate of over 50%: ACV-CSC Metea (Belgium), the Finnish Industrial Union and the GWU (Malta). Around one-quarter of trade unions have a density rate of between 10% and 49%, around one-third have a rate of between 1% and 9%, and one-quarter have a rate below 1%. Most of the trade unions with a density rate over 10% are in western European Member States, characterised by either a large sectoral workforce or generally high union density (Austria, Denmark, Finland, Germany, Italy, Portugal, Spain, Sweden). They are encountered less often in central and eastern European Member States, but they do occur in Croatia, Hungary and Slovenia. The data indicate no clear correlation between trade union density and other characteristics of the unions, such as sectoral and territorial coverage, width of the domain membership or types of workers covered.



The data also show that union density is characterised by significant variation across Member States. In 12 Member States (44%), the trade union density in the sector is below the EU27 average and in 14 Member States (52%) it is above the average (data for Luxembourg are missing). Member States with union density above the EU27 average in the textile and clothing sector are countries generally known for their high union density, such as Belgium, Malta and the Nordic countries (Denmark, Finland, Sweden). This group also includes countries with average union density in the textile and clothing sector but where traditionally trade unions have played an important role and social dialogue is a key element of the industrial relations system, such as Austria and Italy. Furthermore, higher than average union density rates in the sector are found in a few Member States with rather low national union density, such as Hungary.

### Collective bargaining

Of the 66 sectoral trade unions, 58 (88%) are involved in collective bargaining in the sector. On average, collective bargaining covers 55% of the sectoral workforce. Over one-third of unions (35%) are involved in both multi-employer (sectoral-level) and single-employer (company-level) collective bargaining. Some 30% of the unions are involved exclusively in single-employer collective bargaining and 21% are involved exclusively in multi-employer collective bargaining. Multi-employer collective bargaining is prevalent in western European Member States, while company-level collective bargaining prevails in central and eastern European Member States.

Collective bargaining coverage in the textile and clothing sector is relatively high. In total, more than half of the trade unions in the sector cover in collective bargaining all NACE 13 subcodes and almost half of them cover all NACE 14 subcodes. High collective bargaining sectoral coverage is encountered predominantly among unions involved in multi-employer collective bargaining; the average number of NACE subcodes covered by the unions involved in multi-employer collective bargaining is 8.3 (out of 11 in total). In contrast, the average number of NACE subcodes covered by the unions involved in company collective bargaining only is 3.2.

### Social dialogue

Most of the unions in the sector are involved in social dialogue: bipartite or tripartite social dialogue or consultation by the government on sector-related matters. According to the data, more than half of sectoral trade unions (39 out of 66) are involved in bipartite or tripartite social dialogue. In addition, over half of trade unions (35) are consulted by the government on sector-related matters. Sectoral unions are involved in bipartite or tripartite social dialogue and governmental consultation in almost all Member States. Only in Cyprus, Estonia, Greece, Ireland, Luxembourg and Malta are the unions not involved in bipartite or tripartite social dialogue; only in Cyprus, Czechia, Greece, Ireland, Luxembourg and Malta is no union consulted by the government on sector-related matters.

Apart from five trade unions (OEKIDE and PSPKM in Greece, LCGB in Luxembourg, and CIG Industria and ELA in Spain), all the unions are involved in collective bargaining, in bipartite or tripartite social dialogue, or in consultation by the government on sector-related matters. Greece is the only Member State in which no trade union is involved in collective bargaining or in bipartite or tripartite social dialogue or consulted by the government on sector-related matters.

## National textile and clothing sector employer organisations

This study identified 52 employer organisations in 24 Member States in the textile and clothing sector. In three Member States, there are no sector-related employer organisations: Cyprus, Luxembourg and Slovakia. In Cyprus and Luxembourg, the sector is very small, while in Slovakia employment in the sector accounts for 1.6% of national employment. However, since 2010, no employer organisation has operated in the sector in Slovakia. Ten Member States have only one employer organisation and fourteen Member States have more than two employer organisations. Of the last group, only two (Italy and Portugal) have five or more employer organisations.

