RESEARCH REPORT

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

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Eurofound

European Foundation for the Improvement of Living and Working Conditions

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DE	Germany	**IE**	Ireland	**RO**	Romania
DK	Denmark	**IT**	Italy	**SE**	Sweden
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Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners – that is, the trade unions and employer organisations – in the textile and clothing sector and to show how they relate to the sector's European-level organisations representing employees and employers.

The report is divided into three parts: an overview of the economic specificities of and the employment trends in the textile and clothing sector; an analysis of the social partner organisations in the 27 EU Member States;[1] and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the textile and clothing sector, which was established first as an informal forum for European social dialogue in 1992 and as an ESSDC in its current form in 1999.

0.1. Objectives of the study

Representativeness studies are conducted for four reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is one eligibility criterion for setting up or participating in an ESSDC.
- Representativeness also means having the capacity to negotiate agreements that can be implemented by Council decision, as provided for by Article 155 of the TFEU.
- This study can also offer guidance for future capacity-building initiatives.

Representativeness is defined by Commission Decision 98/500/EC on the establishment of sectoral social dialogue committees promoting dialogue between social partners at European level (European Commission, 1998). For an organisation to be recognised as a representative EU social partner organisation, it must:

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

To accomplish its aims, this study first identifies the relevant national social partner organisations in the textile and clothing sector before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at

[1] This research was planned prior to the UK's withdrawal from the European Union on 31 January 2020 and therefore includes data relating to the 27 current EU Member States and the UK. The UK data can be found in Annex 1.

both national and European levels. The study includes only those organisations whose membership is classified as 'sector-related' (see Section 0.3, 'Definitions and methodology', for further information).

0.2. Historical background on European social dialogue in the textile and clothing sector

European social dialogue in the textile and clothing sector started in 1992 in an informal working group with the participation of the European Trade Union Federation: Textiles, Clothing, Leather (ETUF-TCL) and the European Apparel and Textile Confederation (Euratex). In 1999, a formal ESSDC was established following Commission Decision 98/500/EC.

Since 1994, the European social partners in the textile and clothing sector have adopted 14 joint texts (Table 1). The work of the committee has covered a wide range of issues, including gender equality, working conditions, employment and procurement. A key outcome has been a code of conduct framework agreement, adopted in 1997 to promote respect for core labour standards. ETUF-TCL and Euratex called on their members to comply with standards established by the International Labour Organization.

ETUF-TCL merged with the European Metalworkers' Federation (EMF) and the European Mine, Chemical and Energy Workers' Federation (EMCEF) to form IndustriAll Europe in 2012.

The committee is currently focusing on a range of topics, such as health and safety issues, skills, corporate social responsibility and external trade negotiations. It is also following the European Commission's initiatives in the areas of industrial policy and competitiveness.

Table 1: Texts adopted through European-level social dialogue in the textile and clothing sector, 1994–2022

Date	Topic	Type	Title	Addressee	Signed by ETUF-TCL or IndustriAll Europe and by Euratex	Signed by any other organisation
16/06/1994	Gender equality	Guidelines	Joint opinion on improved access to vocational training for women in the textile and clothing sector	National organisations	Euratex ETUF-TCL	
10/07/1997	Employment	Joint opinion	Joint declaration of Euratex and ETUC-TCL on employment in the textile and clothing sector in Europe	European institutions/ national authorities	Euratex ETUF-TCL	
11/07/1997	Working conditions	Code of conduct	A charter by the social partners in the European textile and clothing sector: Code of conduct	National organisations	Euratex ETUF-TCL	

13/07/1998	Working conditions	Joint opinion	Letter to Mr Santer and Mr Flynn on the Commission communication on non-declared work	European Commission	Euratex ETUF-TCL	
29/03/1999	Social dialogue	Procedural text	Rules of procedures for the sectoral dialogue committee in the textile and clothing sector	European social partners	Euratex ETUF-TCL	
01/06/1999	Employment	Joint opinion	Follow-up on sectoral social dialogue in the textile and clothing and footwear sector	European institutions/ national authorities	Euratex ETUF-TCL	CEC
20/12/1999	Social aspects of Community policies	Joint opinion	Joint declaration by the social partners in the 'textile and clothing' sector (Euratex and FSE:THC [ETUF-TCL]) on the sectoral dimension of the observatory on industrial change	European institutions/ national authorities	Euratex ETUF-TCL	
18/02/2000	Gender equality	Tool	Equal opportunities: Vade mecum – Best practices in the textile and clothing industry	National organisations	Euratex ETUF TCL	
01/03/2000	Employment	Joint opinion	Lisbon Summit: contribution of textile and clothing social partners	European institutions/ national authorities	Euratex ETUF-TCL	
05/06/2000	Social aspects of Community policies	Joint opinion	Social action programme	European institutions/ national authorities	Euratex ETUF-TCL	
01/01/2005	Public procurement	Tool	Public procurement awarding guide for the clothing-textile sector	European institutions/ national authorities	Euratex ETUF-TCL	
01/05/2008	Restructuring	Tool	Restructuring recommendations: How to secure better anticipation and management of industrial change and sectoral restructuring	National organisations		Syndex, Cédac

09/07/2020	Economic and/or sectoral policies	Joint opinion	Joint declaration on the economic impact of COVID-19 on the textile, clothing, leather and footwear industries	European institutions/ national authorities	Euratex IndustriAll Europe	
04/07/2022	Economic and/or sectoral policies	Joint opinion	Joint declaration on the EU Textile Strategy, covering resilience, skills, digitalisation, social dimension	European institutions/ nNational authorities	Euratex IindustriAll Europe	

Source: *Compiled by the authors using the European Commission's social dialogue texts database, 2022*

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity (European Commission, 1998). Each of these criteria will be defined in this section, starting with sector-relatedness – that is, the demarcation of the textile and clothing sector by agreement with the social partners and the European Commission.

Sector-relatedness

To assess how trade unions and employer organisations relate to the sector, this study analyses the scope of their membership in terms of types of workers, companies and activities. How the sector is defined is crucial for the assessment of sector-relatedness. In this study, the textile and clothing sector is defined using NACE[2] codes 13.1–13.3, 13.9, 14.11–14.14, 14.19, 14.20, 14.3 and 14.31 (Table 2).

Table 2: Demarcation of the textile and clothing sector based on NACE codes

NACE 13	Manufacture of textiles
13.1	Preparation and spinning of textile fibres
13.2	Weaving of textiles
13.3	Finishing of textiles
13.9	Manufacture of other textiles (including knitted and crocheted fabrics; made-up textile articles except apparel; carpets and rugs; cordage, rope, twine and netting; non-woven textiles; other technical and industrial textiles)
NACE 14	Manufacture of wearing apparel
14.11	Leather clothes
14.12	Workwear

[2] NACE refers to the European statistical classification of economic activities – specifically, NACE Rev. 2. To demarcate a specific sector, reference is made to a number of NACE codes.

14.13	**Other outerwear**
14.14	**Underwear**
14.19	**Other wearing apparel and accessories**
14.20	**Articles of fur**
14.3 **14.31**	**Knitted and crocheted apparel** **Knitted and crocheted hosiery and other knitted and crocheted apparel**

Note: *When this study was being finalised, it was indicated that NACE 20.6, production of man-made fibres, can also be considered part of the textile and clothing sector. However, no information on this activity had been collected, so it was not included in the study.*

Source: NACE (Rev.2)

Table 3 shows the possible membership domain patterns of social partner organisations. The membership domains of trade unions and employer organisations may be exactly in line with the demarcation of the sector (i.e., in this case, covering all activities in NACE codes 13 and 14); this type of sector-relatedness is called 'congruence'. If the organisation's membership domain goes beyond the textile and clothing sector as described here, it is categorised as 'overlapping'. 'Sectional' is a type of sector-relatedness whereby an organisation covers a part of the sector and nothing else, whereas organisations that fall into the category of 'sectional overlap' cover part of the sector but also have members in other sectors.

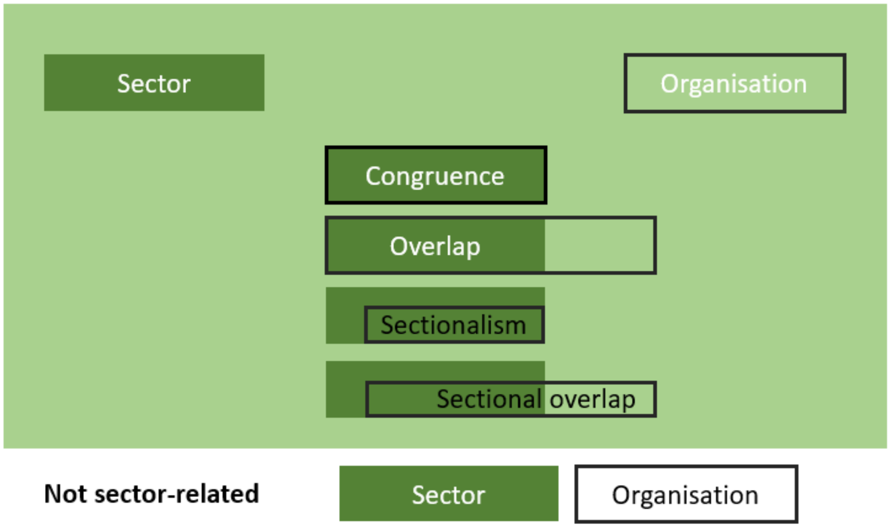
Table 3: Domain patterns of the members of an organisation

<table>
<tr><th rowspan="2">Domain pattern</th><th>Domain of organisation within the sector</th><th>Domain of organisation outside the sector</th></tr>
<tr><td>Does the domain of the trade union/employer organisation cover potentially all employees/companies in the sector?</td><td>Does the trade union/employer organisation also potentially represent employees/companies outside the sector?</td></tr>
<tr><td>Congruence</td><td rowspan="2">Yes</td><td>No</td></tr>
<tr><td>Overlap</td><td>Yes</td></tr>
<tr><td>Sectionalism</td><td rowspan="2">No</td><td>No</td></tr>
<tr><td>Sectional overlap</td><td>Yes</td></tr>
</table>

Source: Eurofound; unless otherwise indicated, the source of all tables and figures is Eurofound

Figure 1 depicts the four different types of sector-relatedness.

Figure 1: Four different types of sector-relatedness



Multisectoralism of associations organising workers and companies in the textile and clothing sector is also analysed, in Section 2.8. This analysis looks at the proportions of national trade unions and employer organisations that are representative in other sectors with ESSDCs. If such multisectoralism entails shared interests on certain topics, this may support future cooperation across ESSDCs.

Membership

Membership is another important aspect of representativeness, and this study looks at two levels. First, the geographical coverage of the EU-level organisations (the Member States where the EU-level trade union/employer organisation has affiliates) and, second, the organisational density of the national affiliates. An important aspect that must be assessed is whether the EU-level players organise most of the national-level players, or at least the most significant ones in relation to their membership strength in the sector and their involvement in collective bargaining, and whether there are any major gaps in their membership domains.

Membership of a social partner organisation requires payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Taking into account the limits of transparency, this study does not always distinguish between different membership statuses. Where possible, indirect membership (i.e. membership via another organisation to which the employer organisation or trade union is affiliated) is taken into account.

Organisational capacity

The organisational capacity of the European social partners is analysed in terms of their ability to commit themselves on behalf of their members and to reach binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess their capacity to negotiate, the **actors** and the objectives and decision-making structures set out in their statutes are considered, as are the **outcomes** in terms of texts agreed. The **processes** through which the organisations have obtained mandates, support and approval from their member organisations in negotiation processes are also considered.

The **involvement of social partners' members in national-level collective bargaining** is also important, as it shows that they are able to obtain a mandate to negotiate on behalf of their members (at least at national level, which could then translate to a mandate to negotiate at EU level). Such a mandate, whether implicit or explicit, allows for negotiations to take place at European level that could potentially result in binding agreements or the drafting of autonomous agreements (requiring implementation by social partners at national level in line with their respective practices and traditions). The capacity to act autonomously in this way among those represented on the ESSDC contributes significantly to the effectiveness of the committee.

The involvement in collective bargaining of national sector-related trade unions and employer organisations is also a factor that distinguishes them from professional associations and business associations, which only defend their members' interests through unilateral lobbying activities and are not involved in negotiations on working conditions through collective bargaining or social dialogue. Trade unions and employer organisations that do engage in collective bargaining on behalf of their members have a proven capacity to obtain a mandate from their members to negotiate and to make compromises and agreements with organisations representing different interests. In its analysis, this report aims to distinguish between these different types of organisations.

Finally, representativeness also depends upon the organisations' structures and resources and their capacity to encourage the active participation of their members and reflect in combination the various interests of member organisations, as well as their potential to act autonomously at European level. **Effective participation in the ESSDC** is assessed in terms of presence at committee meetings in the two years before the year of publication of this report.

0.4. Data collection and quality control measures

Representativeness studies combine a top-down and a bottom-up approach. The top-down approach includes all sector-related affiliates of IndustriAll Europe and Euratex. The bottom-up approach looks at the organisations organising employees or companies and/or that are involved in sector-related collective bargaining and social dialogue in the EU Member States and their membership of European-level organisations.

Unless otherwise specified, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates were provided rather than leaving a question blank. Thus, quantitative data may stem from three sources:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the respective organisations
- estimates, expert opinions and assessments made by Eurofound national correspondents or by representatives of the respective organisations

Other sources used in this report include the European Commission's social dialogue texts database and reports produced by EU-level organisations.

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

First, combining the top-down and the bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents, between June and October 2020. Subsequently, the authors of this report (including the Eurofound Research Manager responsible) checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise them, between January and March 2021. Based on these data, an overview report was drafted by the authors, between April and November 2021. Due to extra work on representativeness studies on other sectors, there were some delays in the planned work in the second half of 2021.

An initial informal (pre-evaluation) consultation with IndustriAll Europe and Euratex was carried out in May 2022. Following comments from the Commission, IndustriAll Europe and Euratex, the draft report was finalised and prepared for formal evaluation by the Eurofound Industrial Relations Advisory Committee, together with the European-level sectoral social partners identified in the report and staff of the Directorate-General for Employment, Social Affairs and Inclusion, through a written procedure, between 16 June and 11 July 2022. Following this evaluation, final corrections were made, and the report was edited and formatted, after which the study was published on the Eurofound website.

These procedures allow all relevant actors and organisations mentioned in this report to check the consistency of the information, ensuring that the bottom-up approach has included all relevant sector-related organisations from their country. Social partner organisations can consider the information reported on other organisations in the same country and, if necessary, comment on the credibility or accuracy of that information, which promotes mutual evaluation and recognition.

These quality assurance measures and the evaluation and approval by the Eurofound Advisory Committee on Industrial Relations – which consists of representatives of both sides of industry, governments and the European Commission – together with the European-level sectoral social partners identified in the report ensure the legitimacy of the findings of this study.

0.5. Structure of the report

The report consists of three main parts, beginning with a brief summary of the economic background and employment specificities of the textile and clothing sector. The second part then analyses the relevant social partner organisations in the 27 EU Member States. The third part identifies the representative associations at European level.

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 conclude on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in European social dialogue. The information and analyses provide the evidence base for further efforts and decisions by the social partners themselves and the European Commission.

1. Economic background and employment trends in the sector

Textile and clothing is a diverse sector that plays an important role in the European manufacturing industry, employing around 1.5 million people (see Table 4) and producing a turnover of €178billion in 2018 in the EU27 (Euratex, 2018). The sector has been subject to numerous transformations, including the emergence of global competitors, addressing environmental issues, technological transformations and, in 2004, the elimination of import quotas (Euratex, 2019). Despite these transformations, leading to job losses and reduced competitiveness, the sector in Europe has succeeded in remaining a major player in textile and clothing exports throughout the world. In 2018, the sector's extra-EU exports reached 28% of annual turnover – up from less than 20% in 2008 – indicating that the sector is gradually becoming more competitive (Euratex, 2019).

Companies have improved their competitiveness by reducing mass production and concentrating on value-added products, such as high-quality garments that emphasise design or technical textiles. Europe is the second largest exporter of clothing after China, accounting for 29% of the global market (Skills4Smart TCLF 2030, 2018).

The production of technical textiles is a success story in the sector. European producers have become world leaders in markets for technical/industrial and non-woven textiles (Euratex, 2019). Northern European countries in particular, such as Austria, Belgium, Germany, Netherlands and Sweden, have contributed significantly to this type of textile production (European Commission, undated). Efforts by the industry to improve its mix of products can also be seen in labour productivity data from Eurostat: between 2009 and 2017, gross value added per employee in the European industry increased by about 25% for apparel and 30% for the textile subsector (Allianz and Euler Hermes, 2020). The COVID-19 crisis, however, resulted in prolonged periodic lockdowns and changing consumption patterns, endangering these positive trends and presenting new challenges for the sector.

The globalisation process had a profound and often negative effect on the sector, leading to the emergence of highly complex buyer-driven supply chain networks, which increased subcontracting activity massively. As a result, the sector faced increased pressure to move towards the globalisation of social dialogue. Some 13 social dialogue texts were adopted at EU level by European social partners between 1994 and 2020 (see Table 1). In 2000, the International Textile, Garment and Leather Workers' Federation (ITGLWF) adopted a policy on international framework agreements and multinational companies at its World Congress, but progress on negotiating international framework agreements with multinationals in the sector has been slow (Miller, 2004). Recently, however, IndustriAll Global Union has concluded several framework agreements with multinational companies such as Inditex, Esprit and H&M (IndustriAll Global Union, 2019). Under these agreements, IndustriAll and the multinational companies will ensure that fundamental International Labour Organization standards are applied by the companies' contractors, subcontractors and principal suppliers. The agreements also cover adopting the highest standards on trade union rights, health and safety, and environmental practices.

The impact of COVID-19 on the sector was first felt when China, a major exporter of fibres used by European manufacturers and a major destination for apparel exporters, entered lockdown in February 2020. Later, European production was hit by lockdown measures in the Member States. The turnover of the European textile and clothing sector decreased by 19% in 2020 (Allianz and Euler Hermes, 2020).Compared to its pre-pandemic level in Q4 2019, EU employment in the second quarter of 2021 was 4.4% down in textiles and 11.8% down in clothing (Fibre2Fashion, 2021).

Countries with higher exposure to the fashion retail market, such as Italy, were most affected. The seasonal character of the fashion business made it difficult to compensate for losses in the first quarter of 2020, when most countries faced lockdown. Partial reorientation towards production of face masks and personal protective equipment served as a buffer for the sector in many countries; those segments that showed diversification have partially recoverrd.

However, unlike during the 2008–2009 economic crisis, in 2020 there was no deterioration in funding conditions for companies, since various financing schemes undertaken by governments and central banks provided companies with liquidity. Furthermore, compared with 2008, when the sector was struggling with increased penetration of foreign goods, when the COVID-19 crisis hit the textile industry was more competitive, with the trade deficit for textile products having been broadly flat since 2015 (Allianz and Euler Hermes, 2020). In 2020, however, the trade deficit deteriorated strongly, due to massive imports of face masks from China.

1.1. Employment in the textile and clothing sector

In most of the Member States, the textile and clothing sector is characterised by standard employment, with full-time and open-ended labour contracts prevailing. However, some Member States (namely, Bulgaria, Greece and Romania) face specific challenges, such as a high prevalence of immigrant work or informal work. In some countries (for example, Bulgaria), there is a high incidence of home workers, most of whom are part of the informal economy. In Hungary, people living with a disability are heavily present in the sector, with the largest employer hiring only from this demographic (with state support).

In most of the countries, women form the majority of the workforce, which is also largely blue collar. However, in some countries (such as Finland), the relocation of production activities to other countries has led to an increase in white-collar workers, which has eroded the traditional base from which the unions have tended to recruit members.

Self-employment is present in the sector in several Member States. In some countries (such as Czechia, Ireland, Hungary, Malta and Slovakia), it amounts to one-fifth of the total workforce. (See Table 46 in Annex 1 for more on employment characteristics and challenges.)

The orientation towards high added-value products and the recovery of competitiveness have stopped the decline in employment that characterised the sector until 2015. According to Eurostat data, in 2018 the sector employed 1,538,613 people in the EU28. Table 4 shows the number of employees in the sector per EU27 Member State, as well as the percentage of sectoral employees as a share of all employees and as a share of the EU27 sectoral workforce. In around half of the Member States, the share of the textile and clothing sector in total employment is 0.5% or less. The share of national employment does not coincide with the share of the EU sectoral workforce: in some countries, such as

Germany, sectoral employment represents a small percentage of national employment (0.3%), but Germany still has the fifth highest share of textile and clothing employment at European level. Among the top 10 Member States with the highest shares of textile employment, the sector accounts for 1% or less of employment overall in six of them.

On the other hand, in some countries the share of the textile workforce exceeds 1% of the total national workforce but makes up only a minor share of the textile workforce at EU level. This is the case in Estonia and Latvia, where employment in the textile and clothing sector accounts for more than 1% of national employment (1.5%) but less than 1% of EU sectoral employment.

In only one country (Italy) does employment in the textile and clothing sector exceed 20% of the total EU sectoral workforce. In two countries (Romania and Poland), it is between 10 and 20% and in another five it is between 5% and 10% 5% (Portugal, Germany, Bulgaria, Spain and France). In 8 countries, the share of EU sectoral employment is between 1% and 5%. In 10 of them, it reaches maximum 1%.

Table 4: Workforce in the textile and clothing sector, EU27, 2018

MS	Number of people employed in the textile and clothing sector (NACE 13 and 14)	Share of national employment (%)	Share of EU textile and clothing sector workforce (%)
IT	328,365	1.5	22.5
RO	161,060	1.9	11.0
PL	159,363	1.0	10.9
PT	138,915	3.0	9.5
DE	124,763	0.3	8.5
BG	99,412	3.2	6.8
ES	89,067	0.5	6.1
FR	82,726	0.3	5.7
CZ	51,456	1.0	3.5
HU	34,977	0.8	2.4
LT	28,035	2.1	1.9
SK	24,225	1.0	1.7
EL	22,729	0.6	1.6
HR	17,953	1.1	1.2
BE	17,897	0.4	1.2
NL	16,067	0.2	1.1
AT	13,308	0.3	0.9

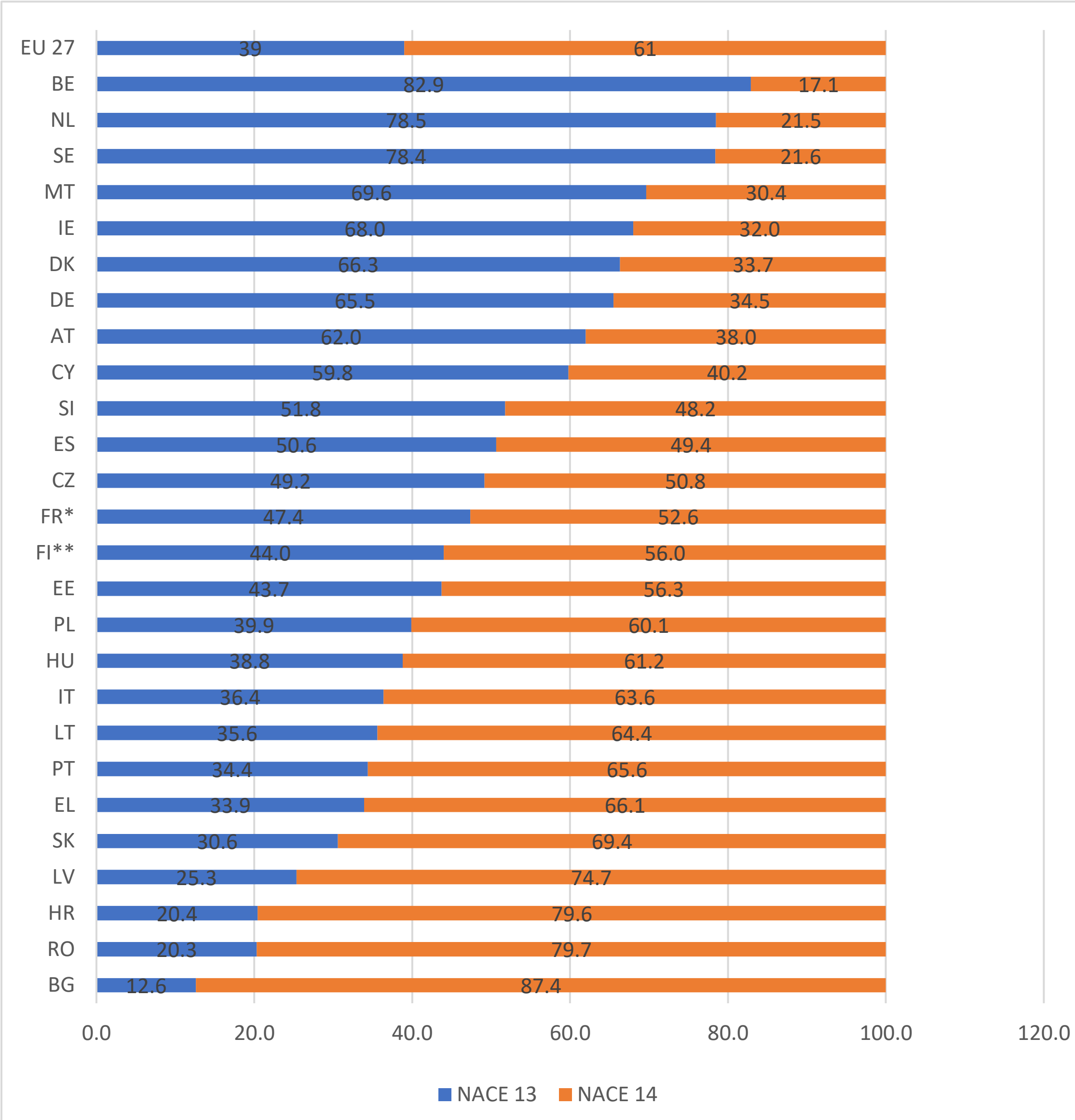
LV	12,317	1.5	0.8
EE	9,759	1.5	0.7
SE	6,528	0.1	0.4
SI	6,478	0.7	0.4
FI	6,093	0.2	0.4
DK	5,319	0.2	0.4
IE	3,149	0.1	0.2
CY	900	0.2	0.1
MT	461	0.2	0.03
EU27	1,461,322	0.8	100

Note: *Countries are ordered according to number of employees in the textile and clothing sector. Data for Luxembourg are missing.*

Source: *Eurostat, Structural Business Statistics, 2018, and EU-LFS, 2018*

The two subsectors – manufacture of textiles (NACE 13) and manufacture of wearing apparel (NACE 14) – differ somewhat in size (Figure 2). Manufacture of wearing apparel accounts for most workers, employing 59% of those working in the sector. Although employment in manufacture of wearing apparel is predominant, it has declined since 2011, when it accounted for 64% of total employment in the sector (Eurofound, 2013).