### Membership domain of employer organisations

The sectoral coverage of employer organisations at EU27 level is high. The average membership domain width is 77%, meaning that more than three-quarters of NACE activities in the sector are covered by sectoral employer organisations. Some 42% of the employer organisations cover all NACE activities, thus reaching a 100% membership domain width. Another 25% of the employer organisations cover between 50% and 99% of the NACE subcodes and 21% less than 50%.

In manufacture of textiles (NACE 13), the highest sectoral coverage by employer organisations is encountered in the subsectors 'weaving of textiles' (13.2) and 'manufacture of other textiles' (13.9): 36 out of a total of 52 employer organisations have affiliated members in each of these activities. In manufacture of wearing apparel (NACE 14), the highest employer organisation coverage is in 'manufacture of other outerware' (14.13): 40 employer organisations have affiliated members in this activity.

Most of the sectoral employer organisations (81%) cover companies of all sizes. Only a small share (one-tenth) of employer organisations covers only one type of companies (predominantly small companies).

The geographical coverage of employer organisations is very high; the majority of the sectoral organisations cover the entire country. Only one employer organisation – in France – is organised at local level.

More than half of the employer organisations (55%) have members in other sectors, a lower percentage than the equivalent figure for the trade unions, among which multisectoralism is more widespread. The data indicate that half of the employer organisations in the sector (52%) cover both parts of the sector (textiles and clothing) plus

other sectors (overlap); 6% of the employer organisations cover only part of the sector (textiles or clothing) and also cover other sectors (sectional overlap); 15% of employer organisations cover both parts of the sector and no other sectors (congruence); and 15% cover only one part of the sector (sectionalism).

The other sectors most commonly covered are commerce, tanning and leather, and footwear. The footwear sector appears to be the one in which most sectoral employer organisations have members in most Member States: 10 textile and clothing sector employer organisations (19%) also have members in the footwear sector, in 6 Member States.

### **Employer organisation density**

Employer organisations' density in the textile and clothing sector is measured in terms of both the sectoral workforce and the companies in the sector. At EU27 level, the average employer organisation has a density in terms of affiliated companies of 14%, and the average workforce density is 35%. It should be noted that the incompleteness of the data obtained by the national correspondents means that it is difficult to compare relative membership strength among Member States. Fewer than 50% of the employer organisations have data regarding the number of affiliated companies and regarding the workforce employed in affiliated companies. Low company density is found in eastern and central European Member States, as well as in western European Member States with high levels of fragmentation, such as Spain and France. Similarly, low workforce density (below the EU average) is encountered in most central and eastern European Member States, with Croatia, Latvia and Slovenia being the exceptions.

### **Collective bargaining**

In total, 33 employer organisations (63%) are involved in collective bargaining. Over one-third of sector-related employer organisations (37%) do not conduct collective bargaining. Average collective bargaining coverage of the sector is 55%. Of the 33 employer organisations that are involved in collective bargaining, 31 are involved exclusively in sector-level collective bargaining. In Italy, two employer organisations conduct collective bargaining at both sector and company levels. No employer organisation conducts only single-employer collective bargaining (at company level).

Collective bargaining in which employer organisations are involved tends to cover a high proportion of the workforce. Manufacture of textiles (NACE 13) is covered in collective bargaining by 26 employer organisations (50%) and manufacture of wearing apparel (NACE 14) in collective bargaining by 28 (53%).

### **Social dialogue**

Involvement in social dialogue – tripartite or bipartite social dialogue and consultation by the government on sector-related matters – is widespread among the employer organisations in the sector. More than half of them are involved in bipartite or tripartite social dialogue (62%). In all Member States except Estonia, Greece, Ireland, Latvia

and Portugal (for which only partial data are available), at least one of the employer organisations is involved in bipartite or tripartite social dialogue.