Figure 2: Employment in NACE 13 and 14, EU27, 2018 (%)



Note: ** Data are for 2017, data for Luxembourg are missing.*

Source: *Eurostat, Structural Business Statistics, 2018*

Table 5 splits the Member States into five groups. The first group (light blue) has a relatively small proportion of the national workforce in the textile and clothing sector and a relatively small proportion of workers in the sector at EU level. A second group (green) is composed of countries that also have a relatively small or a moderate proportion of the national workforce in the textile and clothing sector, but which amounts to a significant part of the EU textiles workforce. In these two groups, which include Belgium, France, Germany, Ireland, the Netherlands and Sweden, 60% of employment in the industry falls under NACE 13.

A third group (grey) is composed of Member States with a relatively high proportion of textile workers in the national workforce but a low proportion of workers in the sector at EU level. The fourth group (yellow) consists of Member States with a relatively high proportion of the national workforce active in the textile and clothing sector, and a relatively high proportion of workers in the sector at EU level. Finally, the fifth group (orange) contains just one country (Italy), and is characterised by a relatively high proportion of national workforce active in the textile and clothing sector and a very high proportion of the EU27 sectoral workforce. As in the case of the third and fourth group, Figure 2 shows that more than 60% of employment in the sector in Italy is accounted for by NACE 14.

Table 5: Countries grouped by proportional size of national textile and clothing sector workforce, EU27

Textile and clothing workforce as a proportion of national workforce (%)	**Textile and clothing workforce as a proportion of EU sectoral workforce (%)**				
	< 1	*1–4.9*	*5–9.9*	*10–19*	*> 20*
< 0.5	AT, CY, DK, FI, IE, MT, SE,	BE, NL	DE, FR		
0.5–0.9	SI, ES	EL, HU,			
1–1.4		CZ, HR, SK		PL	
1.5–1.9	LV, EE			RO	IT
≥ 2		LT	BG, PT		

Source: *Eurostat, Structural Business Statistics, 2018*

Table 6 shows that there is a significant difference between NACE 13 and NACE 14 when it comes to the gender distribution of employment. While in NACE 13 the proportions of men and women employed are relatively balanced, with a slightly higher share of employment among women, in NACE 14 almost five times more women than men are employed.

With regard to NACE 13, nine Member States show the reverse situation from that in the EU as a whole, the share of male employees being higher than that of female employees (the countries in question are Belgium, Denmark, Germany, Greece, Italy, Luxembourg, the Netherlands, Portugal and Sweden). Women's employment in NACE 13 is higher than the EU average in almost all eastern European Member States.

In NACE 14, which is characterised by very high rates of women in the workforce in all Member States, only in two countries (Belgium and Greece) is women's employment lower than 65%. The highest shares of women's employment, exceeding 85%, can be found primarily in eastern European Member States.

This suggests that lower added-value economic activities, concentrated mostly in NACE 14 and in eastern European Member States, tend to make extensive use of a female workforce (probably low-skilled and low-paid). Higher rates of men's employment seem to be characteristic of the part of the sector that produces higher added-value products (NACE 13).

Table 6: Shares of employment in NACE 13 and 14 by gender, EU27, 2018 (%)

MS	Manufacture of textiles, NACE 13		Manufacture of wearing apparel, NACE 14	
	Men	*Women*	*Men*	*Women*
AT	48	52	n.d.	75
BE	60	40	n.d.	64
BG	32	68	11	89
CY	n.d.	n.d.	n.d.	n.d.
CZ	36	64	8	91
DE	54	46	26	74
DK	55	n.d.	n.d.	n.d.
EE	n.d.	74	n.d.	88
EL	80	20	44	56
ES	50	50	25	75
FI	n.d.	n.d.	n.d.	87
FR	48	52	23	77
HR	35	65	12	89
HU	29	72	n.d.	91
IE	n.d.	n.d.	n.d.	n.d.
IT	57	43	33	67
LT	29	71	8	92
LU	75	n.d.	n.d.	n.d.
LV	n.d.	83	n.d.	92
MT	n.d.	n.d.	n.d.	n.d.
NL	76	24	n.d.	75
PL	43	57	11	89
PT	52	48	13	87
RO	19	81	14	86

SE	60	40	n.d.	74
SI	39	61	20	80
SK	n.d.	71	n.d.	93
EU27	**47**	**53**	**18**	**82**

Note: *n.d., no data.*

Source: *Eurostat, EU-LFS, 2018*

As Figure 2 and Table 7 show, in 15 Member States employment in NACE 13 is above the EU27 average. A relatively low share of sectoral employment in NACE 13 seems to be characteristic of eastern European and some southern European Member States. The lowest employment figures in this subsector (not exceeding 20%) are found in the newest Member States, such as Bulgaria, Croatia and Romania. In addition, in Member States such as Portugal and Greece employment in NACE 13 is below the EU average and closer to the levels encountered in eastern European Member States.

A high share of sectoral employment in NACE 13 is characteristic of western European and Nordic Member States. In three Member States, namely Sweden, the Netherlands and Belgium, employment in NACE 13 exceeds 75%.

Correspondingly, eastern European and southern European Member States have high shares of sectoral employment in NACE 14. In newer Member States such as Bulgaria, Croatia and Romania shares of employment in NACE 14 are 80% or higher.

Table 7: Countries grouped by shares of employment in NACE 13 and NACE 14, EU27, 2018

Employment proportions	Member States	Total
≤ 60% in NACE 13 and ≥ 40% in NACE 14	AT, BE, CY, DE, DK, IE, MT, NL, SE	9 Member States
41–59% in NACE 13 and 59–41% in NACE 14	CZ, EE, ES, FI*, FR*, SL	6 Member States
≥ 40% in NACE 13 and ≤ 60% in NACE 14	BG, EL, HR, HU, IT, LT, LV, PL, PT, RO, SK	11 Member States

Note: *Data for Luxembourg are missing. * Data for Finland and France are for 2017.*

Source: *Eurostat, Structural Business Statistics, 2018*

This divide can be explained by labour specialisation, with eastern and southern European Member States specialising in clothing manufacture while western and Nordic countries specialise in manufacture of textiles, often added-value technical and industrial textiles. This is the case in Belgium and Sweden, which have well-developed and innovative smart textile and technical textile industries, one of the fastest growing segments in the sector (TEKO and Marknads Akademien, 2015; Flanders Investment and Trade, undated). In the case of some eastern European Member States, specialisation in clothing manufacturing is closely linked to the lohn system,[3] a characteristic of the sector over the past three decades (Girneata, 2015).[4]

Further analysis of employment by NACE subcode (Figure 3 and Table 8) shows that two-thirds (61%) of sectoral employment at EU level is concentrated in two NACE subcodes: 13.9 (manufacture of other textiles) and 14.13 (manufacture of other outerwear). At the other end of the scale, two NACE subcodes do not exceed 1% of total sectoral employment: 14.11 (manufacture of leather clothes) and 14.20 (manufacture of fur articles). A possible explanation could be the diminishing public acceptance of fur and leather products. The other NACE subcodes represent less than 10% of sectoral employment each, ranging between 3% (13.1, preparation and spinning of textile fabrics) and 7% (14.14, manufacture of underwear).

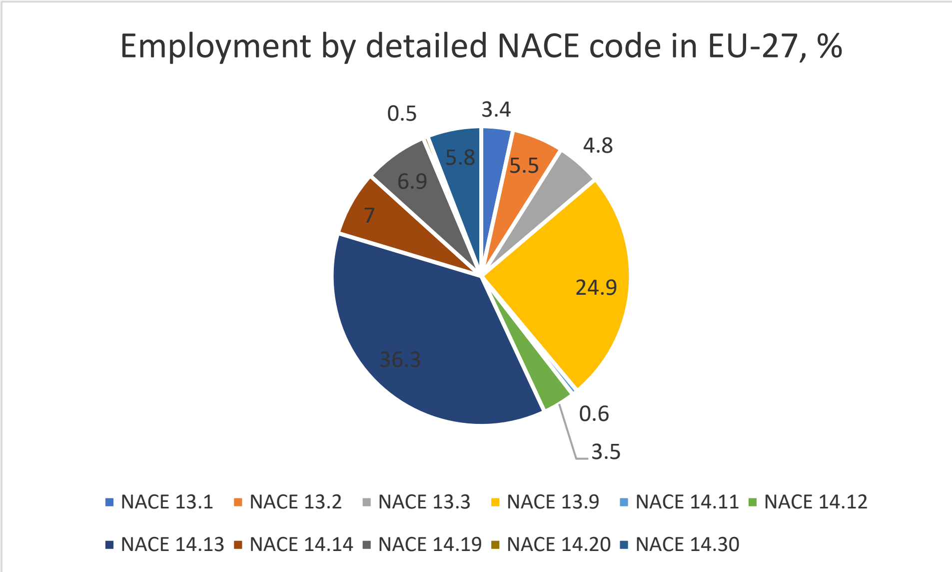
Employment in NACE 13.9 at a level above the EU average can be seen in countries where employment in NACE 13 exceeds 60% (Austria, Belgium, Cyprus, Denmark, Germany, Ireland, the Netherlands, Sweden) or falls between 41 and 59% (Czechia, Estonia, Finland, France, Slovenia, Spain). The exceptions to this rule are Hungary and Poland, where, although employment in NACE 13 is slightly under 40%, employment in NACE 13.9 exceeds the EU average.

Similarly, employment in NACE 14.13 exceeding the EU average occurs only in Member States where employment in NACE 14 is higher than 60%. The countries in which employment in NACE 14.13 is higher than the EU average are all southern or eastern Member States. The reason for this may be that activities in NACE 14.13 are labour intensive and labour costs in southern and eastern Member States are lower than the EU average.

[3] The lohn system is an international economic business practice wherein one company is contracted by another from a different country to produce custom-made products. These are generally produced using designs or drawings and raw materials provided by the customer country, which has the right to trade that product under its own trademark.

[4]https://www.academia.edu/15199360/The_Evolution_of_the_Textile_and_Clothing_Industry_Romania_From_Lohn_to_Loss

Figure 3: Employment by NACE subcode, EU27, 2018 (%)



Source: *Eurostat, Structural Business Statistics, 2018*

Table 8: Employment by NACE subcode, EU27, 2018 (number of employees and percentage of all employment in the sector)

MS	NACE 13		NACE 13.1		NACE 13.2		NACE 13.3		NACE 13.9	
	number	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*
AT	8,246	62	550	4.1	1,988	14.9	500	3.8	5,208	39.1
BE	14,795	83	551	3.1	2,492	13.9	958	5.4	10,794	60.3
BG	12,755	13	4,119	4.1	653	0.7	359	0.4	7,624	7.7
CY	538	60	n.d.	n.d.	n.d.	n.d.	52	5.8	486	54.0
CZ	25,293	49	1,990	3.9	5,417	10.5	586	1.1	17,301	33.6
DE	81,700	65	3,295	2.6	9,852	7.9	13,171	10.6	55,383	44.4
DK	3,547	66	30	0.6	n.d.	n.d.	152	2.8	3,258	60.6
EE	4,266	44	n.d.	n.d.	n.d.	n.d.	148	1.5	3,820	39.1
EL	9,612	34	1,482	5.3	397	1.4	1,318	4.7	6,415	23.0
ES	46,123	51	4,736	5.3	5,596	6.2	8,486	9.4	27,305	30.4
FI	2,632	43	n.d.	n.d.	n.d.	n.d.	257	4.2	2,214	36.2
FR	37,674	44	2,879	3.4	6,147	7.2	1,863	2.2	26,784	31.2
HR	3,663	20	527	2.9	364	2.0	424	2.4	2,348	13.1
HU	13,562	39	1,107	3.2	766	2.2	467	1.3	11,222	32.1
IE	2,156	68	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	1,411	44.4
IT	115,001	36	15,999	5.0	28,611	8.9	19,040	5.9	51,351	15.9
LT	9,978	36	1,453	5.2	1,316	4.7	309	1.1	6,900	24.6
LU	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
LV	3,089	25	44	0.4	180	1.5	163	1.3	2,702	22.1
MT	n.d	n.d	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
NL	12,611	78	131	0.8	752	4.7	1,339	8.3	10,389	64.7
PL	63,352	40	2,859	1.8	3,750	2.4	6,997	4.4	49,746	31.3

MS	NACE 13		NACE 13.1		NACE 13.2		NACE 13.3		NACE 13.9	
	number	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*
PT	47,738	34	2,664	1.9	8,263	5.9	9,672	7.0	27,139	19.5
RO	32,825	20	4,600	2.9	3,034	1.9	3,032	1.9	22,159	13.7
SE	5,117	78	47	0.7	245	3.8	270	4.1	4,555	69.8
SI	3,354	52	658	10.2	n.d.	n.d.	n.d.	n.d.	2,511	38.8
SK	7,410	31	393	1.6	1,096	4.5	139	0.6	5,782	23.9
EU27	**565,542**	**39**	**50,114**	**3.4**	**80,919**	**5.5**	**69,702**	**4.8**	**364,807**	**24.9**

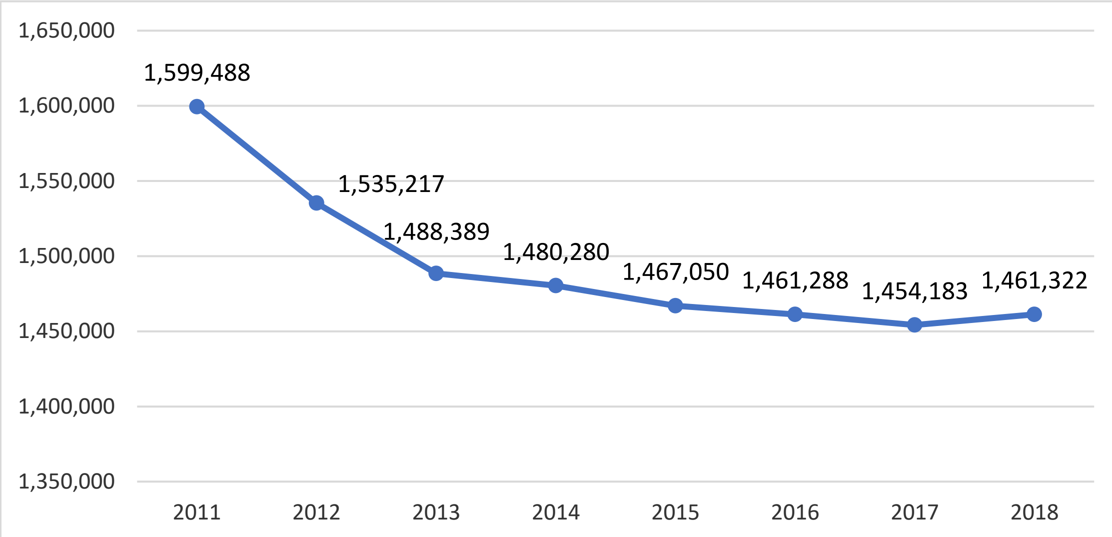
MS	NACE 14		NACE 14.11		NACE 14.12		NACE 14.13		NACE 14.14		NACE 14.19		NACE 14.20		NACE 14.3	
	number	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*
AT	5,062	38	40	0.3	541	4.1	2,584	19.4	588	4.4	420	3.2	78	0.6	811	6.1
BE	3,097	17	n.d.	n.d.	458	2.6	1,465	8.2	n.d.	n.d.	n.d.	n.d.	33	0.2	88	0.5
BG	86,842	87	123	0.1	4,938	5.0	4,7298	47.5	16,330	16.4	10,601	10.6	51	0.1	7,501	7.5
CY	362	40	3	0.3	54	6.0	241	26.8	28	3.1	18	2.0	0	0.0	18	2.0
CZ	26,163	51	217	0.4	3,466	6.7	12,902	25.1	3,100	6.0	4,335	8.4	178	0.3	1,966	3.8
DE	43,063	35	571	0.5	2,800	2.2	20,829	16.7	5,698	4.6	6,073	4.9	n.d.	n.d.	n.d.	n.d.
DK	1,825	34	13	0.2	n.d.	n.d.	577	10.7	n.d.	n.d.	379	7.1	100	1.9	104	1.9
EE	5,493	56	n.d.	n.d.	1,403	14.4	2,240	23.0	n.d.	n.d.	649	6.7	24	0.2	336	3.4
EL	18,311	66	138	0.5	513	1.8	11,459	41.0	2,042	7.3	1,098	3.9	2,481	8.9	580	2.1
ES	43,715	49	118	0.1	1,997	2.2	24,743	27.5	1,687	1.9	10,442	11.6	334	0.4	4,394	4.9
FI	3,490	57	59	1.0	372	6.1	1,879	30.7	85	1.4	636	10.4	n.d.	n.d.	312	5.1
FR	48,060	56	450	0.5	2,573	3.0	22,886	26.7	11,585	13.5	5,109	6.0	254	0.3	5,202	6.1
HR	14,290	80	96	0.5	1,502	8.4	4,556	25.4	2,722	15.2	1,759	9.8	13	0.1	3,642	20.3
HU	21,415	61	156	0.4	2,436	7.0	11,147	31.9	3,697	10.6	1,814	5.2	119	0.3	2,046	5.8

MS	NACE 14		NACE 14.11		NACE 14.12		NACE 14.13		NACE 14.14		NACE 14.19		NACE 14.20		NACE 14.3	
	number	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*	*number*	*%*
IE	1,022	32	n.d.	n.d.	41	1.3	410	12.9	n.d.	n.d.	205	6.5	n.d.	n.d.	n.d.	n.d.
IT	207,050	64	4,106	1.3	2,828	0.9	126,572	39.3	13,257	4.1	32,721	10.2	2,122	0.7	25,444	7.9
LT	18,057	64	33	0.1	1,670	6.0	10,371	37.0	3,126	11.2	1,079	3.8	113	0.4	1,665	5.9
LU	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
LV	9,120	75	28	0.2	1,881	15.4	2,817	23.1	2,348	19.2	918	7.5	20	0.2	1,108	9.1
MT		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
NL	3,456	22	84	0.5	444	2.8	2,315	14.4	60	0.4	433	2.7	4	0.0	117	0.7
PL	95,583	60	1,650	1.0	12,367	7.8	54,865	34.5	8,226	5.2	7,917	5.0	711	0.4	9,847	6.2
PT	91,251	66	101	0.1	1,450	1.0	70,426	50.7	8,366	6.0	3,258	2.3	58	0.0	7,592	5.5
RO	128,401	80	859	0.5	5,679	3.5	89,192	55.3	15,827	9.8	7,425	4.6	137	0.1	9,282	5.8
SE	1,411	22	29	0.4	45	0.7	407	6.2	570	8.7	250	3.8	27	0.4	82	1.3
SI	3,124	48	34	0.5	248	3.8	1,588	24.5	395	6.1	250	3.9	n.d.	n.d.	n.d.	n.d.
SK	16,815	69	80	0.3	1,796	7.4	7,645	31.6	2,386	9.8	2,556	10.6	125	0.5	2,227	9.2
EU27	**896,691**	**61**	**8,988**	**0.6**	**51,502**	**3.5**	**531,414**	**36.3**	**102,123**	**7.0**	**100,345**	**6.9**	**6,982**	**0.5**	**84,364**	**5.8**

Note: *n.d., no data.*
Source: *Eurostat, Structural Business Statistics, 2018*

Eurostat data show that a decline in employment in the textile and clothing sector stopped in 2015, when the number of employees stabilised at some 1.46 million (Figure 4).

Figure 4: Number of people employed in the textile and clothing sector, EU27, 2011–2018

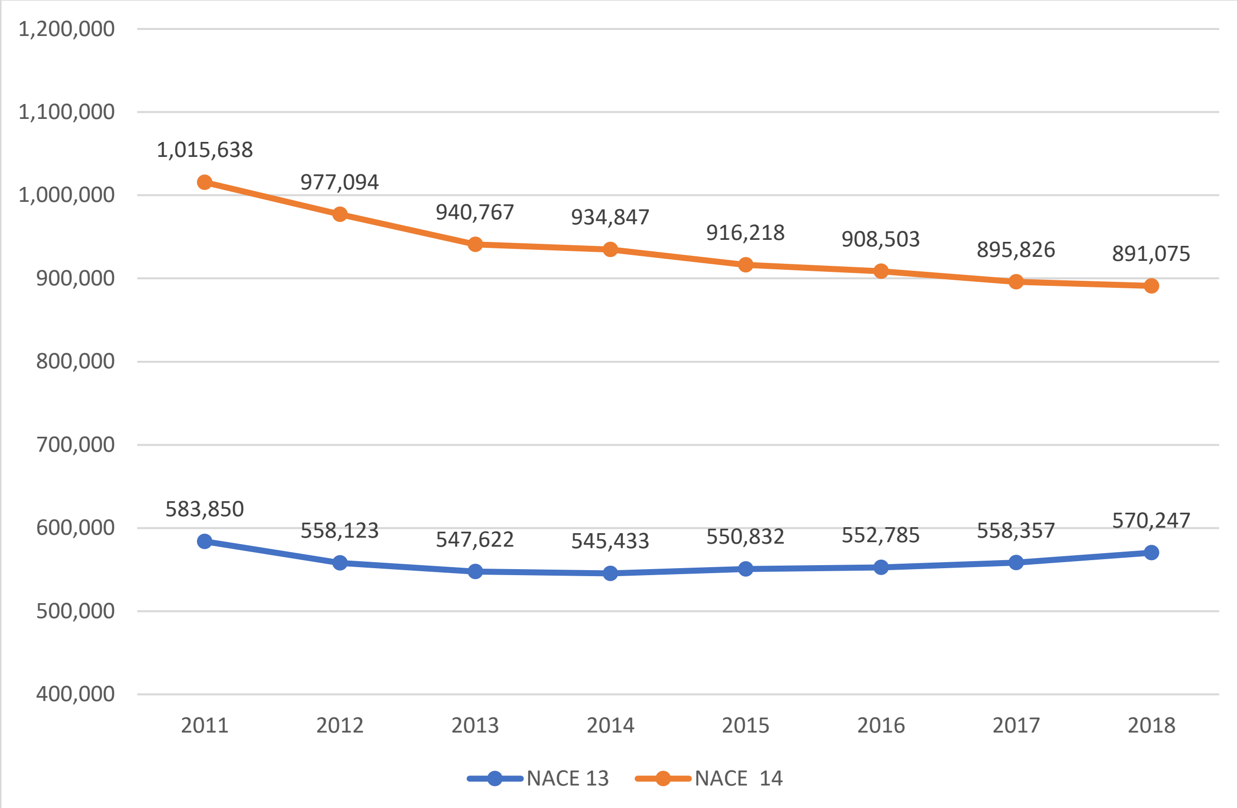


Source: *Eurostat, Structural Business Statistics, 2018*

Job losses were particularly high in the clothing manufacturing subsector (NACE 14); in 2018, employment in the EU27 in NACE 14 was only 88% of the 2011 figure (Figure 5). In contrast, the decline in employment in NACE 13 was less severe, and employment in the EU27 in the subsector in 2018 was 98% of the 2011 figure. Furthermore, the NACE 13 subsector saw a marginal recovery in jobs in 2017–2018 in comparison with 2012–2016.

Further data analysis of the two subsectors reveals clear differences between NACE 13 and NACE 14 in terms of employment trends, as shown in Figure 5. Textile manufacturing jobs decreased by 13,603 (2.3%) between 2011 and 2018, in contrast with the manufacture of apparel, which saw a reduction in jobs of 124,563 (12%). While employment slowly recovered and started to rise after 2015 in NACE 13, the negative trend continued in NACE 14. The stabilisation of employment in the sector after 2015 is entirely due to the recovery in jobs in manufacture of textiles.

Figure 5: Number of people employed in NACE 13 and NACE 14, EU27, 2011–2018 (thousands)



Source: *Eurostat, Structural Business Statistics, 2018*

Figure 6 shows changes in employment in the sector between 2011 and 2018 disaggregated by country. Of 25 countries for which data on employment are available, only five saw job increases between 2011 and 2018: Hungary, Ireland, the Netherlands, Poland and Portugal. In four of these countries (all but Portugal) the overall rise in employment was due exclusively to job increases in the textile manufacturing sector (NACE 13). Eurostat data disaggregated by subsectors and countries show that employment in NACE 13 increased in 12 countries, but – apart from in Hungary, Ireland, the Netherlands, Poland and Portugal – these increases could not compensate for job losses in NACE 14, resulting in an overall decline in employment in the sector. It is also worth mentioning that in Romania and Bulgaria the significant decline in employment was due exclusively to job losses in NACE 14; in both countries, employment in NACE 13 increased. Of the 25 countries, 20 saw job losses between 2011 and 2018. In 9 cases, the reduction amounted to less than 10%. Another five countries had job losses of between 11% and 20%, and six countries suffered job losses 21% or more. The highest percentages were seen in Croatia and Slovenia (35%), closely followed by Belgium (30%).

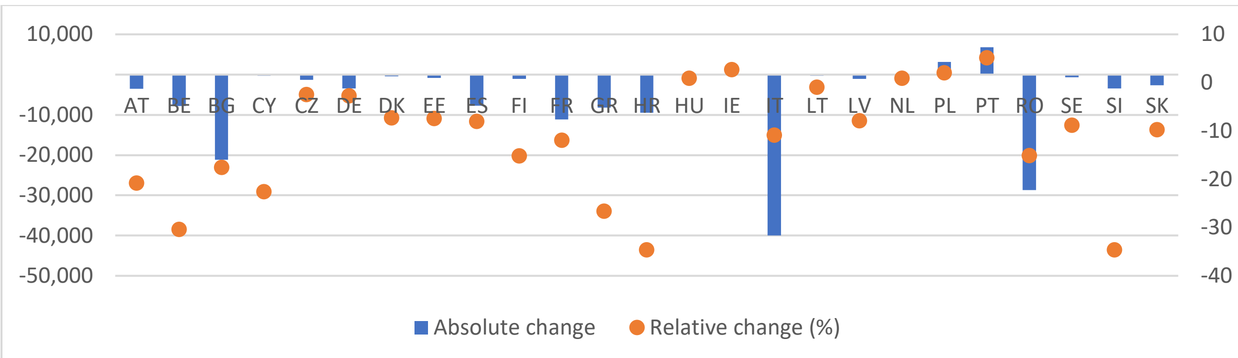
The figures for absolute decline in employment offer a different picture from those for relative decline. The absolute decline in employment was greatest in Italy, Romania and Bulgaria (more than 20,000 jobs lost). All three countries have among the highest sectoral employment rates in the EU (see Table 4), explaining the high numbers of jobs lost. The figures for relative decline in employment in Italy, Romania and Bulgaria put them in the group of countries with medium levels of job losses (between 11% and

20%). The negative trend can also be explained by the rise in overall employment at national level; in all three countries, employment has been increasing since 2010–2011.

While the size of the workforce in the textile and clothing sector has declined in recent years, productivity, expressed in turnover per employee, has significantly increased. This is an important element for the assessment of the sector (Figure 6B). More details on this and on other trends and developments in the sector can be found in the facts and figures report published every year on the Euratex website.[5]

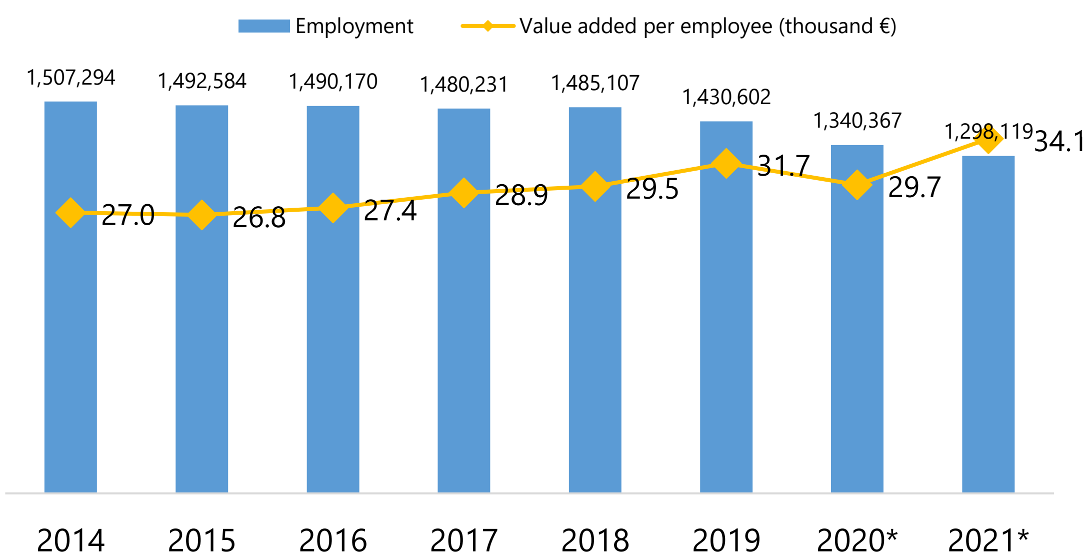
Figure 6: Changes in employment and labour productivity in the textile and clothing sector, EU27

A. Change in employment in absolute numbers and percentages, 2011–2018



Note: *Data for Luxembourg and Malta are missing.*
Source: *Eurostat, Structural Business Statistics, 2018*

B. Changes in employment and labour productivity, 2014–2021



Note: ** Data on employment for 2020 and 2021 are based on estimates.*
Source: *Euratex (2022)*

[5] The Euratex *Facts and key figures* report, updated annually, is available at https://euratex.eu/facts-and-key-figures/

There are several reasons behind the decline in employment that characterised the sector until 2015. The most significant factor seems to have been the liberalisation of international trade and increased global trade competition. This resulted in shifts in competitive advantages, with low-cost non-EU countries taking over markets formerly served by European companies. European industry responded by undertaking extensive subcontracting in lower-cost countries (Eurofound, 2016). The falling employment in textile manufacturing is related to the broader trend of a decline in manufacturing jobs in the EU. Manufacturing jobs – valued as well-paid blue-collar jobs – fell in the EU from 38 million to 32 million between 2000 and 2014 (Marschinski and Martinez Turegano, 2019). Employment losses have been most severe in low-tech subsectors such as textiles, clothing and leather. This contrasts with predominantly high-tech manufacturing sectors, such as motor vehicles and pharmaceuticals, which recovered the employment losses experienced at the onset of the 2007–2008 financial crisis, even showing marginal gains over the period 2008–2016 (Eurofound, 2016).

However, as mentioned earlier, the recent recovery in the competitiveness of the textile and clothing industry and the shift from mass production towards high added-value products has led to the stabilisation of employment in the sector. This shift has been accompanied by a change in the size and composition of the workforce, with high-skilled workers in greater demand. The European Skills Council – Textile Clothing Leather Footwear (ECS-TCLF) indicates that 300,000 craft jobs in the sector will disappear by 2025, as will some 100,000 plant and machine operator jobs. Growth is anticipated in technician and associate professional occupations, as well as in professional occupations (ESC-TCLF, 2014).

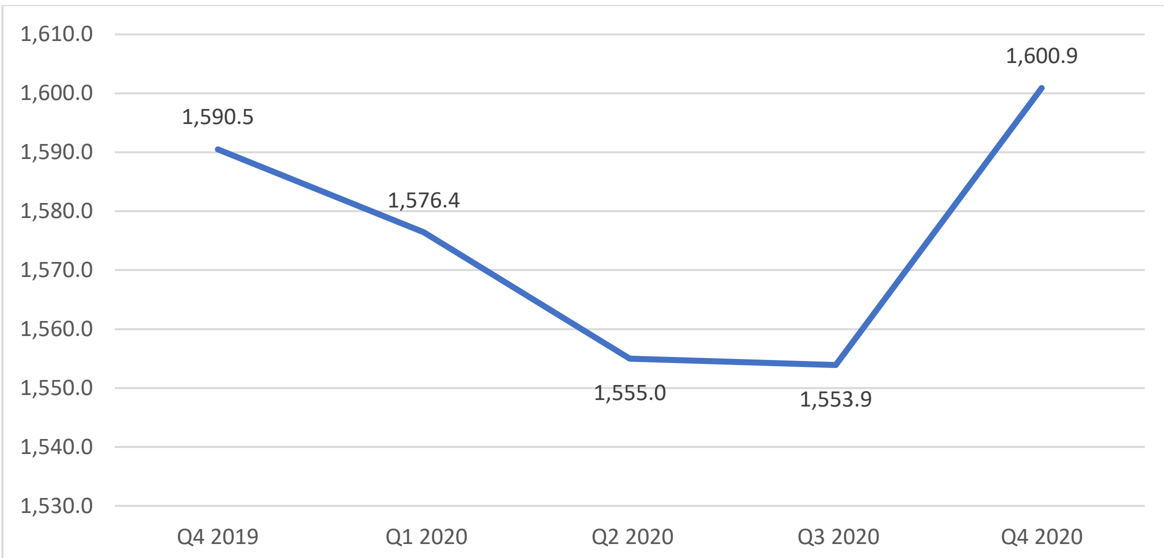
Another reason for falling employment in clothing and textiles is offshoring. According to some estimates, offshoring strategies resulted in the loss of 11,525 jobs in the sector between 2003 and 2016. However, detailed data analysis shows that most of the job losses due to offshoring occurred before 2010; only 12% (1,443 jobs) of the total job loss occurred between 2010 and 2016 (Eurofound, 2016). There is also evidence of a shift in the locus of offshoring from western to eastern Europe. While the EU13 (Member States that have joined the EU since 2004) were a major destination for offshored jobs within the EU –primarily from the higher-GDP, pre-2004 Member States (the EU15) – offshoring has become an increasingly important dimension of restructuring in the newer Member States themselves: 41% of the jobs lost to offshoring between 2010 and 2016 were in the EU13 (Eurofound, 2016). The conclusion is that offshoring activity appears to have fallen off sharply in the sector despite overall employment levels declining significantly (a reduction of 31% between 2008 and 2016 in the EU28). Therefore, the falling employment in the sector until 2015 appears to have been largely unrelated to offshoring.

The positive trend in employment was interrupted by the COVID-19 crisis (for further information, see Table 47 in Annex 1). According to Eurostat, the sector lost nearly 40,000 jobs at EU27 level between the fourth quarter of 2019 and the third quarter of 2020 (Figure 7). The loss of jobs was only in NACE 14. Possible explanations for the decline in NACE 14 are changes in consumer patterns due to COVID-19, the negative effects of the crisis on the apparel retail market and the seasonal character of the fashion business. In contrast, employment in NACE 13 increased during the COVID-19 crisis. This increase can be explained by two factors: the shortage in the supply of face masks, the fabrication of which involves layers of non-woven fabric and textile that are then assembled through ultrasonic welding (OECD, 2020), and the resilience of the EU labour market because of employment-related measures at national and regional levels. The fabrication of face masks is likely to have stimulated demand for non-woven textiles, which are produced by companies active in NACE 13.9 (manufacture of other textiles).

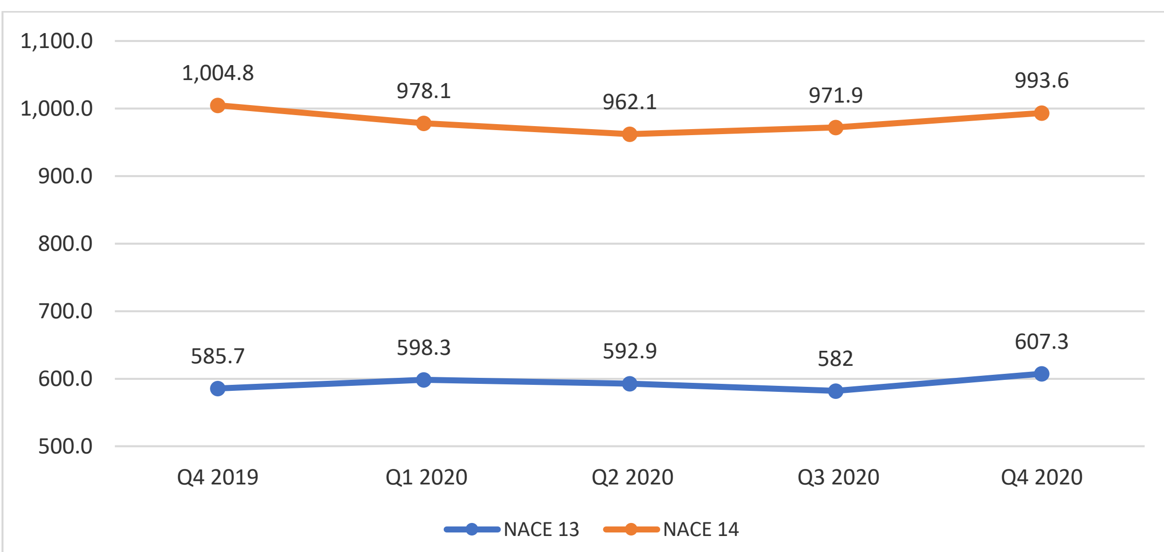
The relaxation of restrictions put in place to slow the infection rate in EU countries and the gradual lifting of lockdowns in most EU countries from the second quarter of 2020 stopped the decline in sectoral employment. In the fourth quarter of 2020, overall employment in the sector was similar to and even slightly higher than in the fourth quarter of 2019.

Figure 7: Number of employees in the textile and clothing sector, EU27, Q4 2019–Q4/2020 (thousands)

A. Entire textile and clothing sector



B. Textile subsector and clothing subsector



Source: *Eurostat, EU-LFS, 2020*

1.2. Companies in the textile and clothing sector and their economic development

Companies in the textile and clothing sector belong to one of the most important global industries in Europe. In the past decade, the companies in the sector have undergone substantial transformations that have changed the profile of the industry. In response to intensifying global competition, many companies have opted for market specialisation and investment in new technologies, intensified market access and internationalisation (Fibre2Fashion, 2008a). Although the European industry is mostly associated with the fashion sector, production also includes technical textiles and woven fabrics, with exports outside the EU27 increasing year on year (Fashion Revolution, 2014).

The sector is dominated by small and medium-sized enterprises (SMEs) in all Member States. In some countries these are often microenterprises or single-person companies (see Table 48 in Annex 1). In the Netherlands and Portugal, single-person companies and/or natural persons (sole proprietorships) make up over 50% of the sector's companies. Large companies are often multinationals or owned by foreign capital, especially in central and eastern Europe. Small family-owned companies are also present in some cases (for example, in Hungary).

Private ownership of textile companies is prevalent, although in some central and eastern European Member States there are former state factories that have been privatised. Cooperatives exist in the sector but are rare.

Textile and clothing companies are spread unevenly across the EU. Table 9 shows the number of enterprises in each Member State and the distribution of companies in terms of size. The country with the most companies is Italy, followed by Poland, Czechia, Spain and France. Together, the five countries account for 60% of all companies at EU level, with Italy alone accounting for 24%.

All these countries, except Czechia, are among the top producers of textile products in the EU. In 2016, Italy produced 45% of all clothes made in the EU; Spain was the second largest and France the third largest Member State in terms of total textile and clothing sector turnover (Euractiv, 2016). There is only a partial overlap between the countries with the most companies and those with the most employees; for instance, Romania accounts for 11% and Bulgaria for 6.8% of the total sectoral workforce in the EU, but they have only 3.7% and 2.9% respectively of the total number of companies in the EU.

Six countries have fewer than 1,000 companies in total: Cyprus, Denmark, Estonia Ireland, Luxembourg and Malta. The number of companies does not necessarily correlate with the economic importance of the sector. In some of these countries, such as Cyprus, textile and clothing was a booming sector in the 1970s and 1980s, but in the 1990s clothing producers began to lose market share to much cheaper apparel from Chinese producers. The sector in Cyprus underwent radical restructuring, with hundreds of enterprises closing. In other countries, such as Denmark, the textile and clothing sector plays an important economic role, being the fourth largest export business (Fibre2Fashion, 2008b).

Ten countries have between 1,000 and 5,000 companies (Austria, Belgium, Croatia, Finland, Hungary, Latvia, Lithuania, the Netherlands, Slovenia, Sweden). In some of these countries, the sector is on the rise, and the number of companies has increased since 2011; this is the case in the Latvia, Lithuania and the Nertherlands. In Lithuania, for example, textile and clothing is a steadily growing industrial sector, accounting for 4.5% of total industrial production sold in 2018 (Statistics Lithuania, 2019).

Another five countries are home to between 5,001 and 10,000 companies (Bulgaria, Germany, Greece, Romania, Slovakia). Some of these countries –Bulgaria, Germany and Romania– are among those with the highest shares of employment at EU level; for Romania and Bulgaria, textile and clothing products are also among their primary industrial exports.

Only three countries have between 10,001 and 15,000 companies (France, Portugal, Spain) and three have more than 15,000 companies (Czechia, Italy, Poland). Apart from Czechia, all these countries are important competitors on the European and global markets.

Table 9: Number of textile and clothing companies and distribution by size, EU27, 2017

MS	Total number of companies	Share of companies employing 0 to 9 people (%)	Share of companies employing 10 to 19 people (%)	Share of companies employing 20 to 49 people (%)	Share of companies employing 50 to 249 people (%)	Share of companies employing 250 people or more (%)	Average number of people employed per company
AT	1,251	85	5	6	4	0.2	11
BE	1,949	86	6	3	3	0.5	9
BG	5,086	70	10	11	8	0.9	20
CY	267	94	2	1	0	0.0	4
CZ	15,237	96	2	2	1	0.2	7
DE	6,268	75	10	7	7	1.0	19
DK	656	84	7	6	3	0.3	8
EE	841	79	7	8	4	0.7	13
EL	5,403	93	4	2	0	0.0	4
ES	14,841	88	6	4	1	0.1	6
FI	1,553	94	3	2	1	0.1	4
FR	14,770	95	2	2	1	0.2	6
HR	1,292	82	5	7	4	1.0	13
HU	4,156	89	4	4	2	0.4	9
IE	827	91	3	3	1	0.0	4
IT	42,724	83	11	4	1	0.2	8
LT	3,984	90	3	4	3	0.5	8
LU	29	83	3	0	10	3.4	n.d.
LV	1,908	90	4	3	3	0.1	6

MT	46	91	0	0	0	0.0	n.d.
NL	4,698	96	2	1	1	0.1	3
PL	18,270	90	4	4	2	0.3	8
PT	12,330	78	9	8	4	0.4	12
RO	6,440	68	10	12	9	2.2	25
SE	4,056	98	1	1	1	0.0	2
SI	1,068	92	4	2	2	0.3	7
SK	5,146	95	1	1	1	0.2	5
EU27	**175,096**	**86**	**6**	**4**	**2**	**3.0**	**9**

Note: *n.d., no data.*

Source: *Eurostat, Structural Business Statistics, 2017*

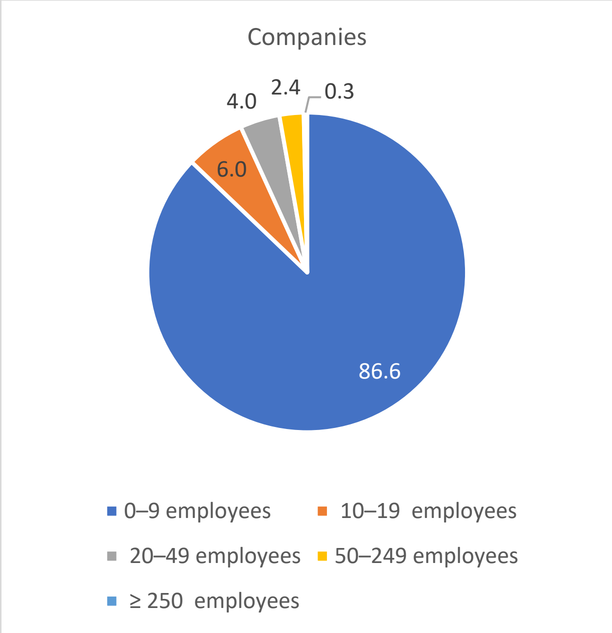
The sector is characterised by the prevalence of small companies employing fewer than 10 people (microenterprises). Nearly 87% of EU27 companies employ between 0 and 9 people (Figure 8). This indicates a marginal increase in the share of small companies since 2011, when they accounted for only 84%, according to Eurostat data. In total, microenterprises employ 21% of the sector's workforce.

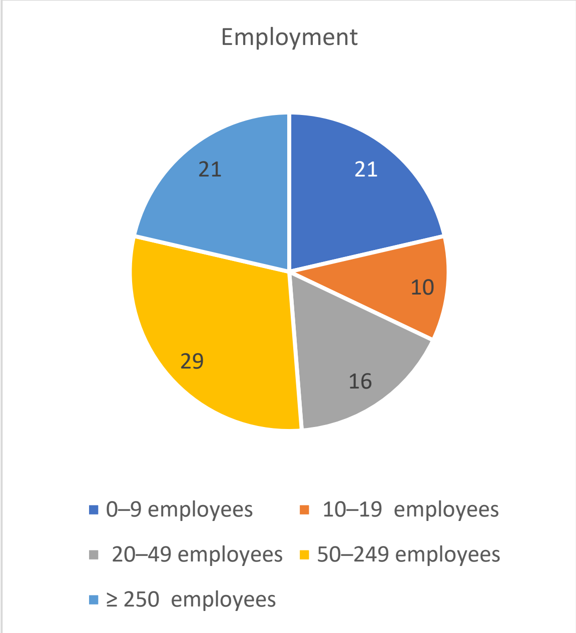
Data show that in 16 Member States the share of companies with fewer than 10 employees is above the EU27 average (see Table 9). Of these, the share of small enterprises exceeds 90% in 11. Accordingly, in 11 Member States the share of small companies is lower than the EU average. Among this group, only in Bulgaria and Romania is the share of microenterprises 70% or lower; in another four countries (Germany, Greece, Portugal) it is below 80%.

Large companies (over 250 employees) account for less than 1% of the total number of companies at EU27 level, but they employ 21% of the sectoral workforce. Luxembourg has the highest share of large companies (3.4%), followed by Romania (2.2%), Croatia and Germany (both 1%). In all the other countries, the share of large companies is under 1%.

The largest share of employees (30%) is concentrated in companies with 50 to 249 workers, which account for only 2.4% of all companies at EU level. While small companies are thus the most significant in absolute numbers, large and very large companies are very important to sectoral employment.

Figure 8: Shares of companies and shares of employment by company size category, EU27, 2017 (%)

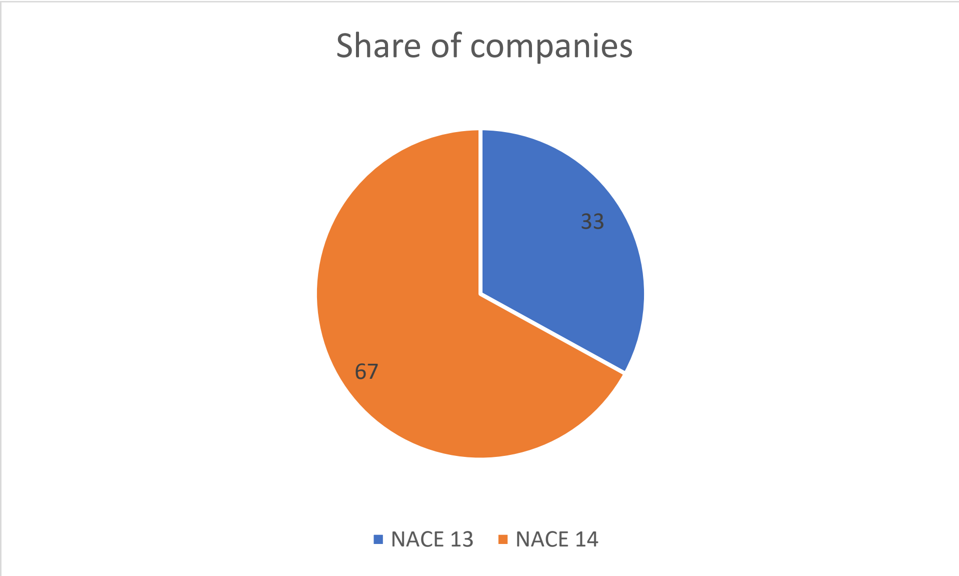




Source: *Eurostat, Structural Business Statistics, 2017*

As Figure 9 shows, most companies at EU27 level are concentrated in manufacture of wearing apparel (65%), with only 31% in manufacture of textiles. This distribution aligns with the shares of employment in the two subsectors: manufacture of wearing apparel accounts for 59% of sectoral employment (see Figure 2).

Figure 9: Shares of companies in NACE 13 and NACE 14, EU27, 2017 (%)



Source: *Eurostat, Structural Business Statistics, 2017*

Table 10: Companies and employees by company size, EU27, 2017

	Total number of enterprises	Number of enterprises per enterprise size class				
		0–9	*10–19*	*20–49*	*50–249*	*≥ 250+*
NACE 13	56,314	47,641	3,916	2,642	1,793	252
NACE 14	118,782	103,979	7,176	4,797	2,407	352
Total	175,096	151,620	11,092	7,439	4,200	604
%	100	86.6	6.3	2	2.4	0.3
	Total sectoral workforce	**Share of persons employed per enterprise size class**				
		0–9	*10 to 19*	*20–49*	*50–249*	*≥ 250*
NACE 13	558,357	101,756	55,110	87,652	184,702	125,260
NACE 14	895,826	205,195	98,532	150,305	246,508	190,757
Total	1,454,183	306,951	151,191	235,012	424,988	310,193
%	100	21.5	10.6	16.5	29.8	21.7

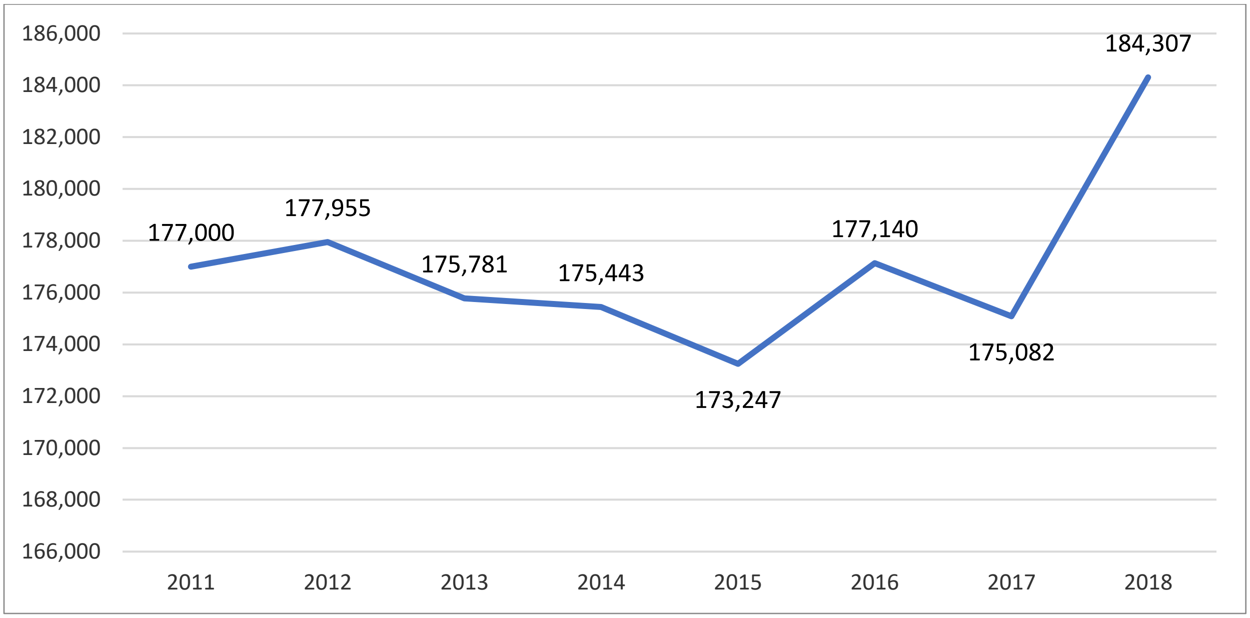
Note: *For NACE 14, figures for employment in companies employing 0–9 people are from 2016.*

Source: *Eurostat, Structural Business Statistics, 2017*

Small companies, with 0–9 and 10–19 employees account for over 90% of the sectoral companies (92.9%) as shown in the Table 10. However, they concentrate only one third of the sectoral workforce (32.1%). On the other hand, large (50–249) and very large companies (over 250 employees) represent less than 3% of the sectoral companies (2.7%), but are employing half of the sectoral labor force (51.5%).

As with sectoral employment, the decline in the number of companies stopped after 2015 (Figure 10). While employment only stabilised after that date, with the curve flattening, the number of companies in the sector saw a small increase between 2015 and 2018. Data on the impact of COVID-19 on companies are not yet available, but there is a risk that the crisis may have reversed the positive trend.