Almost two-thirds of the employer organisations (71%) are consulted by the government on sector-related matters. Except for three Member States (Ireland, Latvia and Malta), in all the countries at least one employer organisation is consulted by the government.

Apart from three employer organisations, in Ireland, Latvia and Malta, all the sector-related employer organisations are involved in collective bargaining or bipartite or tripartite social dialogue or they are consulted by the government on sector-related matters. It should be mentioned that those three organisations provide assistance and consultation to their affiliates that are involved in collective bargaining at company level.

### **Collective bargaining and sectoral social dialogue at national level**

The social partners are involved in sector-related collective bargaining in most of the EU Member States. The involvement of trade unions in sector-related collective bargaining is greater than that of employer organisations: 88% of trade unions are involved in collective bargaining compared with 63% of employer organisations. This situation results from the fact that company-level (single-employer) collective bargaining, found in 12 Member States, is usually conducted by the company management/owner and not by an employer organisation. Of 52 sector-related employer organisations, none conducts collective bargaining at company level. In contrast, trade unions in the sector are involved in both multi-employer and single-employer collective bargaining, which ultimately leads to the greater involvement of unions in collective bargaining.

Multi-employer (sector-level) collective bargaining in the textile and clothing sector takes place in 14 Member States, including 9 where it coexists with single-employer (company-level) collective bargaining. Another 12 Member States are characterised by single-employer collective bargaining only. With a few exceptions, multi-employer collective bargaining tends to be characteristic of western and Nordic Europe (older Member States), while single-employer collective bargaining is dominant in central and eastern Europe (newer Member States). Greece is the only Member State with no collective bargaining; none has taken place in the sector since 2008.

As a rule, Member States in which both multi-employer and single-employer collective bargaining take place tend to have higher collective bargaining coverage. Of nine Member States where both single-employer and multi-employer collective bargaining are conducted (Belgium, Spain, France, Italy, the Netherlands, Slovenia, Denmark, Bulgaria and Czechia), six have a collective bargaining coverage exceeding 94% (Belgium, France, Italy, the Netherlands, Slovenia, Spain). Lower collective bargaining coverage in the textile and clothing sector is characteristic of the Member States where only company-level collective bargaining takes place. Only 4 countries (Croatia, Hungary,

Malta, Romania) out of 12 in which only company-level collective bargaining exists have a collective bargaining coverage above 50%. In another six of these Member States (Cyprus, Estonia, Ireland, Latvia, Poland and Slovakia) collective bargaining coverage is below 24% (for two of these Member States, Lithuania and Luxembourg, data regarding collective bargaining coverage are not available).

Most social partners in the textile and clothing sector are consulted by the government on sector-related matters. More than half of the trade unions and over two-thirds of the employer organisations are consulted. The share of employer organisations consulted (71%) is slightly higher than the share of unions consulted (53). At EU27 level, in two-thirds of Member States (18) at least one sectoral trade union and one sectoral employer organisation are consulted by the government.

More than half of the sectoral trade unions (59%) and more than half of the employer organisations (62%) are involved in bipartite or tripartite social dialogue in the sector. In total, 15 Member States have 37 sector-related bipartite or tripartite bodies. The main topics discussed in these bodies are training and vocational education, working conditions, health, welfare and social security.

## Representativeness of the European social partners

Both IndustriAll Europe and Euratex are recognised by the Directorate-General for Employment, Social Affairs and Inclusion as organisations to be consulted under Article 154 TFEU. Euratex and IndustriAll Europe have also both confirmed and clarified their capacity to negotiate binding arrangements, with provisions for mandating and decision-making mechanisms to agree on negotiated texts on behalf of all their national affiliated organisations in the sector.