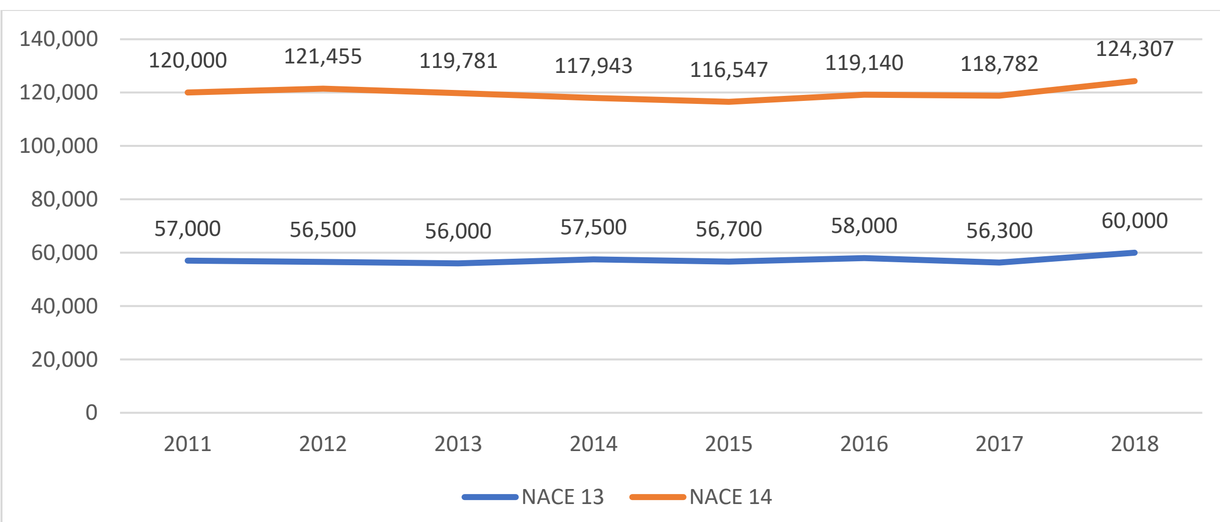
Figure 10: Number of companies in the textile and clothing sector, EU27, 2011–2018



Source: *Eurostat, Structural Business Statistics, 2018*

Data on companies by NACE code show that the decrease in the number of companies to 2015 was slightly more pronounced in the manufacture of apparel subsector (Figure 11). However, in 2018 the number of companies in manufacture of apparel saw a sudden increase, exceeding the 2011 level. A similar, and indeed even stronger, relative increase in 2018 can be observed in the manufacture of textiles subsector.

Figure 11: Numbers of companies in NACE 13 and NACE 14, EU27, 2011–2018

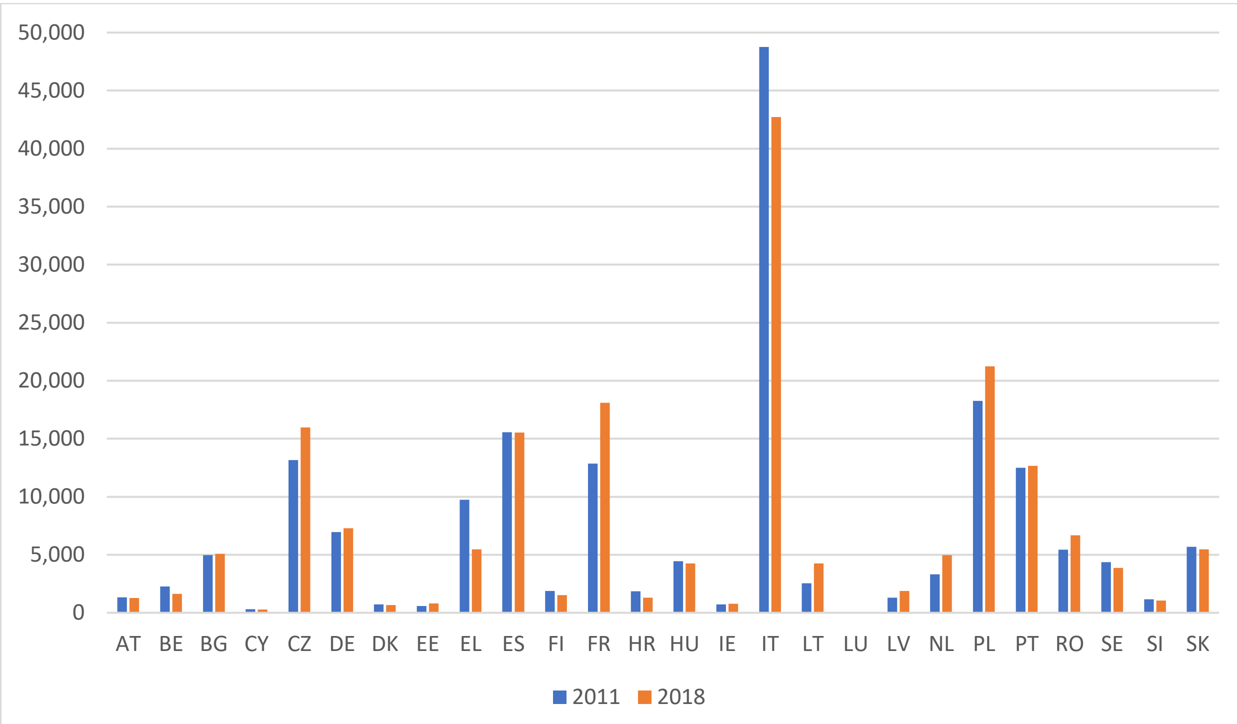


Source: *Eurostat, Structural Business Statistics, 2018*

The slightly different trends in NACE 13 and NACE 14 are a result of the different economic dynamics that characterise the subsectors. While the gross operating surplus in manufacture of textiles in the EU27 increased between 2018 and 2011 (from €6,000 million to €7,113 million, according to Eurostat), it fell in manufacture of wearing apparel during the same period (from €6, 092million in 2011 to €5, 748, million in 2018). In addition, investment in the manufacture of textiles was higher than that in manufacture of clothing over the period 2009–2018; in 2018, €3.2 billion was invested in NACE 13 while €1.4 billion, approximately half that amount, was invested in NACE 14 (Statista, 2022a).

In a competitive global market, European companies' biggest competitive advantage is research and innovation. Because of their unique performance and durability, technical textiles are replacing traditional basic materials and technologies in areas such as construction, transport and health, with significant potential for long-term growth.

Figure 12: Numbers of textile and clothing companies in the Member States, EU27, 2011–2018



Source: *Eurostat, Structural Business Statistics, 2018*

Note*: No data for Malta*

2. National level of interest representation

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 organisation, while eighteen have two or more, and only two countries have five or more trade unions (Spain and France).

In total, there are 52 employer organisations in 24 Member States in the textile and clothing sector. In three Member States – Cyprus, Luxembourg, and Slovakia – there is no sector-related employer organisation. While in Cyprus and Luxembourg the sector is very small, in Slovakia employment in textile and clothing 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 have two or more employer organisations. Of the last group, only two (Italy and Portugal) have five or more employer organisations.

Table 11: Numbers of sector-related trade unions and employer organisations per Member State

Trade unions	Member State	Employer organisations
2	**AT**	2
4	**BE**	2
2	**BG**	3
2	**CY**	0
1	**CZ**	1
1	**DE**	1
3	**DK**	2
1	**EE**	2
2	**EL**	3
5	**ES**	3
2	**FI**	1
7	**FR**	4
1	**HR**	2
4	**HU**	1
1	**IE**	1
4	**IT**	6
2	**LT**	1
2	**LU**	0
1	**LV**	1
1	**MT**	1

							3	**NL**	1							
							2	**PL**	4							
							3	**PT**	5							
							4	**RO**	2[6]							
							4	**SE**	1							
							1	**SI**	2							
							1	**SK**	0							
							66	**EU27**	**52**							

Source: *Network of Eurofound Correspondents, 2020*

Table 12 provides a detailed breakdown of the numbers of trade unions and employer organisations in the textile and clothing sector by NACE code (NACE 13 and NACE 14). The majority of trade unions (73%) and employer organisations (62%) have members in both textile and clothing. Both parts of the sector are covered by a trade union in all countries except Cyprus. In Cyprus, only NACE 14 has trade union representation, despite 60% of sectoral employment being in NACE 13 (see Figure 2).

The share of trade unions with only NACE 13 members is slightly lower than that of trade unions operating in NACE 14 only (5% and 8% respectively). Countries in which there is at least one trade union that covers only NACE 13 are Belgium Greece, Hungary, Romania and Spain and Belgium. With the exception of Spain (51%), all these countries have less than 50% of sectoral employment in NACE 13 and are below the EU average for employment in the subsector (41%; see Figure 2).

Member States in which there is at least one trade union that covers only NACE 14 are Cyprus, France, Hungary, Romania and Spain. While in France, Hungary and Romania NACE 14 accounts for a significant share of employment in the sector (over 50%), in Cyprus and Spain the share of NACE 14 in total employment in the subsector is below 50%. In each of these countries the number of trade unions is higher than two, reaching seven in France and four in Hungary and Romania and five in Spain. These findings suggest that the exclusive coverage of one subsectors by some trade unions could be linked to a tendency towards fragmentation and not to the size of the subsector at national level.

In countries that have employer organisations, they generally cover both subsectors. While in most countries there is at least one employer organisation that covers both subsectors, in Bulgaria and France all of the organisations cover only one part of the sector (either NACE 13 or NACE 14). The shares of employer organisations with NACE 13 members only and NACE 14 members only are similar (12% and 13% respectively).

Employer organisations covering only NACE 13 exist in Belgium, France, Greece, Portugal and Spain. Employer organisations covering only NACE 14 exist in Belgium, Denmark, Estonia, France and Greece. In

[6] In Romania the regional sectoral organization AstricoNE is affiliated to the national sectoral organisation Fepaius; in order to avoid double counting of members, AstricoNE was not counted here as a separate employer organisation. At the time of data collection for this report, AstricoNE was the only sectoral organisation affiliated at European level in Romania and this is reflected further in the report

Belgium and France there is a 'division of labour', with one employer organisation covering only NACE 13 and one or more covering only NACE 14. France, Portugal, Greece and Spain are characterised by a high number of employer organisations (and trade unions) and a tendency towards fragmentation.

Table 12: Numbers of organisations representing the entire sector, NACE 13 only and NACE 14 only

MS	Trade unions					Employer organisations				
	Only 13	Both	Only 14	Unknown	All TUs	Only 13	Both	Only 14	Unknown	All EOs
AT		2			2		2			2
BE	1	3			4	1		1		2
BG		1		1	2		1		2	3
CY			2		2	0	0	0		0
CZ		1			1		1			1
DE		1			1		1			1
DK		3			3		1	1		2
EE		1			1		1	1		2
EL	1	1			2	1	1	1		3
ES	1	2	1	1	5	1	2			3
FI		2			2		1			1
FR		6	1		7	1		3		4
HR		1			1		2			2
HU	1	1	2		4		1			1
IE		1			1		1			1
IT		4			4		6			6
LT		2			2		1			1
LU				2	2	0	0	0		0
LV		1			1		1			1
MT		1			1		1			1
NL		2		1	3		1			1
PL		2			2		1		3	4
PT		3			3	2	2		1	5
RO	1	1	2		4		1		1	2
SE		4			4		1			1
SI		1			1		2			2
SK		1			1	0	0	0		0

EU27 total	5	48	8	5	66	6	32	7	7	52
EU27 %	8	73	12	8	100	12	62	13	13	100

Note: *EO, employer organisation; TU, trade union.*

Source: *Network of Eurofound Correspondents, 2020*

2.1. Coverage, sector-relatedness and organisational density of trade unions in the sector

Table 13 provides an overview of the membership domains of trade unions in the textile and clothing sector at EU27 level. Trade union coverage of NACE 14 is greater than that of NACE 13; as discussed in Chapter 1, employment at EU level is higher in NACE 14 than in NACE 13.

Trade union representation within NACE 13 is balanced: the lowest share of trade union representation for any NACE subcode is 65% and the highest is 79%. Each NACE subcode is covered by trade unions in at least 20 Member States and at most 23 Member States.F In NACE 13, the highest trade union coverage is in NACE 13.9, both in terms of number and share of trade unions covering that part of the sector and in terms of number and share of Member States with at least one trade union covering it. A possible explanation for this is that the numbers of enterprises and employees are higher in NACE 13.9 than in NACE 13.1, 13.2 or 13.3. According to Eurostat data (Structural Business Statistics), over 50% of employment and over 50% of companies in NACE 13 are concentrated in NACE 13.9.

In NACE 14, trade union representation is less homogeneous; the gap between the lowest and the highest shares for the NACE subcodes is wider than in NACE 13. In NACE 14, the lowest rate of trade union coverage is 55% (14.20) and the highest is 77% (14.13). Each NACE code is covered by trade unions in at least 16 Member States and at most 23 Member States. In NACE 14, the highest trade union coverage is in NACE 14.13, both in terms of number and share of trade unions covering that part of the sector and in terms of number and share of Member States with at least one trade union covering it. Data from the Network of Eurofound Correspondents indicates that approximately half of employment in NACE 14 is concentrated in NACE 14.13.

Table 13: Coverage of NACE subcodes by trade unions

	13.1	**13.2**	**13.3**	**13.9**	**NACE 13**	**14.11**	**14.12**	**14.13**	**14.14**	**14.19**	**14.2**	**14.3**	**NACE 14**
Number of TUs with NACE code	43	46	46	52	56	47	43	51	48	43	36	45	59
% of Tus with NACE code	65	70	70	79	79	71	65	77	73	65	55	68	89
Number of Member States (27)*with NACE code e by at least one TU	20	20	20	23	25	22	18	23	21	18	16	21	26

% of member states with NACE code e by at least one TU	74	74	74	85	93	81	67	85	78	67	59	78	96

Note: *The table shows the numbers and shares of trade unions covering the NACE subcodes and of Member States that have at least one trade union covering the NACE subcodes. TU, trade union.*

Source: *Authors' calculations, based on information from the Network of Eurofound Correspondents, 2020*

Table 14 examines trade union representation from a multidimensional perspective, looking at sectoral, subsectoral and territorial representation, types of worker represented, sector-relatedness and proportion of the sectoral workforce represented (membership density).

The average sectoral trade union in the EU27 covers 66% of the relevant NACE subcodes, implying that more than half of NACE activities are unionised. A high percentage of trade unions (47%) represent 100% of NACE activities, 18% represent between 50% and 99% of them and 29% represent less than 50%. Trade unions covering only one part of the sector (NACE 13 or NACE 14) tend to represent fewer domains. Of 19trade unions covering less than 50% of NACE subcodes, 11 represent only one part of the sector (NACE 13 or NACE 14). But covering both subsectors does not necessarily result in coverage of a greater percentage of subcodes. In the case of several trade unions, from Estonia, Ireland, Latvia, Malta, Poland and Romania, coverage of both parts of the sector goes hand in hand with a low percentage of NACE subcode coverage. It can be hypothesised that in some cases low coverage is explained by low employment in certain NACE subcodes, but Eurostat does not provide detailed data in this regard. Low coverage (under 20%) is encountered in Member States where the sector and sectoral employment are small, such as Cyprus and Malta, but also in some countries with large numbers of employees. This applies to Romania, where all four trade unions have a subcode coverage of under 30%, and Hungary, where two out of four trade unions have coverage of less than 20%. In many cases, low coverage is correlated with low union membership. For instance, of 10 trade unions with coverage below 20% for which we have data regarding their membership, 9[7] have a membership density of 1% or less.

Over two-thirds of the sector-related trade unions cover all types of workers. Around one-quarter of them represent only blue-collar or only white-collar workers. In some countries there is a 'division of labour' among unions based on the type of workers that they represent (Austria, Belgium, Finland, Greece, Sweden).

The data do not indicate any correlation between the type of workers represented by trade unions and other characteristics, such as sectoral coverage, width of domain membership or membership rate. The type of workers represented seems to be a characteristic of the trade unions in question, which have traditionally organised themselves to represent only white-collar or blue-collar workers.

The majority of the trade unions in the sector represent workers across the entire country. Only a handful of them 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 also exist in centralised states, such

[7] The GWU in Malta is the only exception.

as France, Hungary and Romania. In all cases, locally or regionally organised unions are smaller 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 represent other sectors. Two-thirds of the trade unions (67%) represent other sectors and both NACE codes in the sector (overlap), 21% represent other sectors but only part of the textile and clothing sector (sectional overlap), 3% represent both parts of the sector (convergence) and 2% represent only part of the sector (sectionalism). For 6% of the trade unions, no data in this regard are available.

Table 14: Trade union representation: sectoral, subsectoral, worker types, territorial, sector-relatedness and share of sectoral workforce

MS	Trade union	NACE 13 (textiles), NACE 14 (clothing) or both covered	Number and share of NACE subcodes covered	All types of workers covered?	Entire country covered?	Other sectors covered?	Sector-relatedness: congruence (C), overlap (O), sectionalism (S), sectional overlap (SO)	Share of the sectoral workforce covered (%)
AT	PRO-GE	Both	11 (100%)	No	Yes	Yes	O	22.5
	GPA	Both	11 (100%)	No	Yes	Yes	O	10.1
BE	ACV-CSC Metea	Both	11 (100%)	Yes	Yes	Yes	O	81.4
	ACLVB-CGSLB	Both	11 (100%)	Yes	Yes	Yes	O	n.d.
	ABVV-FGTB ACCG	Both	11 (100%)	Yes	Yes	Yes	O	n.d.
	ACV-CSC CNE	Only textiles	4 (36%)	No	No	Yes	SO	n.d.
BG	FNSOLP	Both	7 (64%)	Yes	Yes	Yes	O	3
	Podkrepa	Both	5 (45%)	No	No	Yes	So	0.93
CY	SEVETTYK-PEO	Only clothing	3 (27%)	Yes	Yes	Yes	SO	1.9
	OBIEK-SEK	Only clothing	1 (9%)	Yes	Yes	Yes	SO	1.1
CZ	OS TOK	Both	11 (100%)	Yes	Yes	Yes	O	6.7
DE	IG Metall	Both	11 (100%)	Yes	Yes	Yes	O	17.6
DK	3F	Both	10 (91%)	Yes	Yes	Yes	O	38.2
	HK	Both	11 (100%)	No	Yes	Yes	O	37.6
	TL	Both	11 (100%)	No	Yes	Yes	O	n.d.
EE	ETTAF	Both	3 (27%)	Yes	Yes	Yes	O	1.0
EL	OEKIDE	Both	11 (100%)	No	Yes	Yes	O	8.8
	PSPKM	Only textiles	1 (9%)	No	Yes	Yes	SO	0.0
ES	CCOO de Industria	Both	11 (100%)	Yes	Yes	Yes	O	24.7

MS	Trade union	NACE 13 (textiles), NACE 14 (clothing) or both covered	Number and share of NACE subcodes covered	All types of workers covered?	Entire country covered?	Other sectors covered?	Sector-relatedness: congruence (C), overlap (O), sectionalism (S), sectional overlap (SO)	Share of the sectoral workforce covered (%)
	UGT FICA	Both	11 (100%)	Yes	Yes	Yes	O	1.9
	ELA	Only textiles	2 (18%)	Yes	No	Yes	SO	0.2
	FI-USO	Only clothing	6 (55%)	Yes	Yes	Yes	SO	0.4
	CIG Industria	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
FI	Pro	Both	11 (100%)	No	Yes	Yes	O	24.6
	Finnish Industrial Union	Both	7 (64%)	No	Yes	Yes	O	59.4
FR	CMTE-CFTC	Both	11 (100%)	Yes	Yes	Yes	O	0.2
	CFE-CGC Chimie	Both	9 (82%)	Yes	Yes	Yes	O	0.6
	FO Fédéchimie	Both	8 (73%)	Yes	Yes	Yes	O	0.1
	FO Pharmacie	Only clothing	7 (64%)	Yes	Yes	Yes	SO	n.d.
	FS-CFDT	Both	11 (100%)	Yes	Yes	Yes	O	3.6
	CGT-THCB	Both	11 (100%)	Yes	Yes	Yes	O	3.6
	UNSA Textile	Both	6 (55%)	Yes	No	No	C	0.2
HR	Sindtokg	Both	10 (91%)	Yes	Yes	Yes	O	22.3
HU	BDSZ	Both	9 (82%)	Yes	Yes	Yes	O	4.0
	HVDSZ 2000	Only clothing	5 (45%)	Yes	Yes	Yes	SO	31.4
	MTSZSZ	Only clothing	1 (9%)	Yes	Yes	Yes	SO	0.2
	VSZSZ – Propex MSZ	Only textile	2 (18%)	No	No	No	S	0.1
IE	SIPTU	Both	3 (27%)	Yes	Yes	Yes	O	12.7
IT	FILCTEM	Both	11 (100%)	Yes	Yes	Yes	O	21.3
	FEMCA-CISL	Both	11 (100%)	Yes	Yes	Yes	O	12.5
	UILTEC-UIL	Both	11 (100%)	Yes	Yes	Yes	O	n.d
	UGL Chimici	Both	11 (100%)	Yes	Yes	Yes	O	n.d
LT	LLPPS	Both	7 (64%)	Yes	Yes	No	C	3.3

MS	Trade union	NACE 13 (textiles), NACE 14 (clothing) or both covered	Number and share of NACE subcodes covered	All types of workers covered?	Entire country covered?	Other sectors covered?	Sector-relatedness: congruence (C), overlap (O), sectionalism (S), sectional overlap (SO)	Share of the sectoral workforce covered (%)
	LPĮPS Solidarumas	Both	11 (100%)	Yes	Yes	Yes	O	3.2
LU	LCGB	n.d.	n.d.	Yes	Yes	Yes	n.d.	n.d.
	OGB-L	n.d.	n.d.	Yes	Yes	Yes	n.d.	n.d.
LV	LIA	Both	2 (18%)	Yes	Yes	Yes	O	0.8
MT	GWU	Both	2 (18%)	Yes	Yes	Yes	O	65.1
NL	FNV Procesindus trie	Both	11 (100%)	Yes	Yes	Yes	O	7.5
	CNV Vakmensen	Both	11 (100%)	Yes	Yes	Yes	O	n.d.
	De Unie	n.d.	n.d.	No	Yes	Yes	n.d.	n.d.
PL	FNSZZPL	Both	10 (91%)	Yes	Yes	Yes	O	2.3
	NSZZ Solidarność	Both	2 (18%)	Yes	Yes	Yes	SO	0.3
PT	Fesete	Both	11 (100%)	Yes	Yes	Yes	O	14.4
	SIMA	Both	11 (100%)	Yes	Yes	Yes	O	0.1
	Sindeq	Both	11 (100%)	Yes	Yes	Yes	O	0.9
RO	FNSIU Uniconf	Both	3 (27%)	Yes	Yes	No	C	1.6
	FNS Solidaritate a Metal	Only textile	1 (9%)	No	No	Yes	SO	0.1
	FSLR	Only clothing	2 (18%)	No	Yes	Yes	SO	0.2
	Confpeltex	Only clothing	1 (9%)	Yes	Yes	Yes	SO	0.3
SE	IF Metall	Both	11 (100%)	No	Yes	Yes	O	30.6
	Unionen	Both	10 (100%)	No	Yes	Yes	O	12.4
	Sveriges Ingenjörer	Both	11 (100%)	No	Yes	Yes	O	5.0
	Ledarna	Both	11 (100%)	No	Yes	Yes	O	3.0
SI	STUPIS	Both	11 (100%)	Yes	Yes	Yes	O	27.8

MS	Trade union	NACE 13 (textiles), NACE 14 (clothing) or both covered	Number and share of NACE subcodes covered	All types of workers covered?	Entire country covered?	Other sectors covered?	Sector-relatedness: congruence (C), overlap (O), sectionalism (S), sectional overlap (SO)	Share of the sectoral workforce covered (%)
SK	IOZ	Both	5 (45%)	Yes	Yes	Yes	O	4.4
EU27	**66**	**Both: 49 (74%) Only textiles: 5 (8%) Only clothing: 8 (12%)**	**Average number of sectors covered: 7 Average share: 66%**	**All workers: 47 (71%) Only one type of worker: 18 (27%)**	**Entire country: 59 (89%) Part of country: 6 (9%)**	**Other sectors: 61 (92%) No other sectors: 4 (6%)**	**Overlap: 44 (67%) Sectional overlap: 14 (21%) Convergence: 3 (5%) Sectionalism: 1 (2%) No data: 4 (6%)**	**Average density: 12%**

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Note: *Averages are calculated based on all trade union organisations, including those with no data; the trade union density was only calculated based on the number of trade unions for which data regarding density were available.*

Table 15 presents data on trade union density in the textile and clothing sector per trade union and per country, based on aggregated sectoral membership strength. However, it should be noted that the incompleteness of the available data means that it is difficult to compare relative membership strength among Member States.

Despite the incomplete data, the table shows that there are vast differences in membership rates among trade unions. Only three trade unions have a sectoral membership rate of over 50%: ACV-CSC Metea (Belgium), the Finnish Industrial Union and the GWU (Malta). While the first two are large unions, the GWU is a small organisation, with only 400 workers.

The membership rate is between 10% and 49% in around one-quarter of the trade unions. Most of the unions with a membership rate of over 10% are located in (older) western European Member States, often with a large sectoral workforce or known for generally high union density (Austria, Denmark, Finland, Germany, Ireland, Italy, Portugal, Spain, Sweden). They are encountered less often in (newer) central and eastern European Member States, but they do occur in Croatia, Hungary and Slovenia. In the case of Hungary and Slovenia, high union membership is associated with low union fragmentation (only one union per country).

Around one-third of the trade unions have a membership rate of between 1% and 9%. This is true of unions in central and eastern European Member States (Bulgaria, Czechia, Estonia, Hungary, Lithuania, Romania, Slovakia) and western European Member States with high union fragmentation (France, the Netherlands, Spain, Sweden). In a handful of cases, these trade unions are encountered in Member States where the economic relevance of the sector is small or very small (Cyprus, Greece).

One-quarter of the trade unions in the sector have a membership of less than 1%. Unions with very low membership are predominantly encountered in countries with high trade union fragmentation, both in western Europe (France, Portugal, Spain) and central and eastern Europe (Hungary, Romania). Several trade unions originating in central and eastern European Member States have low rates of membership despite low fragmentation.[8]

In conclusion, high union membership rates seem to be influenced by (1) trade union fragmentation in the countries in question and (2) geographical position (western versus central and eastern Member States). There seems to be little correlation between the union membership rates of trade unions and their other characteristics, such as sectoral and territorial coverage, subsectoral coverage or types of workers represented (see Table 14).

When it comes to total membership in the sector, data for 53 trade unions (of 66) indicate that the average EU27 trade union density in the sector is 12%. 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 are those that are known for their high union density (over 50%) – such as Belgium, Malta and the Nordic countries (Denmark, Finland, Sweden) – but also countries with average union density (around 30%) but where the unions traditionally play an important role and social dialogue is an important element of the industrial relations system, such as Austria and Italy. Furthermore, higher than average union density rates in the sector are also found in Member States with rather low union density more generally, such as Hungary.[9]

There is significant variation among countries with union density below the EU27 average. Twelve Member States have union density below 10%; of them, a subgroup of seven Member States have union density below 5%. All of these are central and eastern European countries, some of which are characterised by a large sectoral workforce (Bulgaria, Poland, Romania).

Overall, it seems that neither the prevalence of small companies nor trade union fragmentation affects trade union density in the sector and that there are other factors (sectoral and extra-sectoral) that impact trade union density and affect the trade unions' capacity to organise the sector. However, investigating these is beyond the means and the scope of this study.

[8] The unions in question are LIA (Latvia) and FNSZZPL and NSZZ Solidarność (both Poland).

[9] For more information, see the 'Actors and institutions' sections of the relevant Eurofound working life country profiles, available at https://www.eurofound.europa.eu/country'

Table 15: Trade union density by trade union and by Member State (number and %)

MS	Trade union	No. of members	Member-ship rate under 1%	Member-ship rate 1–9%	Member-ship rate 10–49%	Member-ship over 50%	MS	Member-ship 1–9%	Member-ship 10–49%	Member-ship over 50%	Above or below EU average rate	Number of trade unions with data
AT	PRO-GE	3,000			22.5		**AT**		33		↗	2 (all)
	GPA	1,350			10.1							
BE	ACV-CSC Metea	14,565				81.4	**BE**			81	↗	1 (out of 4)
	ACLVB-CGSLB	n.d.	n.d.	n.d.	n.d.	n.d.						
	ABVV-FGTB ACCG	n.d.	n.d.	n.d.	n.d.	n.d.						
	ACV-CSC CNE	n.d.	n.d.	n.d.	n.d.	n.d.						
BG	FNSOLP	3,000		3			**BG**	3			↘	2 (out of 2)
	Podkrepa	820	0.9									
CY	SEVETTYK-PEO	17		1.9			**CY**	3			↘	2 (all)
	OBIEK-SEK	10		1.1								
CZ	OS TOK	3,456		6.7			**CZ**	6.7			↘	1 (all)
DE	IG Metall	22,000			17.6		**DE**		17.6		↗	1 (all)
DK	3F	2,031			38.2		**DK**			75.8	↗	2 (out of 3)
	HK	2,000			37.6							
	TL	n.d.	n.d.	n.d.	n.d.	n.d.						
EE	ETTAF	94		1.0			**EE**	1.0			↘	1 (all)
EL	OEKIDE	2,000		8.8			**EL**	8.8			↘	1 (out of 2)
	PSPKM	n.d.	n.d.	n.d.	n.d.	n.d.						
ES	CCOO de Industria	22,000			24.7		**ES**		22.7		↗	4 (out of 5)

MS	Trade union	No. of members	Member-ship rate under 1%	Member-ship rate 1–9%	Member-ship rate 10–49%	Member-ship over 50%	MS	Member-ship 1–9%	Member-ship 10–49%	Member-ship over 50%	Above or below EU average rate	Number of trade unions with data
	UGT FICA	1,707		1.9								
	ELA	151	0.2									
	FI-USO	386	0.4									
	CIG Industria	n.d.	n.d.	n.d.	n.d.	n.d.						
FI	Pro	1,500			24.6		**FI**			84.0	↗	2 (all)
	Finnish Industrial Union	3,617				59.4						
FR	CMTE-CFTC	200	0.2				**FR**	8.5			↘	6 (out of 7)
	CFE-CGC Chimie	500	0.6									
	FO Fédéchimie	100	0.1									
	FO Pharmacie	n.d.	n.d.	n.d.	n.d.	n.d.						
	FS-CFDT	3,000		3.6								
	CGT-THCB	3,000		3.6								
	UNSA Textile	200	0.2									
HR	Sindtokg	4,000			22.3		**HR**		22.3		↗	1 (all)
HU	BDSZ	1,412		4.0			**HU**		35.9		↗	4 (all)
	HVDSZ 2000	11,000			32							
	MTSZSZ	80	0.2									
	VSZSZ – Propex MSZ	52	0.1									
IE	SIPTU	400			12.7		**IE**		12.7		↗	1 (all)

MS	Trade union	No. of members	Member-ship rate under 1%	Member-ship rate 1–9%	Member-ship rate 10–49%	Member-ship over 50%	MS	Member-ship 1–9%	Member-ship 10–49%	Member-ship over 50%	Above or below EU average rate	Number of trade unions with data
IT	FILCTEM	70,000			21.3		**IT**		33.8		↗	2 (out of 4)
	FEMCA-CISL	40,990			12.5							
	UILTEC-UIL	n.d.	n.d.	n.d.	n.d.	n.d.						
	UGL Chimici	n.d.	n.d.	n.d.	n.d.	n.d.						
LT	LLPPS	930		3.3			**LT**	6.5			↘	2 (all)
	LPĮPS Solidarumas	890		3.2								
LU	LCGB	161	n.d.	n.d.	n.d.	n.d.	**LU**	n.d.	n.d.	n.d.	n.d.	an.d.
	OGB-L	323	n.d.	n.d.	n.d.	n.d.						
LV	LIA	100	0.8				**LV**	0.8			↘	1 (all)
MT	GWU	300				65.1	**MT**			65.1	↗	1 (all)
NL	FNV Procesindustrie	1,200		7.5			**NL**	7.5			↘	1 (out of 3)
	CNV Vakmensen	n.d.	n.d.	n.d.	n.d.	n.d.						
	De Unie	n.d.	n.d.	n.d.	n.d.	n.d.						
PL	FNSZZPL	3,700		2.3			**PL**	2.6			↘	2 (all)
	NSZZ Solidarność	500	0.3									
PT	Fesete	20,000			14.4		**PT**		15.4		↗	3 (all)
	SIMA	200	0.1									
	Sindeq	1,250	0.9									
RO	FNSIU Uniconf	2,500		1.6			**RO**	2.2			↘	4 (all)

MS	Trade union	No. of members	Member-ship rate under 1%	Member-ship rate 1–9%	Member-ship rate 10–49%	Member-ship over 50%	MS	Member-ship 1–9%	Member-ship 10–49%	Member-ship over 50%	Above or below EU average rate	Number of trade unions with data
	FNS Solidaritatea Metal	160	0.1									
	FSLR	350	0.2									
	Confpeltex	500	0.3									
SE	IF Metall	2,000			30.6		**SE**			51.0	↗	4 (all)
	Unionen	808			12.4							
	Sveriges Ingenjörer	327		5.0								
	Ledarna	197		3.0								
SI	STUPIS	1,800			27.8		**SI**		27.8		↗	1 (all)
SK	IOZ	1,063		4.4			**SK**	4.4			↘	1 (all)
EU27	**Average density 12% (calculated for 53 trade unions with data)**											
	66 TUs		**15 TUs (23%)**	**18 TUs (27%)**	**16 TUs (24%)**	**3 TUs (5%)**	**EU27**	**12 MS (44%)**	**9 MS (33%)**	**5 MS (19%)**	**Below EU27 average: 12 MS (44%)** **Above EU27 average: 14 MS (52%). Data for LU missing**	**53 TUs (of 66)**

Note: *n.d., no data; TU, trade union. The pecentages have been calculated based on the overall number of trade union organisations in the sector.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

As seen at the beginning of this chapter, in several countries there is more than one sector-related trade union, which indicates union fragmentation. This table examines trade union fragmentation in the sector in the 27 Member States and explores the reasons for it.

Table 16 shows that in 18 countries (67%) the trade union landscape is marked by fragmentation. The most frequent reason for fragmentation is the difference in ideology (in 10 Member States (56%) of those countries with fragmentation). The second most frequent reason for fragmentation is that the trade unions organise different categories of workers (blue collar or white collar). This is the case in seven Member States, 39% of those with fragmentation. Other reasons are encountered very rarely, in one or two Member States only.

Table 16: Reasons for trade union fragmentation in the sector

MS	Reason for fragmentation					
	Unions organise different categories of workers	**Unions have members in different parts of the country**	**Unions have members in different types of companies (in terms of size or ownership)**	**Unions have members in different parts of the sector or types of activity**	**Unions have similar membership domains but differ in terms of ideology**	**Other**
AT	Yes					
BE	Yes	Yes			Yes	
BG		Yes			Yes	
CY					Yes	
CZ	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DK	Yes					
EE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EL					Yes	
ES			Yes		Yes	
FI	Yes					
FR	Yes				Yes	
HR	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU	Yes			Yes		
IE	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IT					Yes	
LT						They belong to different peak organisations
LU					Yes	
LV	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

MT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
NL					Yes	
PL					Yes	
PT				Yes	Yes	
RO						They belong to different peak organisations
SE	Yes					
SI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
SK	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EU27	**7 (39%)**	**2 (11%)**	**1 (6%)**	**2 (11%)**	**10 (56%)**	**2 (11%)**

Note: *n.a., not applicable (because there is only one trade union in the country in question). Percentages for the EU27 are based on all countries with trade union fragmentation.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

2.2. Involvement of trade unions in collective bargaining

Table 17 shows sector-related trade union involvement in collective bargaining, social dialogue (bipartite or tripartite) and consultation by the government on sector-related matters. The table shows whether the trade unions are involved in collective bargaining at company level (single-employer collective bargaining) or sectoral level (multi-employer collective bargaining) or both. The table also gives information on the proportion of the workforce covered by collective bargaining, based on estimates provided by members of the Network of Eurofound Correspondents.

Table 17 shows that 88% of sectoral unions (58 trade unions) conduct collective bargaining in the sector. In 14 Member States (Austria, Belgium, Bulgaria, Czechia, Denmark, Finland, France, Germany, Italy, the Netherlands, Portugal, Slovenia, Spain, Sweden), at least one trade union is involved in multi-employer collective bargaining. In nine of these countries (Belgium, Bulgaria, Czechia, Denmark, France, Italy, the Netherlands, Slovenia, Spain), trade unions combine single-employer and multi-employer bargaining. In total, 58% (38 trade unions) are involved in multi-employer collective bargaining. Of these, 14 (21% of the total of 66) are involved only in sector-level collective bargaining.

In 10 Member States (Croatia, Cyprus, Hungary, Ireland, Latvia, Luxembourg, Malta, Poland, Romania, Slovakia), trade unions are involved in collective bargaining only at company level.[10] In total, 30% of the organisations (20 trade unions) are involved in company-level collective bargaining only.

Multi-employer collective bargaining is prevalent in western European Member States, while company-level collective bargaining is dominant in central and eastern European Member States.

NACE 13 is covered by collective bargaining by 49 trade unions (74%) and NACE 14 by collective bargaining by 50 trade unions (76%).

[10] In France and Spain, one trade union in each country is involved in company-level collective bargaining only; in these countries, this is the exception and not the rule.

The average number of NACE subcodes covered in collective bargaining by trade unions in the textile and clothing sector is 6.7 A high level of sectoral collective bargaining coverage is predominantly seen among trade unions involved in multi-employer collective bargaining: the average number of NACE subcodes covered by trade unions involved in multi-employer collective bargaining is 8.3. The average number of NACE subcodes represented by the 20 trade unions involved in company-level collective bargaining is only 3.2. None of the 20 trade unions involved in single-employer collective bargaining only (in Croatia, Cyprus, France, Hungary, Ireland, Latvia, Luxembourg, Malta, Poland, Romania, Slovakia, Spain) represents all NACE codes in the sector.

In five countries (Estonia, Greece, Lithuania, Luxembourg, Spain), a total of eight trade unions do not conduct collective bargaining, for various reasons. In three of these countries (Estonia, Greece, Lithuania), no trade union included in this study is involved in collective bargaining. However, in Estonia and Lithuania, collective bargaining does take place at company level. In Estonia, trade unions affiliated to ETTAF are involved in collective bargaining at company level; in Lithuania, the sectoral trade unions are not directly involved in collective bargaining, but they offer support and consultation to their members that are.

More than half of the trade unions are involved in bipartite or tripartite social dialogue. In all Member States except Cyprus, Estonia, Greece, Ireland, Luxembourg and Malta at least one trade union is involved in social dialogue. There are no data for Portugal.

Over half of the trade unions are consulted by the government on sector-related matters. In all countries except Cyprus, Czechia, Greece, Ireland, Luxembourg and Malta at least one trade union is consulted by the government on sector-related matters.

Apart from four trade unions (OEKIDE and PSPKM in Greece, LCGB in Luxembourg and ELA in Spain), all 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.

Table 17: Involvement of sectoral trade union organisations in collective bargaining and social dialogue

MS	Trade union	CB at sector or company level or both	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	NACE 14 subcodes covered	Total CB coverage (%)	Involved in bipartite or	Consulted by the government on sector-related matters	Affiliation to IndustriAll Europe
AT	PRO-GE	Sector					4								7	100			
	GPA	Sector					4								7				
BE	ACV-CSC Metea	Both					4								7	90–100			
	ACLVB-CGSLB	Both					4								7				
	ABVV-FGTB ACCG	Both					4								7				
	ACV-CSC CNE	Both					4								0				
BG	FNSOLP	Both					3								4	70			
	Podkrepa	Both					4								5		n.d.	n.d.	
CY	SEVETTYK-PEO	Company					0								2	3			
	OBIEK-SEK	Company					0								1				
CZ	OS TOK	Both					4								7	60			
DE	IG Metall	Sector					4								7	80			
DK	3F	Both					4								6	75–80			
	HK	Both					4								7				
	TL	Sector					4								7				
EE	ETTAF	No CB					0								0	0.7			

MS	Trade union	CB at sector or company level or both	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	NACE 14 subcodes covered	Total CB coverage (%)	Involved in bipartite or	Consulted by the government on sector-related matters	Affiliation to IndustriAll Europe
EL	OEKIDE	No CB					0								0	0			
	PSPKM	No CB					0								0	0			
ES	CCOO de Industria	Both					4								7	100			
	UGT FICA	Both					4								7		n.d.		
	ELA	No CB					0								0				
	FI-USO	Company					0								6				
	CIG Industria	No CB					0								0		n.d.	n.d.	
FI	Pro	Sector					4								7	82			
	Finnish Industrial Union	Sector					4								7				
FR	CMTE-CFTC	Both					4								7	99			
	CFE-CGC Chimie	Both					4								5				
	FO Fédéchimie	Both					3								5				
	FO Pharmacie	Both					0								7				
	FS-CFDT	Both					4								7			n.d.	
	CGT-THCB	Both					4								7				
	UNSA Textile	Company					4								4				
HR	Sindtokg	Company					4								6	58			

MS	Trade union	CB at sector or company level or both	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	NACE 14 subcodes covered	Total CB coverage (%)	Involved in bipartite or	Consulted by the government on sector-related matters	Affiliation to IndustriAll Europe
HU	BDSZ	Company					4								5	50			
	HVDSZ 2000	Company					0								3				
	MTSZSZ	Company					0								1				
	VSZSZ – Propex MSZ	Company					2								0				
IE	SIPTU	Company					2								1	20			
IT	FILCTEM	Both					4								7	100			
	FEMCA-CISL	Both					4								7				
	UILTEC-UIL	Both					4								7				
	UGL Chimici	Sector*					4								7			n.d.	
LT	LLPPS	No CB					0								0	0			
	LPĮPS Solidarumas	No CB					0								0				
LU	LCGB	No CB					0								0	0			
	OGB-L	Company					1								0				
LV	LIA	Company					1								1	5			
MT	GWU	Company					1								1	63			
NL	FNV Procesindustrie	Both					4								7	100			

MS	Trade union	CB at sector or company level or both	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	NACE 14 subcodes covered	Total CB coverage (%)	Involved in bipartite or	Consulted by the government on sector-related matters	Affiliation to IndustriAll Europe
	CNV Vakmensen	Both					4								7				
	De Unie	Both					4								1				
PL	FNSZZPL	Company					1								0	0.2			
	NSZZ Solidarność	Company					1								0				
PT	Fesete	Sector					4								7	91	n.d.		
	SIMA	Sector					4								3		n.d.	n.d.	
	Sindeq	Sector					4								7		n.d.	n.d.	
RO	FNSIU Uniconf	Company					2								1	75			
	FNS Solidaritatea Metal	Company					1								0				
	FSLR	Company					0								2				
	Confpeltex	Company					0								1				
SE	IF Metall	Sector					4								7	90			
	Unionen	Sector					4								7				
	Sveriges Ingenjörer	Sector					4								7				
	Ledarna	Sector					4								7				
SI	STUPIS	Both					4								7	100			

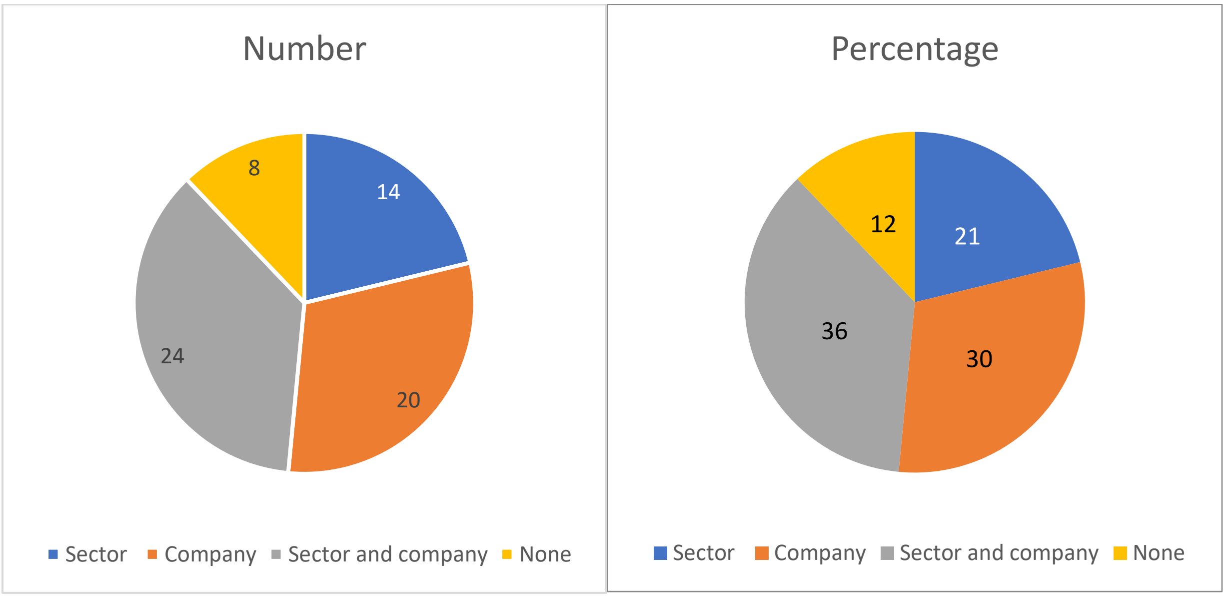
MS	Trade union	CB at sector or company level or both	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	NACE 14 subcodes covered	Total CB coverage (%)	Involved in bipartite or	Consulted by the government on sector-related matters	Affiliation to IndustriAll Europe
SK	IOZ	Company					2								3	18			
EU27	**66 TUs**	**58 TUs involved in CB**					**49 TUs**								**50 TUs**	**Average CB coverage 55%**	**39 TUs**	**35 TUs**	**50 TUs**

Note: *CB, collective bargaining; n.a., not applicable; n.d., no data; SD social dialogue, TU, trade union. * No information available about involvement at company level. The affiliation for the textile sector was indicated after the data collection stage was finalised and was not verified by Eurofound's national correspondent*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Figure 13 shows the involvement of trade unions in collective bargaining. The vast majority (58 trade unions, or 88% of the total) are involved in collective bargaining. Over one-third are involved in both single-employer (company-level) and multi-employer (sector-level) bargaining. Just over one-fifth (21%) are involved in multi-employer (sector) bargaining only, and nearly one-third (30%) are involved in single-employer bargaining only.

Figure 13: Involvement of sectoral trade unions in forms of collective bargaining



Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

2.3. Coverage, sector-relatedness and organisational density of employer organisations in the sector

Table 18 looks at the sectoral representation of employer organisations in the textile and clothing industry. It shows the number of employer organisations with members in each NACE subcode, as well as the number of Member States in which each NACE subcode is represented by at least one employer organisation. At EU27 level, employer organisation sectoral coverage is identical in NACE 13 and NACE 14; in 24 Member States, over three quarters of employer organisations represent companies in NACE 13 and over two-thirds represent companies in NACE 14

Employer organisation coverage within NACE 13 is balanced; the shares of employer organisations for all NACE subcodes are similar. The highest coverage is in NACE 13.2 and 13.9, both in terms of number and share of employer organisations representing these NACE subcodes and in terms of number and share of Member States with at least one employer organisation in these NACE subcodes. The NACE subcodes in the textile subsector are represented by an employer organisation in a minimum of 20 Member States and a maximum of 23 Member States.

In NACE 14, employer organisation representation is less balanced than in NACE 13; the lowest share of employer organisation representation is 60% (NACE 14.20) and the highest is 77% (NACE 14.13). The

NACE subcodes in the clothing subsector are represented by employer organisations in a minimum of 20 Member States and a maximum of 24 Member States.

Within NACE 14, the highest employer organisation coverage is in 14.13 (this is also the case for the trade unions; see Table 13), both in terms of number and share of employer organisations representing this NACE code and in terms of number and share of Member States with at least one employer organisation in this NACE code. Data from the Network of Eurofound Correspondents indicates that approximately half of employment in NACE 14 is concentrated in NACE 14.13.

Table 18: Coverage of NACE subcodes by employer organisations

	13.1	13.2	13.3	13.9	14.11	14.12	14.13	14.14	14.19	14.20	14.3	NACE 13	NACE 14
Number of EOs	35	36	34	36	33	35	40	38	38	31	35	40	40
Share of EOs (%)	67	69	65	69	63	67	77	73	73	60	67	77	77
Number of MS	22	23	20	22	20	22	24	23	22	20	22	24	24
Share of MS (%)	81	85	74	81	74	81	89	85	81	74	81	89	89

Note: *The table shows the numbers and shares of trade unions covering the NACE subcodes and of Member States that have at least one trade union covering the NACE subcodes. EO, employer organisation.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 19 examines employer organisation representation from a multidimensional point of view. It looks at sectoral, subsectoral and territorial representation, types of workers represented, sector-relatedness, proportion of the sectoral workforce represented (membership density) and proportion of companies represented (company density).

The table indicates that the average percentage of NACE subcodes covered by employer organisations in the EU27 is 77%, meaning that more than half of NACE activities are covered by sectoral employer organisations. This percentage is higher than the equivalent figure for trade unions (66%). Most of the employer organisations (40%) cover 100% of NACE subcodes, one-quarter have coverage of between 50% and 99%, and 21% come in below 50%. Employer organisations representing only part of the sector (only textiles or only clothing) tend to have a smaller membership domain percentage: 9 out of 12 employer organisations with a membership domain percentage of less than 50% covers only one of the two parts of the sector. In the case of some employer organisations, in France, Ireland, Malta and Spain, coverage of both parts of the sector goes hand in hand with a low percentage of NACE subcode coverage.

Although in the case of the trade unions there is a correlation between a lower percentage of NACE subcode coverage and low membership, in the case of employer organisations there is no clear correlation. Five employer organisations with coverage of less than 50% (in Estonia, France and

Portugal) have a membership of 5% or less of the sectoral workforce. But two others (in Malta and Spain) have a relatively high membership rate (21% and 62%, respectively).[11]

Most employer organisations represent all types of companies. Only one-tenth of the sector-related employer organisations represent only one type of company; most of these serve only small companies, according to the information provided by the national correspondents. In some countries, such as Austria, there is a clear ‘division of labour’ between the two sectoral employer organisations: BIMBT represents only small companies, while FVTBSL serves only large companies. In other countries, there is no such clear division; employer organisations covering all types of companies coexist with those covering only one type, usually smaller companies (Denmark, France, Italy). In addition, in some countries, such as Italy, while an employer organisation’s structure allows it to represent all types of companies, most of its members are small enterprises.

The data do not suggest any correlation between extensive coverage (for example, of all types of companies) and the share of companies or the share of the sectoral workforce covered. On the one hand, there are employer organisations covering only one type of company but with considerable membership (in terms of sectoral workforce and/or sectoral companies). This is the case in Austria, where two employer organisations each representing one type of company (BIMBT serves small companies and FVTBSL serves large companies) have significant memberships in terms of workforce and companies. This is also the case in Denmark, where member companies of the Tailors’ Guild cover 15% of the sectoral workforce, and Spain, where AEGP’s membership accounts for 21% of the sectoral workforce. On the other hand, in France the membership of UNACAC covers only 0.05% of the sectoral workforce and 1% of the sectoral companies.

The vast majority of employer organisations serve the entire country. Only one employer organisation is organised at local level, in France. This differs from the trade unions, slightly more of which are locally or regionally organised.

More than half of employer organisations represent other sectors, a lower percentage than the equivalent figure for the trade unions, among which multisectoralism is much more widespread. In addition, Table 19 shows that half of employer organisations represent other sectors and both NACE codes of the sector (overlap); 6% represent other sectors but only one part of the sector, NACE 13 or NACE 14 (sectional overlap); and 30% represent only the textile and clothing sector and no other sectors – three times more than is the case for the trade unions. Of these, 15% serve both parts of the sector (congruence) and 15% only one part of the sector (sectionalism).

[11] For Belgium, data on membership are not comparable; for Greece and Ireland, there are no data regarding membership.