### Representativeness of IndustriAll Europe

Of 66 sector-related trade unions, 50 are affiliated to IndustriAll Europe (4 of these, in Denmark and Poland, are affiliated indirectly through an umbrella organisation). Trade unions affiliated to IndustriAll Europe are found in 26 Member States – Greece has no affiliated sectoral trade union. In 24 Member States, the trade union with most members in the sector is affiliated to IndustriAll Europe. The exceptions are Cyprus, Greece and Poland (in Cyprus, the difference between the two trade unions is very small, due to very low membership).

A comparison between IndustriAll Europe affiliates and other sector-related trade unions demonstrates that trade unions affiliated to IndustriAll Europe tend to have higher sectoral coverage (in terms of NACE subcodes covered, types of workers covered and coverage of the entire country), but also higher levels of collective bargaining and social dialogue involvement. In terms of workforce density, however, the IndustriAll Europe affiliates have the same average density (12%) as that of all 66 trade unions present in the EU27.

Regarding domain coverage, the data indicate that, compared with the 66 sector-related unions in the EU27, the 50 IndustriAll Europe members tend to have a slightly broader membership domain: 84% of IndustriAll Europe affiliates cover both parts of the sector and other sectors, in contrast with only 70% of all sector-related trade unions. This means that IndustriAll Europe affiliates are particularly representative among trade unions active in other sectors too.

Similarly, regarding sectoral coverage, the data indicate that IndustriAll Europe affiliates cover 8 out of 11 sector-related NACE subcodes (77%), compared with 7 NACE subcodes (66%) in the case of all sector-related trade unions. More than half of the IndustriAll Europe affiliates (27 trade unions, 54%) in the textile and clothing sector cover all 11 NACE subcodes in the sector, 10 percentage points more than all sector-related trade unions (45%). These data point to the conclusion that, overall, unions affiliated to IndustriAll Europe have higher sectoral coverage in terms of NACE subcodes and that unions with high sectoral coverage are overrepresented among IndustriAll Europe affiliates.

The data also show that IndustriAll Europe affiliates have greater geographical coverage and greater coverage in terms of types of workers than sector-related trade unions as a whole: almost three-quarters (78%) of unions affiliated to IndustriAll Europe cover all types of workers and almost all of the IndustriAll Europe affiliates (94%) cover the entire country.

Among the IndustriAll Europe affiliates, 92% (46 trade unions) are involved in collective bargaining in the sector. Of the 58 sectoral trade unions involved in collective bargaining, 46 are affiliated to IndustriAll Europe (79%). Only four of the unions affiliated to IndustriAll Europe (in Estonia, Latvia and Spain) are not involved in collective bargaining.

In addition, the IndustriAll Europe affiliates tend to be more involved in both single-employer and multi-employer collective bargaining: 66% of the unions affiliated to IndustriAll Europe conduct multi-employer collective bargaining, compared with 36% of all sector-related unions. In turn, the involvement of IndustriAll Europe affiliates in single-employer bargaining only is lower – only 26% compared with 30% for all sector-related organisations.

The collective bargaining coverage of NACE subcodes in the sector is also higher. Manufacture of textiles (NACE 13) and manufacture of wearing apparel (NACE 14) are each covered by the collective bargaining of 43 sector-related IndustriAll Europe affiliates. This represents 84%, compared with 74% coverage for NACE 13 and 76% for NACE 14 among all sector-related unions. The average number of NACE subcodes in the textile and clothing sector covered by the collective bargaining of IndustriAll Europe affiliates is 7.7 (out of 11 in total), higher than for all sector-related trade unions, for which the average number of covered NACE subcodes is 5.8.

Over two-thirds (68%) of the unions affiliated to IndustriAll Europe in the EU27 are involved in bipartite or tripartite social dialogue (compared with 59% for all sector-related unions). In all the Member States except Cyprus, Estonia, Ireland and Malta, at least one of the unions affiliated to IndustriAll Europe is involved in bipartite or tripartite social dialogue. A high proportion (60%) of the unions affiliated to IndustriAll Europe are consulted by the government on sector-related matters. Except in four Member States (Cyprus, Czechia, Ireland, Malta), at least one of the unions affiliated to IndustriAll Europe is consulted by the government. With one exception (ELA in Spain), all the sector-related trade unions that are affiliated to IndustriAll Europe are either involved in collective bargaining or involved in bipartite or tripartite social dialogue or consulted by the government on sector-related matters.

There are 16 trade unions in the textile and clothing sector that are not affiliated to industriAll Europe and thus not represented in the European sectoral social dialogue committee. They are listed in table 39 in the main report. The 12 Member States where there are sectoral trade unions not affiliated to industriAll Europe are: Belgium, Cyprus, France, Greece, Hungary, Italy, Luxemburg, the Netherlands, Poland, Romania, Spain and Sweden. An assessment of the affiliation of sectoral trade unions to other European trade union organisations is made in section 3.5 of the main report.

### Representativeness of Euratex

Of a total of 52 employer organisations in the textile and clothing sector, 23 are affiliated to Euratex in 19 out of 24 Member States where sector-related employer organisations exist. Euratex members make up 44% of employer organisations in the sector. In 17 Member States, the largest employer organisations in the sector are affiliated to Euratex.

The company density of the 20 Euratex affiliates for which data is available is 14%, identical to the density of all sector-related employer organisations. The average workforce density of the 17 Euratex affiliates in the sector for which data is available is 47%, slightly higher than the average workforce density of all sector-related employer organisations (35%). This indicates that employer organisations with higher workforce density are slightly overrepresented among Euratex affiliates.

Just under half of the employer organisations affiliated to Euratex (48%) have member companies in both textile and clothing manufacturing and in other sectors. Overall, Euratex affiliates in the textile and clothing sector tend to have a fairly similar membership domain pattern to the sector-related employer organisations as a whole.

Around two-thirds (61%) of the Euratex affiliates cover all 11 NACE subcodes in the textile and clothing sector, compared with only 42% for all sector-related employer organisations. It can therefore be inferred that employer organisations with high membership domain width are overrepresented among Euratex sectoral affiliates.

Most Euratex affiliates accept all types of companies among their members (91%) throughout the entire country (96%). Compared with all employer organisations in the sector, the coverage of Euratex affiliates in terms of companies of all sizes and full geographical coverage is slightly higher (81% and 90%, respectively, for all sectoral employer organisations).

The involvement of Euratex affiliates in collective bargaining is similar to the overall involvement of employer organisations in the sector. Over two-thirds (70%) of the sectoral organisations affiliated to Euratex are involved in collective bargaining, compared with 63% in the entire sector. Most Euratex-affiliated employer organisations that are involved in collective bargaining participate solely at sector level (multi-employer bargaining). Only one employer organisation, in Italy, is involved in both sector- and company-level collective bargaining.

Of the 33 sectoral employer organisations involved in collective bargaining, 16 (48%) are affiliated to Euratex. Of the 23 Euratex-affiliated organisations, these 16 account for 70%. Therefore, 30% of Euratex-affiliated employer organisations are not involved in collective bargaining. The reasons for not participating in collective bargaining vary from one Member State to another: for example, in Greece social partners are deterred from signing sectoral collective employment agreements by legislation; in Croatia and Latvia, there are only business associations, not employer organisations, and they are not legally entitled to conduct collective bargaining.

The collective bargaining coverage of NACE subcodes by Euratex-affiliated employer organisations is not very high: manufacture of textiles (NACE 13) is covered by the collective bargaining of 13 employer organisations (57% of the Euratex affiliates). The same number of employer organisations cover manufacture of wearing apparel (NACE 14) in collective bargaining. These percentages are similar to the proportions of all sector-related employer organisations whose collective bargaining covers textiles (50%) and clothing (54%).