Table 19: Employer organisation representation: sectoral, subsectoral, worker types, territorial, sector-relatedness, share of sectoral workforce and share of all companies

MS	Employer organisation	NACE 13 (textiles), NACE 14 (clothing) or both covered	Number and share of NACE subcodes covered	All types of companies covered?	Entire country covered?	Other sectors covered?	Sector-relatedness: congruence (C), overlap (O), sectionalism (S), sectional overlap (SO)	Share of the sectoral workforce covered (%)	Share of all companies covered (%)
AT	BIMBT	Both	10 (91%)	No	Yes	Yes	O	25	72
	FVTBSL	Both	11 (100%)	No	Yes	Yes	O	75	26
BE	Creamoda	Only textiles	4 (36%)	Yes	Yes	No	S	62	8
	Fedustria	Only clothing	7 (64%)	Yes	Yes	No	S	145	13
BG	BAATPE	Both	7 (64%)	Yes	Yes	Yes	O	25	2
	BATOK	Both	10 (91%)	Yes	Yes	Yes	O	20	1
	BOTO	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	6	1
CY	None	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	ATOK	Both	11 (100%)	Yes	Yes	Yes	O	19	0.2
DE	textil+mode	Both	11 (100%)	Yes	Yes	Yes	O	91	22
DK	DM&T	Both	11 (100%)	Yes	Yes	No	C	85	11
	Tailors' Guild	Only clothing	7 (64%)	No	Yes	No	S	15	5
EE	ERTL	Both	9 (82%)	Yes	Yes	Yes	O	n.d.	4
	EKL	Only clothing	2 (18%)	Yes	Yes	Yes	SO	0.3	0.5
EL	SEPEE	Both	11 (100%)	Yes	Yes	No	C	44	5
	SEVK	Only textiles	5 (45%)	Yes	Yes	No	S	n.d.	2
	SKEE	Only clothing	6 (55%)	Yes	Yes	No	S	15	3
ES	CIE	Both	11 (100%)	Yes	Yes	Yes	O	46	29

MS	Employer organisation	NACE 13 (textiles), NACE 14 (clothing) or both covered	Number and share of NACE subcodes covered	All types of companies covered?	Entire country covered?	Other sectors covered?	Sector-relatedness: congruence (C), overlap (O), sectionalism (S), sectional overlap (SO)	Share of the sectoral workforce covered (%)	Share of all companies covered (%)
	Fedecon	Both	7 (64%)	Yes	Yes	No	C	32	15
	AEGP	Only textiles	4 (36%)	No	Yes	No	S	21	1
FI	Suomen Tekstiili & Muoti	Both	11 (100%)	Yes	Yes	Yes	O	90	12
FR	UIT	Both	7 (64%)	Yes	Yes	Yes	O	23	2
	UFIMH	Only textiles	4 (36%)	Yes	Yes	Yes	SO	5	1
	FHCM	Only textiles	5 (45%)	Yes	No	Yes	SO	n.d.	0
	UNACAC	Both	5 (45%)	No	Yes	No	C	0.05	1
HR	HUP UTKI	Both	9 (82%)	Yes	Yes	Yes	O	70	35
	HGK UTOI	Both	10 (91%)	Yes	Yes	No	C	100	100
HU	MKSZ	Both	11 (100%)	Yes	Yes	Yes	O	25	1
IE	IBEC	Both	3 (27%)	Yes	Yes	Yes	O	n.d.	n.d.
IT	SMI	Both	11 (100%)	Yes	Yes	No	C	50	n.d.
	Confartigianato Moda	Both	11 (100%)	No	Yes	Yes	O	n.d.	18
	CNA Federmoda	Both	11 (100%)	Yes	Yes	Yes	O	15	n.d.
	Casartigiani	Both	11 (100%)	Yes	Yes	Yes	O	n.d.	n.d.
	CLAAI	Both	11 (100%)	Yes	Yes	Yes	O	n.d.	n.d.
	Uniontessile Confapi	Both	11 (100%)	Yes	Yes	Yes	O	n.d.	n.d.
LT	LATIA	Both	11 (100%)	Yes	Yes	Yes	O	n.d.	2

MS	Employer organisation	NACE 13 (textiles), NACE 14 (clothing) or both covered	Number and share of NACE subcodes covered	All types of companies covered?	Entire country covered?	Other sectors covered?	Sector-relatedness: congruence (C), overlap (O), sectionalism (S), sectional overlap (SO)	Share of the sectoral workforce covered (%)	Share of all companies covered (%)
LU	None	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LV	VRUA	Both	11 (100%)	Yes	Yes	Yes	O	80	14
MT	MEA	Both	4 (36%)	Yes	Yes	Yes	O	62	22
NL	Modint	Both	11 (100%)	Yes	Yes	Yes	O	n.d.	n.d.
PL	PIOT	Both	11 (100%)	Yes	Yes	Yes	O	10	0
	PPL	n.d.	n.d.	n.d.	n.d.	n.d.	n.a.	n.d.	n.d.
	ZPPT	n.d.	n.d.	n.d.	n.d.	n.d.	n.a.	n.d.	n.d.
	ZPPPT	n.d.	n.d.	n.d.	n.d.	n.d.	n.a.	n.d.	n.d.
PT	ANIVEC/APIV	Both	7 (64%)	Yes	Yes	Yes	O	23	5
	ATP	Both	11 (100%)	Yes	Yes	No	C	26	4
	ANIL	Only textiles	4 (36%)	Yes	Yes	No	S	5	n.d.
	Anit-Lar	Only textiles	4 (36%)	Yes	Yes	No	S	1	n.d.
	AICR	n.d.	n.d.	Yes	Yes	No	n.d.	1	n.d.
RO	ANITR	n.d.	n.d.	Yes	Yes	No	n.d.	n.d.	3
	Fepaius	Both	11 (100%)	Yes	Yes	No	O	10	3
SE	TEKO	Both	11 (100%)	Yes	Yes	No	C	100	5
SI	ZDS	Both	11 (100%)	Yes	Yes	Yes	O	40	28
	ZTOUPI	Both	8 (73%)	Yes	Yes	Yes	O	30	33
SK	None	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

MS	Employer organisation	NACE 13 (textiles), NACE 14 (clothing) or both covered	Number and share of NACE subcodes covered	All types of companies covered?	Entire country covered?	Other sectors covered?	Sector-relatedness: congruence (C), overlap (O), sectionalism (S), sectional overlap (SO)	Share of the sectoral workforce covered (%)	Share of all companies covered (%)
EU27	**52 EOs**	**Both:35 EOs (69%)** **Only textiles: 7 EOs (13%)** **Only clothing: 4 EOs (8%)**	**Average number of sectors covered: 8** **Average share: 77%**	**Covering all types of companies: 42 EOs (81%)**	**Covering entire country: 47 EOs (90%)**	**Covering other sectors: 29EOs (56%)**	**Overlap: 27 EOs (52%)** **Sectional overlap: 3 EOs (6%)** **Congruence: 8 EOs (15%)** **Sectionalism: 8 EOs (15%)**	35% (calculated for EOs with available data)	13% (calculated for EOs with available data)

Note: *EO, employer organisation; n.a., not applicable; n.d., no data.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 20 presents data on employer organisation density in the textile and clothing sector per organisation and per country, based on aggregated sectoral membership strength. Density is measured both as a proportion of the sectoral workforce and as a proportion of companies in the sector. It is worth mentioning that the incompleteness of available data means that it is difficult to compare relative membership strength among Member States; only 39 of 52 employer organisations have data regarding the number and share of affiliated companies, and 38 have data regarding the workforce employed in affiliated companies.

The table shows that the average organisational density of employer organisation in terms of affiliated companies is 13%.

Twelve employer organisations (one-third of the employer organisations with data) have a company density above the EU27 sectoral average. Countries with company density above the EU average are Austria, Belgium, Croatia, Denmark, Germany, Italy, Latvia, Malta, Slovenia and Spain. Except for Croatia, Latvia and Slovenia, none of the central and eastern European Member States has a density above the sectoral average.

Two-thirds of employer organisations with data have a company density below the sectoral average. Only two employer organisations in two Member States (BIMBT in Austria, HGK UTOI in Croatia) have a company density over 50%.

One-third of employer organisations with data from 11 Member States (Austria, Belgium, Croatia, Denmark, Finland, Germany, Italy, Latvia, Malta, Slovenia, Spain) have a company density rate of between 10% and 49%. This is 10 percentage points higher than the equivalent figure for the trade unions. Most employer organisations with a company density rate of between 10% and 49% originate in western European Member States, the only exceptions being employer organisations from Croatia and Slovenia, a situation comparable with that of the trade unions (where Croatia and Slovenia are also exceptions, in addition to Hungary)

Eighteen employer organisations (45% of employer organisations with data) in eleven Member States (Belgium, Bulgaria, Denmark, Estonia, France, Greece, Hungary, Lithuania, Portugal, Romania, Sweden) have a density of affiliated companies of between 1% and 9%.

Six employer organisations (15% of employer organisations with data) in five Member States have a density of under 1% (Czechia, Estonia, France, Poland, Spain). Such low company density is found in eastern and central European Member States or western European Member States with high levels of fragmentation, such as France and Spain.

The average employer organisation workforce density is 35%, meaning the companies affiliated to sectoral employer organisations included in this study cover 35% of the total sectoral workforce. Average workforce density was calculated only for employer organisations with data on the number and share of employees working in affiliated companies.

Fifteen employer organisations (39% of employer organisations with data) have a workforce density above the average sectoral density. These employer organisations are in Austria, Belgium, Croatia, Denmark, Finland, Germany, Greece, Italy, Latvia, Malta, Slovenia, Spain and Sweden. Except Croatia, Latvia and Slovenia, no country in central and eastern Europe has a workforce density above the sectoral average.

In total, 12 employer organisations (32% of employer organisations with data) have a workforce density higher than 50%. These employer organisations are in Austria, Belgium, Croatia, Denmark, Finland, e, Germany, Italy, Latvia, Malta and Sweden. In some cases, the density reaches 80 or more (Croatia, Finland, Latvia, Sweden). Similarly to company density, high workforce density is rarely seen in central and eastern European Member States, the exception being Latvi and Croatia.

The majority of employer organisations (19 employer organisations, 49%) have a workforce density of between 10 and 49%. Only seven employer organisations have workforce density lower than 10%, two of which have a density under 1% (in Estonia and France).

In terms of the link between company density and workforce density, the data are not perfectly comparable; data are missing for many employer organisations. In the case of some employer organisations (Austria, Croatia, Germany, Latvia, Malta, Slovenia, Spain), high company density (over the sectoral average) is correlated with high workforce density. We see the opposite with other employer organisations: high company density is correlated with rather low workforce density (Austria, Italy). This is due to the prevalence among employer organisation members of small enterprises with few employees. There are also cases where low company density is associated with high sectoral density, particularly in Denmark, Finland, Greece and Slovenia. In all these cases, the discrepancy between company density and sectoral density is due to the number of large enterprises among their affiliates.

Table 20: Employer organisation density in terms of companies and workforce by employer organisation and by Member State

MS	Name	No. of companies affiliated to sectoral EOs	Density in terms of companies (%)	No. of sectoral employees of affiliated	Density in terms of employees of affiliated companies (%)	MS	Density in terms of companies per MS (%)	No. of EOs covered by data	Company density below or above EU average	Density in terms of employees of	No. of EOs covered by data	Workforce density below or above EU27 average
AT	BIMBT	900	72	n.d.	25	AT	98.0	2 (all)	↗	100	2 (all)	↗
	FVTBSL	330	26	n.d.	75							
BE	Crea-moda	160	8	n.d.	75 in NACE 13, 62 in the entire sector	BE	21.0	2 (all)	↗	76	2 (all)	↗
	Fedustria	250	13	n.d.	85 in NACE 14, 14 in the entire sector*							
BG	BAATPE	90	2	n.d.	25	BG	4.1	3 (all)	↘	51	3 (all)	↗
	BATOK	66	1	n.d.	20							
	BOTO	55	1	5,590	6							

MS	Name	No. of companies affiliated to sectoral EOs	Density in terms of companies (%)	No. of sectoral employees of affiliated	Density in terms of employees of affiliated companies (%)	MS	Density in terms of companies per MS (%)	No. of EOs covered by data	Company density below or above EU average	Density in terms of employees of	No. of EOs covered by data	Workforce density below or above EU27 average
CY	None	n.a.	n.a.	n.a.	n.a.	CY	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	ATOK	30	0.2	10,000	19	CZ	0.2	1 (all)	↘	19	1 (all)	↘
DE	textil+ mode	1,400	22.3	135,000	91	DE	22.3	1 (all)	↗	91	1 (all)	↗
DK	DM&T	71	10.8	4,700	85	DK	16.2	2 (all)	↗	100	2 (all)	↗
	Tailors' Guild	35	5.3	n.d.	15							
EE	ERTL	33	3.9	n.d.	n.d.	EE	4.4	2 (all)	↘	0.3	1 (of 2)	↘
	EKL	4	0.5	30	0.3							
EL	SEPEE	250	4.6	10,000	44	EL	9.1	3 (all)	↘	60	2 (of 3)	↗
	SEVK	85	1.6	n.d.	n.d.							
	SKEE	154	2.9	3,500	15							
ES	CIE	4,279	28.8	30,000	46	ES	44.4	3 (all)	↗	99	3 (all)	↗
	Fedecon	2,221	15.0	n.d.	32							
	AEGP	95	0.6	n.d.	21							
FI	Suomen Tekstiili & Muoti	190	12.2	n.d.	90	FI	12.2	1 (all)	↘	90	1 (all)	↗
FR	UIT	314	2.1	22,954	23	FR	4.6	4 (all)	↘	28	3 (of 4)	↘
	UFIMH	115	0.8	4,180	5							
	FHCM	27	0.2	n.d.	n.d.							
	UNACAC	217	1.5	30	0.05							
HR	HUP UTKI	450	34.8	13,000	70	HR	100.0	2 (all)	↗	100	2 (all)	↗
	HGK UTOI	1,290	99.8	18,618	100							
HU	MKSZ	50	1.2	7,000	25	HU	1.2	1 (all)	↘	25	1 (all)	↘
IE	IBEC	n.d.	n.d.	n.d.	n.d.	IE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	SMI	n.d.	n.d.	0	50	IT	18.1		↗	65	2(of 6)	↗

MS	Name	No. of companies affiliated to sectoral EOs	Density in terms of companies (%)	No. of sectoral employees of affiliated	Density in terms of employees of affiliated companies (%)	MS	Density in terms of companies per MS (%)	No. of EOs covered by data	Company density below or above EU average	Density in terms of employees of	No. of EOs covered by data	Workforce density below or above EU27 average
	Confarti-gianato Moda	7,733	18.1	n.d.	n.d.			1 (of 6)				
	CNA Feder-moda	n.d.	n.d.	n.d.	15							
	Casarti-giani	n.d.	n.d.	n.d.	n.d.							
	CLAAI	n.d.	n.d.	n.d.	n.d.							
	Union-tessile Confapi	n.d.	n.d.	n.d.	n.d.							
LT	LATIA	71	1.8	n.d.	n.d.	**LT**	1.8	1 (all)	↘	n.d.	n.d.	n.d.
LU	None	n.a.	n.a.	n.a.	n.a.	**LU**	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LV	VRUA	270	14.2	0	80	**LV**	14.2	1 (all)	↗	80	1 (all)	↗
MT	MEA	10	21.7	400	62	**MT**	21.7	1 (all)	↗	62	1 (all)	↗
NL	Modint	n.d.	n.d.	n.d.	n.d.	**NL**	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
PL	PIOT	78	0.4	14,000	10	**PL**	0.4	1 (of 4)	↘	10	1 (of 4)	↘
	PPL	n.a.	n.d.	n.d.	n.d.							
	ZPPT	n.a.	n.d.	n.d.	n.d.							
	ZPPPT	n.a.	n.d.	n.d.	n.d.							
PT	ANIVEC/ APIV	582	4.7	n.d.	23	**PT**	8.8	2 (of 5)	↘	56	5 (all)	↗
	ATP	500	4.1	35,000	26							
	ANIL	n.d.	n.d.	n.d.	5							
	Anit-Lar	n.d.	n.d.	n.d.	1							
	AICR	n.d.	n.d.	n.d.	1							
RO	ANITR	194	3.0	n.d.	n.d.	**RO**	6.1	2 (all)	↘	10	1 (of 2)	↘
	Fepaius	200	3.1	n.d.	10							
SE	TEKO	200	4.9	7,000	1000	**SE**	4.9	1 (all)	↘	100	1 (all)	↗

MS	Name	No. of companies affiliated to sectoral EOs	Density in terms of companies (%)	No. of sectoral employees of affiliated	Density in terms of employees of affiliated companies (%)	MS	Density in terms of companies per MS (%)	No. of EOs covered by data	Company density below or above EU average	Density in terms of employees of	No. of EOs covered by data	Workforce density below or above EU27 average
SI	ZDS	300	28.1	1,300	40	**SI**	60.9	2 (all)	↗	70	2 (all)	↗
	ZTOUPI	350	32.8	1,700	30							
SK	None	n.a.	n.a.	n.a.	n.a.	**SK**	n.a.	n.a.		n.a.	n.a.	n.a.
EU27	**52**		**Average company density: 13%***		**Average workforce density: 35%**				**10 MS above** **12 MS below**			**15 MS above** **6MS below**

Note: * *The average density is calculated by adding up the employers' organisations density and dividing it by the total number of organisations for which data are available. For Belgium, the data provided by the two employer organisations referred to the share of the workforce in one part of the sector only. Creamoda covers 75% of the NACE 13 workforce (14,833, according to Eurostat, 2017) and Fedustria 85% of the workforce in NACE 14 (3,064, according to Eurostat, 2017). The result is that Creamoda has 11,124 members and Fedustria 2,550 members; the total workforce density of the two employer organisations is thus 76%. EO, employer organisation; n.a., not applicable; n.d., no data.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 21 looks at employer organisation density in terms of companies and workforce and at the proportion of small companies (0–9 employees) in the sector at national level. Bearing in mind that small companies are less likely to join employer organisations, the table explores whether the large proportion of small companies in certain countries influences employer organisation density. It also looks at employer organisation fragmentation in relation to the workforce and company density.

In the textile and clothing sector, the share of employees working for small companies does not impact employer organisation density in terms of affiliated companies or workforce. In some countries, a relatively low proportion of small enterprises coexists with low employer organisation density; this is the case in Bulgaria (company density) and Romania (company and workforce density). In other countries, such as Germany, a low proportion of small companies coexists with a company and workforce density above the European sectoral average.

Furthermore, in some cases a high rate of small companies is associated with medium or high employer organisation density, in terms of companies or workforce; this is the situation in Greece and Finland. In other countries, such as Czechia, a high rate of small companies results in very low company density and relatively low workforce density. The size of the affiliated companies – and not the number – influences workforce density.

It is impossible to establish a link between fragmentation (a number of employer organisations) and employer organisation density because of insufficient data for several employer organisations in countries with a high number of them (such as France, Italy, Poland and Portugal). Based on the available data, it appears that high fragmentation can result in low company density (as in France) but also in high company density (as in Italy) or high workforce density (as in Italy and Portugal). Similarly, low fragmentation is associated with both high employer organisation density (Finland, Germany, Latvia, Malta) and low employer organisation density (Czechia, Hungary).

The conclusion is that the proportion of small companies and (as in the case of the trade unions) the level of fragmentation does not affect sectoral employer organisation density. Other factors, such as the size of affiliated companies and legal frameworks regulating the activity of employer organisations, influence employer organisation density, but the available data for this study do not allow us to formulate any conclusion regarding these factors.

Table 21: Share of small companies, number of employer organisations and company/workforce density

MS	Share of small companies (0–9 employees)	Number of employer organisations	Density in terms of companies (%)	Density in terms of employees of affiliated companies (%)
AT	85	2	98	100
BE	86	2	21	76
BG	70	3	4	51*
CY	94	0	n.a.	n.a.
CZ	96	1	0.2	19
DE	75	1	22	91
DK	84	2	16	100
EE	79	2	4	0.3*
EL	93	3	9	60*
ES	88	3	44	99
FI	94	1	12	90
FR	95	4	5	28*
HR	82	2	100	100
HU	89	1	1	25
IE	91	1	n.d.	n.d.
IT	83	6	18*	65
LT	90	1	2	n.d.
LU	83	0	n.a.	n.a.
LV	90	1	14	80
MT	91	1	22	62
NL	96	1	n.d.	n.d.
PL	90	4	0.4*	10*
PT	78	5	8.8*	56
RO	68	2	6	10*

MS	Share of small companies (0–9 employees)	Number of employer organisations	Density in terms of companies (%)	Density in terms of employees of affiliated companies (%)
SE	98	1	5	100
SI	92	2	61	70
SK	3	0	n.a.	n.a.
EU27	**Average: 87**	**Total: 52**	**Average: 13**	**5**

Note: ** Incomplete data on membership. n.a., not applicable; n.d., no data.*

Source: *Authors' calculations based on Eurostat, Structural Business Statistics 2018, and Network of Eurofound Correspondents, 2020*

Table 22 provides an overview of the reasons for fragmentation of employer organisations in each Member State. Employer organisation fragmentation can be found in 15 Member States – that is, 63% of the 24 Member States with an employer organisation have more than one.

The most frequent reason for fragmentation is that employer organisations representing different parts of the sector or types of activity (06% of the Member States with fragmentation, in nine Member States).

A second important reason is legal status; three Member States have sectoral BAs and sectoral employer organisations, whose members often overlap because of different legal attributions of BAs and employer organisations. Another is that the employer organisations organise different types of companies (in terms of size or ownership). We see this situation in two Member States (13%).

Unlike the trade unions, for which differences in ideology are the main reason for fragmentation, this plays little to no role in employer organisation fragmentation.

Table 22: Reasons for employer organisation fragmentation in the sector

MS	Reason for fragmentation				
	Employer organisations have members in different parts of the country	Employer organisations have members in different types of companies (in terms of size or ownership)	Employer organisations have members in different parts of the sector or types of activity	Employer organisations have similar membership domains but differ in terms of ideology	Other
AT			Yes		
BE			Yes		
BG	Yes				
CY	None				
CZ	n.a.				

MS	Reason for fragmentation				
	Employer organisations have members in different parts of the country	Employer organisations have members in different types of companies (in terms of size or ownership)	Employer organisations have members in different parts of the sector or types of activity	Employer organisations have similar membership domains but differ in terms of ideology	Other
DE	n.a.				
DK		Yes			
EE			Yes		
EL			Yes		
ES			Yes		Yes, within CIE resulting from the exit of AEGP and Fedecon, creating in parallel BA Moda España
FI	n.a.				
FR			Yes		
HR					Yes (1 employer organisation and 1 business association – different legal statuses)
HU	n.a.				
IE	n.a.				
IT		Yes			
LT	n.a.				
LU	None				
LV	n.a.				
MT	n.a.				
NL			Yes		
PL					Yes (they belong to different peak organisations)
PT			Yes		
RO					Yes (1 employer organisation and 1 business association – different legal statuses)
SE	n.a.				

MS	Reason for fragmentation				
	Employer organisations have members in different parts of the country	Employer organisations have members in different types of companies (in terms of size or ownership)	Employer organisations have members in different parts of the sector or types of activity	Employer organisations have similar membership domains but differ in terms of ideology	Other
SI			Yes		
SK	None				
EU27	1 (7%)	2 (13%)	9 (606%)	0	4 (27%)

Note: *n.a., not applicable (because there is only one employer organisation in the country in question). Percentages for the EU27 are based on all countries with trade union fragmentation.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

2.4. Involvement of employer organisations in collective bargaining

Table 23 shows sector-related employer organisation involvement in collective bargaining, social dialogue (bipartite or tripartite) and consultation by the government on sector-related matters. The table shows whether the employer organisations are involved in collective bargaining at company level (single-employer collective bargaining) or sectoral level (multi-employer collective bargaining) or both. The table also gives information on the proportion of the workforce covered by collective bargaining, based on estimates provided by members of the Network of Eurofound Correspondents.

Over one-third of the sector-related employer organisations (18,, In 10 Member States (Bulgaria, Estonia, Greece, Hungary, Ireland, Latvia, Lithuania, Malta, Poland, Romania), do not conduct collective bargaining. Not a single employer organisation included in this study conducts collective bargaining in these countries, with the exception of Bulgaria, where two of the three employer organisations are involved in sectoral collective bargaining. In some cases, the employer organisations do not conduct collective bargaining because their legal status does not allow them to; this is the case for business associations (such as the Croatian Chamber of Economy – Industry and Technology Department Association of Textile and Apparel Industry in Croatia – HGK UTOI . In other cases, employer organisations are involved indirectly in collective bargaining by helping and supporting affiliated members that conduct collective bargaining (for example, in Croatia, Ireland and Latvia).

In 14 Member States (Austria, Belgium, Bulgaria, Czechia, Denmark, Finland, France, Germany, Italy, the Netherlands, Portugal, Slovakia, Spain, Sweden), a total of 33 employer organisations (63%) conduct collective bargaining. Of these, 31 (60%) are involved only in sector-level collective bargaining. In Italy, two employer organisations conduct collective bargaining at both sector and company levels (there is no information available about bargaining at company level for the other four employer organisations in Italy). No employer organisation conducts single-employer collective bargaining (at company level).

There are 25 employer organisations (48%) that conduct collective bargaining on behalf of companies that fall under NACE 13 and 27 (52%) that do so for companies that fall under NACE 14. Almost half of employer organisations (48%) conduct collective bargaining in all four NACE 13 subcodes and almost half (44%) cover all seven NACE 14 subcodes.. Only 10 employer organisations involved in collective bargaining (and for which we have data) cover fewer NACE codes than the average (in Belgium (two organisations), Bulgaria (one organisation), Denmark (one organisation), France (four organisations) and Portugal (two organisations)).

More than half of the employer organisations are involved in bipartite or tripartite social dialogue in the sector (33, or 63%), a similar proportion to the trade unions). In all Member States except Estonia, Greece, Ireland, Latvia, Malta and Portugal (partial data), at least one employer organisation is involved in bipartite or tripartite social dialogue.

Two-thirds of the employer organisations (38, or 73%) are consulted by the government on sector-related matters. The share of employer organisations consulted is higher than the share of trade unions consulted (53%). At least one employer organisation is consulted by the government in every Member State except Ireland, Latvia and Malta.

Apart from the three employer organisations in those same Member States (Ireland, Latvia, Malta), all other employer organisations are involved in collective bargaining or involved in bipartite or tripartite social dialogue or consulted by the government on sector-related matters. However, the three employer organisations in those three countries provide assistance and consultation to their affiliated members that are involved in collective bargaining at company level.

Table 23: Involvement of sectoral employer organisations in collective bargaining and social dialogue

MS	EO	CB at sector or company level or both	NACE 13.1	NACE 13.2	NACE 13.3	NACE 13.9	NACE 14.11	NACE 14.12	NACE 14.13	NACE 14.14	NACE 14.19	NACE 14.20	NACE 14.3	NACE 13	NACE 14	Total CB coverage (%)	Involved in bipartite or tripartite SD	Consulted by the government on sector-related matters	Affiliation to Euratex
AT	BIMBT	Sector												4	7	100			
	FVTBSL	Sector												4	7				
BE	Creamoda	Sector												4	0	90–100			
	Fedustria	Sector												0	7				
BG	BAATPE	Sector												3	4	70			
	BATOK	Sector	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.				
	BOTO	No CB												0	0		n.d.	n.d.	n.d.
CY	None	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	ATOK	Sector												4	7	60			
DE	textil+mode	Sector												4	7	80			
DK	DM&T	Sector												4	7	75–80			
	Tailors' Guild	Sector												0	7				
EE	ERTL	No CB												0	0	0			
	EKL	No CB												0	0	0.7			
EL	SEPEE	No CB												0	0	0			
	SEVK	No CB												0	0				
	SKEE	No CB												0	0				

MS	EO	CB at sector or company level or both	NACE 13.1	NACE 13.2	NACE 13.3	NACE 13.9	NACE 14.11	NACE 14.12	NACE 14.13	NACE 14.14	NACE 14.19	NACE 14.20	NACE 14.3	NACE 13	NACE 14	Total CB coverage (%)	Involved in bipartite or tripartite SD	Consulted by the government on sector-related matters	Affiliation to Euratex
ES	CIE	Sector												4	7	100			
	Fedecon	Sector												4	7				
	AEGP	Sector												4	7				
FI	Suomen Tekstiili & Muoti	Sector												4	7	82			
FR	UIT	Sector												4	3	99			
	UFIMH	Sector												0	4				
	FHCM	Sector												0	5				
	UNACAC	Sector												0	5				
HR	HUP UTKI	Company *												0	0	58			
	HGK UTOI	No CB												0	0				
HU	MKSZ	No CB												0	0	50			
IE	IBEC	No CB												0	0	20			
IT	SMI	Both												4	7	100			
	Confarti-gianato Moda	Sector**												4	7				
	CNA Federmoda	Both												4	7				

MS	EO	CB at sector or company level or both	NACE 13.1	NACE 13.2	NACE 13.3	NACE 13.9	NACE 14.11	NACE 14.12	NACE 14.13	NACE 14.14	NACE 14.19	NACE 14.20	NACE 14.3	NACE 13	NACE 14	Total CB coverage (%)	Involved in bipartite or tripartite SD	Consulted by the government on sector-related matters	Affiliation to Euratex
	Casartigiani	Sector**												4	7				
	CLAAI	Sector**												4	7				
	Uniontessile Confapi	Sector**												4	7				
LT	LATIA	No CB												0	0	n.d.			
LU	None	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LV	VRUA	No CB												0	0	0			
MT	MEA	No CB												0	0	63			
NL	Modint	Sector												4	7	100			
PL	PIOT	No CB												0	0	0.2			
	PPL	No CB												0	0		n.a.	n.d.	
	ZPPT	No CB												0	0		n.a.	n.d.	
	ZPPPT	No CB												0	0		n.a.	n.d.	
PT	ANIVEC/ APIV	Sector												4	7	91			
	ATP	Sector												4	7				
	ANIL	Sector												4	0		n.d.	n.d.	***
	Anit-Lar	Sector												4	0		n.d.	n.d.	
	AICR	Sector	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.		n.d.	n.d.	
RO	ANITR	No CB												0	0	75	n.d.	n.d.	

MS	EO	CB at sector or company level or both	NACE 13.1	NACE 13.2	NACE 13.3	NACE 13.9	NACE 14.11	NACE 14.12	NACE 14.13	NACE 14.14	NACE 14.19	NACE 14.20	NACE 14.3	NACE 13	NACE 14	Total CB coverage (%)	Involved in bipartite or tripartite SD	Consulted by the government on sector-related matters	Affiliation to Euratex
	Fepaius	No CB												0	0				
SE	TEKO	Sector												4	7	90			s
SI	ZDS	Sector												4	7	100			
	ZTOUPI	Sector												4	7				
SK	None	n.a.	n. a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
EU27	**52 EOs**	**33 EOs involved in CB (63%)**												**26 EOs**	**28 EOs**	**Average CB coverage 55%**	**33 EOs**	**38 EOs**	**222 EOs**

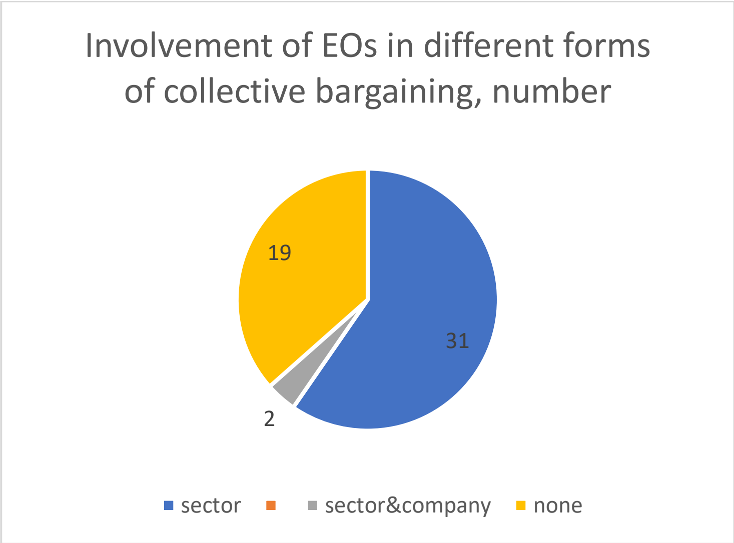
Note: ** HUP UTKI provides assistance to its members that are involved in company-level bargaining. ** There are no data for Italy regarding involvement in company-level collective bargaining, but it has been assumed that Italian employer organisations are involved in this type of collective bargaining. *** According to the ANIL website. CB, collective bargaining; EO, employer organisation; n.a., not applicable; n.d., no data; SD social dialogue.*

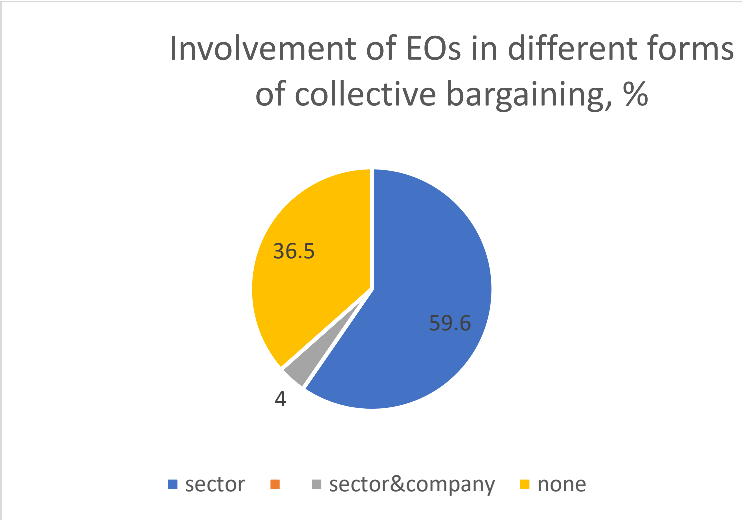
Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Figure 14 shows the involvement of employer organisations in collective bargaining. More than one-third of employer organisations are not involved in sectoral collective bargaining. Two-thirds of employer organisations are involved in collective bargaining; this figure is lower than that for the trade unions (88% of which are involved in sectoral collective bargaining; see Figure 13).

The vast majority of employer organisations that do participate in collective bargaining are involved only in multi-employer (sector-level) collective bargaining. Only 4% (two employer organisations) are involved in both multi-employer and single-employer collective bargaining. No employer organisation is involved only in single employer (company-level) collective bargaining.

Figure 14: Involvement of sectoral employer organisations in forms of collective bargaining





Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 24 looks at employment and collective bargaining in the largest companies in NACE 13 and NACE 14. For each of the 27 Member States, information was collected on the two largest companies (by number of employees) in textile manufacture (NACE 13) and clothing manufacture (NACE 14). Of the

89 companies on which data were available, 44 were in NACE 13 and 45 were in NACE 14. Information on collective agreements covering each company's employees is included.

In Denmark, Spain and Sweden, the five largest companies in textile manufacture are also the five largest in clothing manufacture.

More than two-thirds of the largest companies in textile manufacture (32 companies, 82% of the companies for which data on collective bargaining is available) and two-thirds in clothing manufacture (33 companies, 80% of those for which data on collective bargaining are available) are covered by collective bargaining (single-employer bargaining, multi-employer bargaining or both).

The 89 largest companies for which we have data account for 3% of sectoral employment in the EU27.

Table 24: Largest employers in the textile and clothing sector and their collective bargaining coverage

	NACE 13				NACE 14			
MS	**Largest textile employer**	**Number of employees**	**Share of total national textile and clothing workforce (%)**	**Covered by collective bargaining?**	**Largest clothing employer**	**Number of employees**	**Share of total national textile and clothing workforce (%)**	**Covered by collective bargaining?**
AT	Getzner Textil AG	872	6.6	Yes	Huyck.Wangner Austria GmbH	533	4.0	Yes
	Wolford AG	614	4.6	Yes	Sattler Group	490	3.7	Yes
BE	Balta Industries	2,150	12.0	Yes	Van De Velde	500	2.8	Yes
	Utexbel	720	4.0	Yes	Mayerline	180	1.0	Yes
BG	E. Miroglio	1,600	1.6	Yes	Pirin-Tex EOOD	1,600	1.6	Yes
	Zalli (Calzedonia Holding)	1,200	1.2	n.d.	n.d.	n.d.	n.d.	n.d.
CY	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
CZ	JUTA	2,263	4.4	Yes	PLEAS	689	1.3	Yes
	Nová Mosilana	976	0.8	Yes	Tonak	564	0.5	Yes
DE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
DK	Ege Carpets Ltd	322	6.1	Yes	Ege Carpets Ltd	322	6.1	Yes
EE	Wendre	708	7.3	n.d.	Triest-Val	258	2.6	n.d.
	Mistra-Autex	261	2.7	n.d.	Svarmil	247	2.5	n.d.
EL	Epilektos SA	350	1.5	No	BSB SS	522	2.3	No
	Varvaressos SA	212	0.9	No	Minerva SA	237	1.0	No
ES	Inditex	6,000	6.7	Yes	Inditex	6,000	6.7	Yes

MS	NACE 13				NACE 14			
	Largest textile employer	Number of employees	Share of total national textile and clothing workforce (%)	Covered by collective bargaining?	Largest clothing employer	Number of employees	Share of total national textile and clothing workforce (%)	Covered by collective bargaining?
	Mango Punto FA	1,000	1.1	Yes	Mango Punto FA	1,000	1.1	Yes
FI	Vitrulan Composites Oy	109	1.5	Yes	L-Fashion Group Oy	235	3.9	Yes
	Suominen Kuitukankaat Oy	93	1.5	Yes	Leijona Group Oy	61	1.0	Yes
FR	n.d.	n.d.	n.d.	n.d.	Hanes France	1,300	3.3	Yes
	n.d.	n.d.	n.d.	n.d.	Lacoste Operation	1,200	1.5	Yes
HR	Čateks	300	1.7	Yes	Varteks	1,200	6.7	Yes
	Keltex	200	1.1	n.d.	Kotka	600	3.3	Yes
HU	Kézmű Fővárosi Kézműipari Nonprofit Kft	3,537	10.1	Yes	ARJ Ruhagyár Zrt	509	1.5	Yes
	Propex Furnishing Solutions	322	0.9	Yes	Styl Fashion Ruhaipari Korlátolt Felelosségu Társaság	279	0.8	Yes
IE	Pownall and Hampson	150	4.8	Yes	Donegal Yarns	40	1.3	Yes
	Botany Weaving	85	2.7	Yes	Azzuri Sport	30	1.0	No
IT	Suedwolle Group Italia Spa	751	0.2	Yes	Dolce e Gabbana Srl	1,914	0.6	Yes
	Zegna Baruffa Lane Borgosesia Spa	738	0.2	Yes	Valentino Spa	1,253	0.4	Yes
LT	Siūlas, AB	366	0.1	Yes	Utenos trikotažas, AB	733	2.6	Yes
	Danspin, UAB	350	1.2	n.d.	Lelija, UAB	565	2.0	Yes
LU	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
LV	Lauma Fabrics SIA	434	3.5	Yes	Spectre Latvia SIA	404	3.3	No

MS	NACE 13				NACE 14			
	Largest textile employer	**Number of employees**	**Share of total national textile and clothing workforce (%)**	**Covered by collective bargaining?**	**Largest clothing employer**	**Number of employees**	**Share of total national textile and clothing workforce (%)**	**Covered by collective bargaining?**
	Artex Latvia	190	1.5	No	Fristads Production SIA	219	1.8	No
MT	Nylon Knitting	200	43.4	Yes	Bare Sports Malta	80	17.4	Yes
NL	Ten Cate Nederland BV	3,658	22.8	Yes	Textielfabriek H. van Puijenbroek BV	100	0.6	Yes
	Vlisco Netherlands BV	838	5.2	Yes	L. ten Cate BV	50	0.3	Yes
PL	TZMO SA	7,600	4.8	No	LPP SA	14,294	9.0	No
	Euro-Comfort Sp. z o.o.	1,000	0.6	No	Big Star Limited Sp. z o.o.	1,200	0.8	No
PT	Riopele Têxteis	883	0.6	Yes	Petratex – Confeções	577	0.4	Yes
	Lameirinho – Indústria Têxtil	697	0.5	Yes	Confetil	287	0.2	Yes
RO	GST Safety Textiles RO SRL	706	0.4	Yes	Artifex	1,215	0.8	n.d.
	Rifil SA	636	0.4	Yes	Cottontex	1,062	0.7	Yes
SE	ESSITI	1,800	27.6	Yes	ESSITI	1,800	27.6	Yes
	Albany International	337	5.2	Yes	Albany International	337	5.2	Yes
SI	Filc	371	5.7	Yes	Lisca	200	3.1	Yes
	Predilnica Litija	239	3.7	Yes	Moda Mi & Lan	150	2.3	Yes
SK	Honeywell Safety Products Slovakia s.r.o., Partizanske	540	2.2	No	Eterna, s.r.o. Banovce nad Bebravou	600	2.5	No
	Spilatex, s.r.o., Levice	270	1.1	No	Tytex Slovakia, s.r.o. Humenne	550	2.3	No

Note: *n.d., no data.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

2.5. Collective bargaining patterns, social dialogue practices and public policy participation in EU

Table 25 summarises the extent of different types of collective bargaining in the textile and clothing sectors.

The share of employer organisations not involved in collective bargaining is three times higher than the equivalent figure for the trade unions. This situation results from the fact that company-level collective bargaining, which takes place in 12 Member States (see Table 26), is usually conducted by the company management/owner and not by an employer organisation. In most cases, employer organisations offer assistance and consultation to their affiliated members that are involved in collective bargaining.

Unlike the trade unions, one-third of which are involved in company-level collective bargaining only, none of the employer organisations conducts collective bargaining at company level. However, single-employer bargaining often takes place, and collective bargaining at company level is conducted by the employer organisations' affiliated companies.

The share of employer organisations involved in sector-level collective bargaining only is three times higher than that of trade unions. Sector-level collective bargaining only is predominant for employer organisations, in contrast with trade unions, for which this is the least frequent situation.

Most of the trade unions (over one-third) are involved in both single- and multi-employer collective bargaining (at company and sector levels).

Table 25: Collective bargaining in the textile and clothing sector

Employer organisations			**Trade unions**		
No collective bargaining	*number*	19	**No collective bargaining**	*number*	8
	%	37		*%*	12
Sector level	*number*	31	**Sector level**	*number*	14
	%	60		*%*	21
Company level	*number*	0	**Company level**	*number*	20
	%	0		*%*	30
Both company and sector	*number*	2	**Both company and sector**	*number*	24
	%	4		*%*	36

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 26 presents information on collective bargaining in the textile and clothing sector on a country-by-country basis, illustrating the different national collective bargaining patterns. The data show that in 12

Member States collective bargaining takes place at company level only. With the exception of Ireland, Luxembourgh and Malta, the countries are all newer Member States (largely in central and eastern Europe).

Sector-level multi-employer collective bargaining takes place in 14 Member States. Of these, in nine Member States multi-employer collective bargaining happens alongside single-employer collective bargaining (company and sector levels coexist). In another five Member States, collective bargaining is conducted only at sector level. With the exception of Bulgaria, Czechia and Slovenia, all the countries in which multi-employer collective bargaining takes place are older Member States.

One Member State (Greece) has no collective bargaining in the sector whatsoever. The last sectoral collective employment agreement was signed in 2008. The main reason for this was the introduction of new legislation on collective bargaining, which placed very strict conditions on collective agreements. This, coupled with weak trade unions, led to the end of collective bargaining in the sector.

Table 26: Level of collective bargaining in the Member States

Level of collective bargaining	**Member state**
Company level only	CY, EE, HR, HU, IE, LT, LU, LV, MT, PL, RO, SK
Company and sector level	BE, BG, CZ, DK, ES, FR, IT, NL, SI
Sector level only	AT, DE, FI, PT, SE
No collective bargaining	EL

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 27 examines collective bargaining coverage and collective bargaining patterns in the 27 Member States. The table shows how the various collective bargaining patterns relate to collective bargaining coverage in the Member States.

High collective bargaining coverage exists in Member States with only multi-employer collective bargaining or where both multi-employer and single-employer collective bargaining are conducted. In all the Member States where only multi-employer collective bargaining takes place (Austria, Finland, Germany, Portugal, Sweden), collective bargaining coverage is at least 75%.

Of the nine Member States where both single-employer and multi-employer collective bargaining are conducted (Belgium, Bulgaria, Czechia, Denmark, France, Italy, the Netherlands, Slovenia, Spain), six of them have collective bargaining coverage exceeding 94% (Belgium, France, Italy, the Netherlands, Slovenia, Spain).

Lower collective bargaining coverage is characteristic of Member States where only company-level collective bargaining takes place. Just 4 countries out of 12 in which only company-level collective bargaining takes place have collective bargaining coverage higher than 50%. In six others, collective bargaining coverage is under 25%.

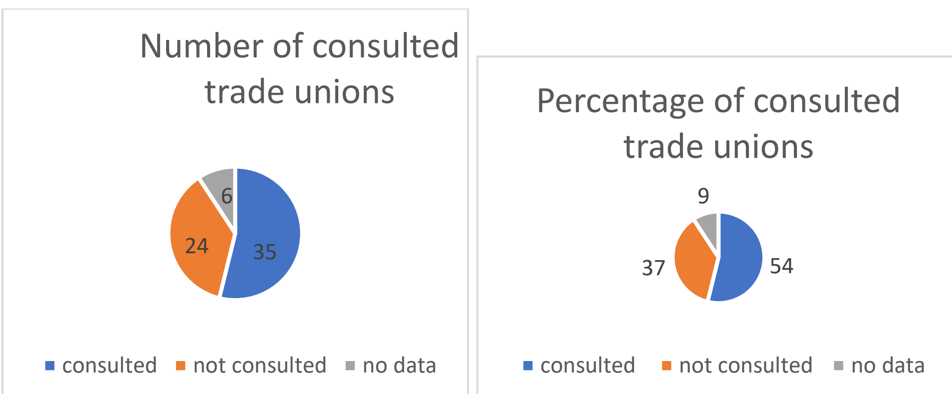
Table 27: Coverage of collective bargaining by Member States, 2020

Type of collective bargaining	Collective bargaining coverage						Information not available
	> 94%	75–94%	50–74%	25–49%	0.1–24%	0%	
Sector level only	AT,	DE, FI, PT, SE					
Company level only			HR, HU, MT, RO		CY, EE, IE, LV, PL, SK		LT, LU
Both	BE, ES, FR, IT, NL, SI	DK	BG, CZ				
No collective bargaining						EL	

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

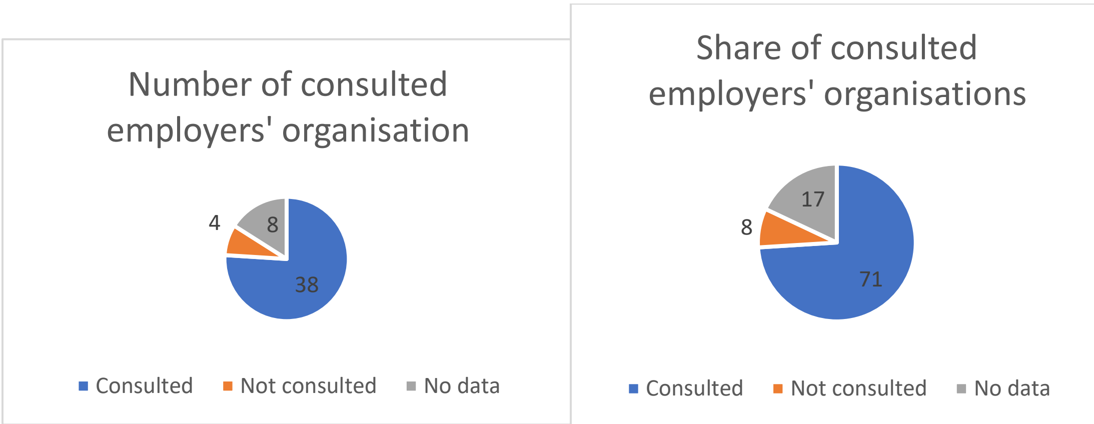
Figures 15 and 16 provide an overview of the involvement of trade unions and employer organisations in government consultation regarding sector-related matters. More than half of trade unions and over two-thirds of employer organisations are consulted. One-third of trade unions are not consulted, compared with less than 10% of employer organisations.

Figure 15: Trade union involvement in consultation



Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Figure 16: Employer organisation involvement in consultation



Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 28 provides an overview of consultation of trade unions and employer organisations in each of the 27 Member States. The data show that in more than two-thirds of Member States at least one sectoral employer organisation and one trade union are consulted by the government.

In four Member States (Cyprus, Ireland, Luxembourg, Malta) no employer organisation and no trade union is consulted; two of the four (Cyprus and Luxembourg) have no employer organisation. Trade unions in Portugal claim not to be consulted, but information is lacking for two of them.

Table 28: Consultation of employers and trade unions in the Member States

	At least one trade union consulted	No trade union consulted
At least one employer organisation consulted	AT, BE, BG, DE, DK, EE, ES, FI, FR, HR, HU, IT, LT, LV, NL, PL, RO, SE, SI	CZ,* EL, PT***
No employer organisation consulted	SK**	CY,** IE, LU,** MT

Note: ** Only through umbrella organisations; ** No employer organisation exists; *** No information available for two out of three trade unions.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 29 provides an overview of the bipartite and tripartite social dialogue bodies that exist in the 27 Member States and indicates the trade unions and employer organisations that participate in these structures.

In total, 15Member States have sector-related bipartite and/or tripartite bodies. The total number of these bodies is 35 In Latvia, the Netherlands and Slovakia, at least one of the tripartite bodies included is not sector specific, but occasionally it addresses sector-related matters.

Around two-thirds of the sectoral bodies are bipartite bodies and only around one-third are tripartite. Over Half of the bodies (20) are statutory and one-third (11)were established by agreement; for 4 bodies , data on this aspect are missing.

The main topics discussed in these bodies are training and vocational education, working conditions, health, welfare and social security.

Table 29: Bipartite and tripartite social dialogue bodies in the textile and clothing sector

MS	Name of the body/ scope of activity	Bipartite or tripartite	Origin: agreement or statutory	Sector-related trade unions with representation	Sector-related employer organisations with representation
AT	None	n.a.	n.a.	n.a.	n.a.
BE	Security of Livelihood Fund for the Clothing and Tailoring Industry	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Creamoda
	Social Security Fund for the Clothing and Tailoring Industry	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Creamoda
	Social Fund for White-collar Workers in the Clothing and Tailoring Sector	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Creamoda
	Social Guarantee Fund for White-collar Workers of Clothing and Tailoring Companies	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Creamoda
	Textile Security Fund	Bipartite	Statutory	ACV-CSC Metea, ACV-CSC CNE, ACLVB-CGSLB, ABVV-FGTB ACCG	Fedustria
	Guarantee and Social Fund of the Textile Industry	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Fedustria
	Joint Compensation Fund for the Social Institutions of the Textile Industry in Verviers	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Fedustria
	Security of Existence Fund for the Textile Industry of the Administrative District of Verviers	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Fedustria
	Supplementary Insurance Fund for the Textile Industry in Verviers	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ACCG	Fedustria

MS	Name of the body/ scope of activity	Bipartite or tripartite	Origin: agreement or statutory	Sector-related trade unions with representation	Sector-related employer organisations with representation
	Security of Livelihood Fund for the Manufacture of and Trade in Sacks and Bags Made of Jute or Substitute Materials	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Creamoda
	Guarantee Fund for the Security of White-collar Employees in the Textile Industry	Bipartite	Statutory	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	Creamoda
BG	Sectoral Council for Tripartite Cooperation – Light Industry	Tripartite	Statutory	FNSOLP, Podkrepa	BAATPE, BOTO
	Sectoral Council on Working Conditions – Light Industry	Tripartite	Statutory	FNSOLP, Podkrepa	BAATPE, BATOK, BOTO
CY	None	n.a.	n.a.	n.a.	n.a.
CZ	None	n.a.	n.a.	n.a.	n.a.
DE	Employers' Mutual Insurance Company	Bipartite	Statutory	None	None
DK	Vocational Committee for Clothing Craftsmen and Textile and Clothing Assistants	Tripartite	Statutory	3F	DM&T, Tailors' Guild Copenhagen
	Trade Association for Working Environment – Industry	Tripartite	Statutory	3F Industri, HK, TL	DM&T
EE	None	n.a.	n.a.	n.a.	n.a.
EL	None	n.a.	n.a.	n.a.	n.a.
ES	Industrial Observatory of the Textile and Clothing Sector	Tripartite	Agreement	CCOO de Industria, UGT FICA	CIE, Fedecon, AEGP
	Social Forum of the Fashion industry	Bipartite	Agreement	CCOO de Industria, UGT FICA	CIE, Fedecon, AEGP
FI	Textil-Confección	Bipartite	n.d.	Pro	Suomen Tekstiili & Muoti
	National Forum for Skills Anticipation – Manufacture Group	Tripartite	n.d.	Pro, Finnish Industrial Union	Suomen Tekstiili & Muoti

MS	Name of the body/ scope of activity	Bipartite or tripartite	Origin: agreement or statutory	Sector-related trade unions with representation	Sector-related employer organisations with representation
FR	Commission paritaire permanente de négociation et d'interprétation	Bipartite	Agreement	CMTE-CFTC, FS-CFDT, CFE-CGC Chimie, FO Fédéchimie, CGT-TCHB	UIT
	Commissions paritaires nationales de l'emploi des industries du textile	Bipartite	Agreement	CMTE-CFTC, FS-CFDT, CFE-CGC Chimie, FO Fédéchimie, CGT-TCHB	UIT
	Commission paritaire permanente de négociation, d'interprétation et de conciliation des industries de l'habillement	Bipartite	Agreement	CMTE-CFTC, FS-CFDT, CFE-CGC Chimie, FO Phamacie, FO Fédéchimie, CGT-TCHB	UFIMH
	Commissions paritaires nationales de l'emploi des industries de l'habillement	Bipartite	Agreement	CMTE-CFTC, FS-CFDT, CFE-CGC Chimie, FO Pharmacie, CGT-TCHB	UFIMH
HR	Social Council for Textiles, Garments, Leather, Rubber	Tripartite	Agreement	Sindtokg	HUP UTKI
HU	Sectoral Social Dialogue Committee for the Textile Industry	Tripartite	Statutory	BDSZ	MKSZ
IE	None	n.a.	n.a.	n.a.	n.a.
IT	Previmoda	Bipartite	Agreement	FEMCA-CISL, FILCTEM, UILTEC-UIL	SMI
	Sanimoda	Bipartite	Agreement	FEMCA-CISL, FILCTEM, UILTEC-UIL	SMI
LT	None	n.a.	n.a.	n.a.	n.a.
LU	None	n.a.	n.a.	n.a.	n.a.
LV	Sector Expert Council: Textiles, Apparel, Leather and Leather Products	Tripartite	Statutory	LIA	VRUA
	National Tripartite Cooperation Council*	Tripartite	Statutory	Free Trade Union Confederation of Latvia (peak-level trade union)	Employers' Confederation of Latvia (peak-level employer organisation)
MT	None	n.a.	n.a.	n.a.	n.a.
NL	Social and Economic Council*	Tripartite	n.d.	CNV (peak-level trade union)	VNO-NCW (peak-level employer organisation)

MS	Name of the body/ scope of activity	Bipartite or tripartite	Origin: agreement or statutory	Sector-related trade unions with representation	Sector-related employer organisations with representation
	Labour Foundation*	Bipartite	n.d.	CNV	VNO-NCW
PL	Tripartite Time for Light Industry	Tripartite	Statutory	FNV (peak-level trade union)	LTO (peak-level employer organisation)
PT	None	n.a.	n.a.	n.a.	n.a.
RO	Comitex Textile Sectoral Committee	Bipartite	Agreement	FNSIU Uniconf, Confpeltex	
SE	None	n.a.	n.a.	n.a.	n.a.
SI	None	n.a.	n.a.	n.a.	n.a.
SK*	Economic and Social Council	Tripartite	Agreement	IOZ (via membership of KOZ SR)	None

Note: *n.a., not applicable; n.d., no data. *In the case of Latvia, Netherlands, and Slovakia, these are not sector specific bodies.*

Source: *Network of Eurofound Correspondents, 2020*

2.6. Multisectoralism of trade unions and employer organisations in the textile and clothing sector

In the 2010 Commission staff working document on the functioning of the ESSDCs, the European Commission encouraged initiatives between committees and between cross-industry and sectoral European social dialogue forums, emphasising that cooperation and exchange of information between ESSDCs can reinforce the value of European sectoral social dialogue while avoiding duplication of work and divergence of social partners' positions (European Commission, 2010). The following analysis of multisectoralism aims to help social partners in the textile and clothing sector to find ways to cooperate meaningfully with other ESSDCs.