Half (50%) of the Euratex-affiliated employer organisations cover all NACE 13 subcodes, compared with 46% of all sector-related employer organisations. Over one third (39%) covers all NACE 14 subcodes, compared to 44% of all sector-related organisations. The average number of NACE subcodes covered by the collective bargaining of the Euratex affiliates is similar to the number of NACE subcodes covered by all sector-related organisations.

Compared with all sector-related employer organisations, the Euratex affiliates in the textile and clothing sector tend to be more involved in bipartite or tripartite social dialogue and more often consulted by the government on sector-related matters. Of the Euratex affiliates, 74% are involved in bipartite or tripartite social dialogue, in contrast with only 62% in the case of all sector-related employer organisations. Almost all the employer organisations affiliated to Euratex (94%) are consulted by the government on sector-related matters, compared with 71% of all sector-related organisations.



All the Euratex-affiliated employer organisations are involved either in collective bargaining or in bipartite/tripartite social dialogue or are consulted by the government. While their collective bargaining involvement is similar to that of all sector-related organisations, the Euratex affiliates are involved to a greater extent in other forms of social dialogue, such as bipartite or tripartite social dialogue and sector-related public policymaking (through government consultation).

There are 29 employer organisations in the textile and clothing sector that are not affiliated to Euratex. They are listed in table 42 in the main report. The 16 Member States where there are employer organisations not affiliated to Euratex are: Austria, Bulgaria, Croatia, Denmark, Estonia, France, Greece, Ireland, Italy, Latvia, Malta, the Netherlands, Poland, Portugal, Romania, Slovenia. An assessment of the affiliation to other European associations is made in section 3.7 of the main report.

## References

Euractiv (2016), *European textiles and fashion: Facts and figures*, web page, accessed 5 October 2022.

Euratex (2019), 'European textile and clothing sector consolidates satisfactory evolution in 2018', press release, 15 May.

Eurofound (2016), *ERM annual report 2016: Globalisation slowdown? Recent evidence of offshoring and reshoring in Europe*, Publications Office of the European Union, Luxembourg.

Flanders Investment and Trade (undated), *Flanders' textile industry weaves past and future*, web page, accessed 28 September 2022.

TEKO (Swedish Textile and Clothing Industries Association) and Marknads Akademien (2015), *The Swedish textile industry: Statistics and analysis 2015*, Stockholm.



This document examines the process of assessing the representativeness of the actors involved in the European sectoral social dialogue committee for the textile and clothing sector. It summarises the findings from a comprehensive study on representativeness in this sector (see web link in ‘Further information’ below). The study identifies IndustriAll Europe – representing employees – and Euratex – representing employers – as the representative European-level social partner organisations in the textile and clothing sector.

### About Representativeness studies

Representativeness is a criterion used by the European Commission to identify the ‘management and labour’ whom it must consult under Article 154 of the Treaty on the Functioning of the European Union (TFEU), and who may initiate social dialogue leading to Council decisions under Article 155 of the same treaty. In 2006, the Commission mandated Eurofound to carry out studies on the representativeness of European sectoral social partner organisations.

These representativeness studies are designed to provide basic information needed for the setting up and functioning of sectoral social dialogue committees at European level. The sectoral social dialogue committees are the mechanism used by the Commission to consult management and labour under Article 154 TFEU.

### Further information

The report *Representativeness of the European social partner organisations: Textile and clothing sector* is available on the Eurofound website at <https://www.eurofound.europa.eu/observatories/eurwork/representativeness-studies>

**Authors:** Victoria Stoiciu and Peter Kerckhofs

**Research manager:** Peter Kerckhofs

**Research project:** Representativeness studies (170203)

information@eurofound.europa.eu

www.eurofound.europa.eu

© European Foundation for the Improvement of Living and Working Conditions, 2022

Cover image: © ndabcreativity/Adobe Stock

EF/22/047/EN



Publications Office  
of the European Union

ISBN 978-92-897-2305-3

doi:10.2806/361331