Table 30 shows the numbers and shares of textile and clothing trade unions and employer organisations that also feature in representativeness studies on the commerce sector (2018), the leather and tanning sector (2017) and the footwear sector (2018), which were found to be the sectors in which multisectoralism with the textile and clothing sector most often occurs. Multisectoralism is clearly more common among trade unions and much less significant for employer organisations. Footwear is the main other sector in relation to multisectoralism in the textile and clothing sector: 39 trade unions in 20 Member States and 10 employer organisations in 6 Member States also have members in the footwear sector.

Table 30: Other sectors covered by trade unions and employer organisations in the textile and clothing sector

	Trade unions	Employer organisations
Commerce	27 trade unions in 14 Member States (41% of trade unions in the sector)	7 employer organisations in 4 Member States (13% of employer organisations in the sector)
Tanning and leather	34 trade unions in 16 Member States (52% of trade unions in the sector)	4 employer organisations in 3 Member States (8% of employer organisations in the sector)
Footwear	39 trade unions in 20 Member States (59% of trade unions in the sector)	10 employer organisations in 6 Member States (19% of employer organisations in the sector)

3. European level of interest representation

3.1. Membership domain of IndustriAll Europe

Of 66 sector-related trade union organisations, 50 are affiliated to IndustriAll Europe.[12] Trade unions affiliated to IndustriAll Europe are found in 26 Member States; only in Greece does IndustriAll Europe have no textile and clothing sector trade union affiliated to it. In 24 Member States (excluding Cyprus,[13] Greece and Poland), the largest sectoral trade union is affiliated to IndustriAll Europe.[14] The majority of the unions affiliated to IndustriAll Europe are the largest or second largest in their country.

Table 31 summarises the representativeness of IndustriAll Europe in the sector, showing its affiliated trade unions. Of the 50 trade unions that are affiliated to IndustriAll Europe, four (in Denmark and Poland) are affiliated indirectly (through umbrella organisations). In total, more than two-thirds of the trade unions (76%) are affiliated to IndustriAll Europe.

In nine Member States (Croatia, Czechia, Estonia, Germany, Ireland, Latvia, Malta, Slovakia, Slovenia), the only trade union in the sector is affiliated to IndustriAll Europe. In six countries with more than one trade union (Austria, Bulgaria, Denmark, Finland, Lithuania, Portugal) all unions in the sector are affiliated to IndustriAll Europe. In the remaining 11 Member States with trade union pluralism (Belgium, CyprusY, France, Hungary, Italy, Luxembourg, the Netherlands, Poland, Romania, Spain, Sweden), at least one sectoral trade unions is affiliated to IndustriAll Europe, but not all are. In all these Member States except Cyprus and Poland, the largest trade union is affiliated to IndustriAll Europe. In Luxembourg, IndustriAll Europe has two members among the textile sector trade union. Although both trade unions reported to be affiliated to industriAll Europe, only OGB-L indicated membership in the textile sector.

Table 31: Sector-related trade unions and IndustriAll Europe affiliation

MS	Trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe	Is the largest trade union affiliated to IndustriAll Europe?
AT	PRO-GE, GPA	None	Yes
BE	ACV-CSC Metea, ACLVB-CGSLB, ABVV-FGTB ACCG	ACV-CSC CNE	Yes
BG	FNSOLP, Podkrepa	None	Yes
CY	OBIEK-SEK	SEVETTYK-PEO	No*
CZ	OS TOK	None	Yes

[12] Four of which, in Denmark and Poland, are affiliated indirectly (through an umbrella organisation).
[13] In Cyprus the difference between the two trade unions in the sector is very small, due to very low membership.
[14] In Hungary, HVDSZ 2000 also claims it is the largest. HVDSZ 2000 specialises in representing people with disabilities, and these are employed in the textile sector in large numbers (with state support). Other unions do not recognise this as a legitimate activity. The largest trade union in Luxembourg is affiliated to IndustriAll Europe, and the coverage of the the textile and clothing sector by this trade union was indicated after the data collection stage was finalised and was not verified by Eurofound's national correspondent.

MS	Trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe	Is the largest trade union affiliated to IndustriAll Europe?
DE	IG Metall	None	Yes
DK	3F**, HK**, TL**	None	Yes
EE	ETTAF	None	Yes
EL	None	OEKIDE, PSPKM	No
ES	CCOO de Industria, UGT FICA, ELA, FI-USO	CIG Industria	Yes
FI	Finnish Industrial Union, Pro	None	Yes
FR	CFE-CGC Chimie, FO Fédéchimie, FS-CFDT, CGT-THCB, CMTE-CFTC	UNSA Textile, FO Pharmacie	Yes
HR	Sindtokg	None	Yes
HU	BDSZ	HVDSZ 2000, MTSZSZ, VSZSZ – Propex MSZ	Yes***
IE	SIPTU	None	Yes
IT	FILCTEM, FEMCA-CISL, UILTEC-UIL	UGL Chimici	Yes
LT	LLPPS, LPĮPS Solidarumas	None	Yes
LU	OGB-L	LCGB	Yes****
LV	LIA	None	Yes
MT	GWU	None	Yes
NL	CNV Vakmensen, FNV Procesindustrie	De Unie	Yes
PL	FNSZZPL*****	NSZZ Solidarność	Yes
PT	Fesete, SIMA, Sindeq	None	Yes
RO	FNSIU Uniconf, FNS Solidaritatea Metal, Confpeltex	FSLR	Yes
SE	IF Metall, Unionen, Sveriges Ingenjörer	Ledarna	Yes
SI	STUPIS	None	Yes
SK	IOZ	None	Yes
EU27	**50 trade unions/26 Member States**	**16 trade unions**	**24 Member States**

Note: ** In Cyprus, the difference in size between the two trade unions in the sector is insignificant due to very low membership. ** Indirect affiliation through CO-industri. *** In Hungary, HVDSZ 2000, like BDSZ, claims it is the largest trade union, but it specialises in representing disabled people employed in the sector with state support, which is not recognised as a legitimate activity by other trade unions.**** In Luxembourg the two trade unions are affiliated to IndustriAll, but o sectoral membership was confirmed for OGB-L only . ***** Indirect affiliation through the Confederation of Industrial Trade Unions*

Table 32 offers multiple perspectives on IndustriAll Europe's coverage: percentage of the sectoral workforce covered, membership domains, NACE codes and subcodes covered, types of workers covered (only blue collar or white collar, or both) and geographical coverage (the entire country or only part of it). The table also looks at the size of IndustriAll Europe affiliates compared with other national trade unions (i.e. if they are the largest or the second largest).

The percentage of the EU27 sectoral workforce covered by the 50 trade unions affiliated to IndustriAll Europe is 12%, the same as for all sector-related unions.

The data suggest that the vast majority of IndustriAll Europe affiliates (40 trade unions) have an overlapping membership domain. These trade unions cover both the textile and clothing subsectors but have a larger membership domain, covering other sectors as well. Only two trade unions represent the entire sector exclusively (congruence). Another six trade unions represent other sectors, but only one NACE code (13 or 14) (sectional overlap). No trade union affiliated to IndustriAll Europe covers only part of the sector (sectionalism). Of the 66 sector-related trade unions in the EU27, the 50 IndustriAll Europe members tend to have a slightly broader membership domain: 80% of IndustriAll Europe affiliates represent both parts of the sector and other sectors; the equivalent figure for all sector-related trade unions is 67% (see Table 7). This means that IndustriAll Europe affiliates in particular are active in other sectors, too.

Data on sectoral coverage (number of NACE subcodes represented) show that the average number of subcodes covered by IndustriAll Europe affiliates is eight, or 77%. These figures are slightly higher than for all sector-related trade unions, for which the average number of NACE subcodes covered is around seven or 66%. More than half of IndustriAll Europe affiliates in the sector (27 trade unions, 54%) represent all NACE codes, which is 10 percentage points higher than for all sector-related trade unions (47%; see Table 14). Only nine unions[15] affiliated to IndustriAll Europe (16%) cover less than 50% of NACE subcodes. This is almost 10 percentage points lower than the figure for all sector-related trade unions at EU27 level, one-quarter of which cover less than 50% of NACE subcodes. This indicates that 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.

Table 32 shows that more than three-quarters (76%) of unions affiliated to IndustriAll Europe (38 trade unions) represent all types of workers (blue and white collar) and almost all of them (92%) cover the entire country. Both figures are slightly higher than those for all sector-related trade union organisations (see Table 14). This shows that IndustriAll Europe affiliates have better coverage both geographically and in terms of types of workers than sector-related trade unions as a whole.

The majority of IndustriAll Europe affiliates (36 trade unions, 71%) are the largest or second largest union in their country. Of these, almost half (23) are the largest trade unions in the sector, while around a quarter (13) are the second largest. Twelve trade unions are not among the largest or second largest unions in the sector.

[15] No precise data on parts of the sector covered was available for OGB-L, thus it is not counted.

Table 32: IndustriAll Europe affiliates by types of coverage: sectoral workforce, sector-relatedness, subsectoral coverage, worker types and geographical coverage

MS	Trade union	Sectoral workforce (number)	Sectoral workforce (%)	Domain coverage	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	Total NACE 13 subcodes	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	Total NACE 14 subcodes	Width (%)	Other sectors	All worker types	Entire country	Largest	Second largest
AT	PRO-GE	3,000	23	O					4								7	100					
	GPA	1,350	10	O					4								7	100					
BE	ACV-CSC Metea	14,565	81	O					4								7	100					
	ACLVB-CGSLB	n.d.	n.d.	O					4								7	100					
	ABVV-FGTB ACCG	n.d.	n.d.	O					4								7	100					
BG	ФНСОЛП	3,000	3	O					3								4	64					
	Podkrepa	820	0.9	SO					4								5	45					
CY	OBIEK-SEK	10	1	SO					0								1	9					
CZ	OS TOK	3,456	7	O					4								7	100					
DE	IG Metall	22,000	18	O					4								7	100					
DK	3F	2,031	38	O					4								6	91					
	HK	2,000	38	O					4								7	100					
	TL	n.d.	n.d.	O					4								7	100					
EE	ETTAF	94	1	O					1								2	27					

MS	Trade union	Sectoral workforce (number)	Sectoral workforce (%)	Domain coverage	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	Total NACE 13 subcodes	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	Total NACE 14 subcodes	Width (%)	Other sectors	All worker types	Entire country	Largest	Second largest
ES	CCOO de Industria	22,000	25	O					4								7	100					
	UGT FICA	1,707	2	O					4								7	100					
	ELA	151	0.2	SO					2								0	18					
	FI-USO	386	0.4	SO					0								6	55					
FI	Pro	1,500	25	O					4								7	100					
	Finnish Industrial Union	3,617	59	O					2								5	64					
FR	CMTE-CFTC	200	0.2	O					4								7	100					
	CFE-CGC Chimie	500	0.6	O					4								5	82					
	FO Fédéchimie	100	0.1	O					3								5	73					
	FS-CFDT	3,000	4	O					4								7	100					
	CGT-THCB	3,000	4	O					4								7	100					
HR	Sindtokg	4,000	22	O					4								6	91					
HU	BDSZ	1,412	4	O					4								5	82					

MS	Trade union	Sectoral workforce (number)	Sectoral workforce (%)	Domain coverage	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	Total NACE 13 subcodes	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	Total NACE 14 subcodes	Width (%)	Other sectors	All worker types	Entire country	Largest	Second largest
IE	SIPTU	400	13	O					2								1	27					
IT	FILCTEM	70,000	21	O					4								7	100					
	FEMCA-CISL	40,990	13	O					4								7	100					
	UILTEC-UIL	n.d.	0	O					4								7	100					
LT	LLPPS	930	3	C					4								3	64					
	LPJPS Solidarumas	890	3	O					4								7	100					
LU	OGB-L	323	n.d.	n.d.	n.d	n.d	n.d		1	n.d	n.d	n.d	n.d	n.d	n.d	n.d	0	9					
LV	LIA	100	0.8	O					1								1	18					
MT	GWU	300	65	O					2								1	27					
NL	FNV Proces-industrie	1,200	8	O					4								7	100					
	CNV Vakmensen	n.d.	n.d.	O					4								7	100					
PL	FNSZZPL	3,700	2	O					4								6	91					
PT	Fesete	20,000	14	O					4								7	100					
	SIMA	200	0.1	O					4								7	100					
	Sindeq	1,250	0.9	O					4								7	100					

MS	Trade union	Sectoral workforce (number)	Sectoral workforce (%)	Domain coverage	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	Total NACE 13 subcodes	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	Total NACE 14 subcodes	Width (%)	Other sectors	All worker types	Entire country	Largest	Second largest
RO	FNSIU Uniconf	2,500	2	C					2								1	27					
	FNS Solidaritatea Metal	160	0.1	SO					1								0	9					
	Confpeltex	500	0.3	SO					0								1	9					
SE	IF Metall	2,000	31	O					4								7	100					
	Unionen	808	12	O					4								6	91					
	Sveriges Ingenjörer	327	5	O					4								7	100					
SI	STUPIS	1,800	28	O					4								7	100					
SK	IOZ	1,063	4	O					3								3	55					
EU27	**50 TUs**		**12%**						**161**								**262**	**77**	**48 TUs**	**39 TUs**	**47 TUs**	**28 TUs**	**13 TUs**

Note: *In Cyprus, the difference in size between the two trade unions in the sector is insignificant due to very low membership. In some Member States, some trade unions are equal and therefore are both considered largest. In Hungary, HVDSZ 2000, which is not affiliated to IndustriAll Europe, claims, like BDSZ, that it is the largest trade union. HVDSZ 2000 specialises in representing disabled people, who are employed in the textile and clothing sector in large numbers (with state support). Other unions do not recognise this as a legitimate activity. n.d., no data; TU, trade union.*

Source*: *Network of Eurofound Correspondents, 2020

Table 33 looks at the involvement in sector-related collective bargaining and social dialogue (bipartite and/or tripartite), and consultation by the government on sector-related matters, among IndustriAll Europe affiliates.

The data show that the vast majority of unions that are affiliated to IndustriAll Europe are involved in collective bargaining (46 trade unions, 92%). In all Member States except Estonia and Lithuania, at least one IndustriAll Europe affiliate is involved in collective bargaining. Only four of the unions affiliated to IndustriAll Europe (in Estonia, Lithuania and Spain) are not involved in collective bargaining. The figures indicate that IndustriAll Europe affiliates are involved to a slightly higher extent in collective bargaining than the sector-related trade unions in the EU27 as a whole, 88% of which are involved in collective bargaining (see Table 17).

Some two-thirds (66%) of unions affiliated to IndustriAll Europe in the EU27 are involved either in both multi-employer (sector-level) and single-employer (company-level) collective bargaining or in multi-employer bargaining only.. This figure is slightly higher than the proportion of total sector-related trade unions involved in multi-employer collective bargaining (58%; see Table 17). Twelve IndustriAll Europe affiliates (24%) are involved in multi-employer collective bargaining only.

One-quarter of the unions affiliated to IndustriAll Europe in the EU27 (12 trade unions, 24%) are involved in single-employer collective bargaining only. This is slightly less than is found in all sector-related trade unions as a whole, where 30% are involved in single-employer collective bargaining only.

These figures suggest that trade unions involved in multi-employer collective bargaining are slightly overrepresented among IndustriAll Europe sectoral affiliates, while trade unions involved in company-level collective bargaining only are slightly underrepresented.

A total of 43 IndustriAll Europe affiliates take part in collective bargaining in NACE 13 domains (86%). NACE 14 is represented in collective bargaining by exactly the same number of unions (43 trade unions, 86%). These figures are higher than those associated with sectoral trade unions as a whole, of which 74% take part in collective bargaining in NACE 13 domains and 76% do so in NACE 14 domains.

Two-thirds (64%) of unions affiliated to IndustriAll Europe take part in collective bargaining within all NACE 13 subcodes and more than half (52%) within all NACE 14 subcodes. An average of 7.7 NACE subcodes in the textile and clothing sector are covered by collective bargaining by trade unions affiliated to IndustriAll Europe. This is higher than the equivalent figure for sector-related trade unions as a whole, which cover an average of 5.8 NACE codes (see Table 17). The data therefore indicate that IndustriAll Europe affiliates on average represent more NACE activities than sector-related trade unions in the EU27 as a whole.

Over two-thirds (68%) of trade unions affiliated to IndustriAll Europe are involved in bipartite or tripartite social dialogue. In all Member States except Cyprus, Estonia, Ireland and Malta, at least one IndustriAll Europe affiliate is involved in bipartite or tripartite social dialogue. There was no data available on the involvement of trade unions in social dialogue bodies for Bulgaria and Portugal

A majority of IndustriAll Europe affiliates (60%) are consulted by the government on sector-related matters. With the exception of six Member States (Cyprus, Czechia, Ireland, Luxembourg, Malta, Portugal), at least one trade union affiliated to IndustriAll Europe is consulted by the government in every Member State.

Apart from one (ELA in Spain), all IndustriAll Europe affiliates are involved in collective bargaining or bipartite or tripartite social dialogue or are consulted by the government on sector-related matters.

Table 33: Collective bargaining and social dialogue involvement of trade unions affiliated to IndustriAll Europe

MS	Trade union	Involvement in collective bargaining	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	Total NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	Total NACE 14 subcodes covered	Involved in bipartite and/or tripartite SD	Consulted by the government
AT	PRO-GE	Sector					4								7		
	GPA	Sector					4								7		
BE	ACV-CSC Metea	Both					4								7		
	ACLVB-CGSLB	Both					4								7		
	ABVV-FGTB ACCG	Both					4								7		
BG	ФНСОЛП	Both					3								4		
	Podkrepa	Both					4								5	n.d	n.d
CY	OBIEK-SEK	Company					0								1		
CZ	OS TOK	Both					4								7		
DE	IG Metall	Sector					4								7		
DK	3F	Both					4								6		
	HK	Both					4								7		
	TL	Sector					4								7		
EE	ETTAF	No CB					0								0		
ES	CCOO de Industria	Both					4								7		
	UGT FICA	Both					4								7	n.d.	
	ELA	No CB					0								0		
	FI-USO	Company					0								6		

MS	Trade union	Involvement in collective bargaining	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	Total NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	Total NACE 14 subcodes covered	Involved in bipartite and/or tripartite SD	Consulted by the government
FI	Pro	Sector					4								7		
	Finnish Industrial Union	Sector					4								7		
FR	CMTE-CFTC	Both					4								7		
	CFE-CGC Chimie	Both					4								5		
	FO Fédéchimie	Both					3								5		
	FS-CFDT	Both					4								7		n.d.
	CGT-THCB	Both					4								7		
HR	Sindtokg	Company					4								6		
HU	BDSZ	Company					4								5		
IE	SIPTU	Company					2								1		
IT	FILCTEM	Both					4								7		
	FEMCA-CISL	Both					4								7		
	UILTEC-UIL	Both					4								7		
LT	LLPPS	No CB*					0								0		
	LPĮPS Solidarumas	No CB					0								0		
LU	OGB-L	Company					1								0		
LV	LIA	Company					1								1		
MT	GWU	Company					1								1		
NL	FNV Proces-industrie	Both					4								7		
	CNV Vakmensen	Both					4								7		

MS	Trade union	Involvement in collective bargaining	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	Total NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	Total NACE 14 subcodes covered	Involved in bipartite and/or tripartite SD	Consulted by the government
PL	FNSZZPL	Company					1								0		
PT	Fesete	Sector					4								7	n.d.	
	SIMA	Sector					4								3	n.d.	n.d.
	Sindeq	Sector					4								7	n.d.	n.d.
RO	FNSIU Uniconf	Company					2								1		
	FNS Solidaritatea Metal	Company					1								0		
	Confpeltex	Company					0								1		
SE	IF Metall	Sector					4								7		
	Unionen	Sector					4								7		
	Sveriges Ingenjörer	Sector					4								7		
SI	STUPIS	Both					4								7		
SK	IOZ	Company					2								3		
	50 TUs	**46 involved in CB**	**36**	**37**	**35**	**41**		**36**	**36**	**38**	**35**	**33**	**29**	**35**		**EU27 34**	**30**

Note: ** Only consultation. CB, collective bargaining; n.a., not applicable; n.d., no data; SD, social dialogue; TU, trade union.*

Source: *Network of Eurofound Correspondents, 2020*

3.2. Membership domain of Euratex

There are a total of 52 employer organisations representing the textile and clothing sector in 24 Member States. Of these, 23 employer organisations are affiliated to Euratex, which is present in 19 countries (Table 34). Euratex members make up 44% of employer organisations in the sector. In 13 Member States, the largest employer organisations in the sector are affiliated to Euratex. Most of the Euratex-affiliated employer organisations are the largest or second largest organisations in their countries; in 17 Member States, the largest employer organisation is affiliated to Euratex.

In five Member States with sectoral employer organisations (Estonia, Ireland, Latvia, Malta, Slovenia), Euratex has no sector-related affiliates. In seven Member States (Czechia, Finland, Germany, Hungary, Lithuania, the Netherlands, Sweden), the only existing sectoral employer organisation is affiliated to Euratex. In one Member State (Belgium), there are multiple employer organisations in the sector, all of which belong to Euratex. In the remaining nine Member States, there are multiple employer organisations in the sector and at least one is affiliated to Euratex.

Table 34: Sector-related employer organisations and Euratex affiliation

MS	Employer organisations affiliated to Euratex	Employer organisations not affiliated to Euratex	Is the largest employer organisation affiliated to Euratex?
AT	FVTBSL	BIMBT	No
BE	Creamoda, Fedustria	None	Yes
BG	BAATPE	BATOK, BOTO	Yes
CY	None	None	n.a.
CZ	ATOK	None	Yes
DE	textil+mode	None	Yes
DK	DM&T	Tailors' Guild	Yes
EE	None	ERTL, EKL	No
EL	SEPEE, SKEE	SEVK	Yes
ES	CIE	Fedecon, AEGP	Yes
FI	Suomen Tekstiili & Muoti	None	Yes
FR	UIT, UFIMH	FHCM, UNACAC	Yes
HR	HGK UTOI	HUP UTKI	Yes
HU	MKSZ	None	Yes
IE	None	IBEC	No
IT	SMI	Confartigianato Moda, CNA Federmoda, Casartigiani, CLAAI, Uniontessile Confapi	Yes
LT	LATIA	None	Yes

MS	Employer organisations affiliated to Euratex	Employer organisations not affiliated to Euratex	Is the largest employer organisation affiliated to Euratex?
LU	None	None	n.a.
LV	None	VRUA	No
MT	None	MEA	No
NL	Modint	None	Yes
PL	PIOT	PPL, ZPPT, ZPPPT	Yes
PT	ATP, ANIL*	ANIVEC/APIV, ANIT-Lar, AICR	Yes
RO	AstricoNE (regional)	ANITR, Fepaius**	No
SE	TEKO	None	Yes
SI	None	ZDS	No
SK	None	None	n.a.
EU27	**23* employer organisations** **19 Member States**	**29 employer organisations**	**17 Member States**

Note: ** ANIL in Portugal states that it is affiliated to Euratex on its website, but is not listed on the Euratex website. The information could not be confirmed. n.a., not applicable. ** As explained in Table 11, in Romania the regional sectoral organization AstricoNE is affiliated to the national sectoral organisation* Fepaius*; in order to avoid double counting of members,* Fepaius *was not counted here as a separate employer organisation.*

Source: *Network of Eurofound Correspondents, 2020*

Table 35 examines Euratex-affiliated employer organisations from multiple perspectives: percentage of the sectoral workforce covered, number of companies covered, membership domains, NACE codes and subcodes covered, types of workers covered (only blue collar or white collar, or both) and geographical coverage (the entire country or only part of it). The table also looks at Euratex affiliates in terms of size (whether they are the largest or second largest sector-related employer organisation in their country).

The average workforce density of the 23 sectoral employer organisations affiliated to Euratex in the EU27 is 47%. This is higher than the average workforce density of all sector-related employer organisations (35%).

Half of the employer organisations affiliated to Euratex (11 employer organisations, 48%) have an overlapping membership domain; they cover both textile and the clothing manufacture, but also other sectors. Only one employer organisation represents part of the sector and also other sectors (sectional overlap). Six employer organisations (26%) represent the entire sector and no other sectors (congruence) and five employer organisations (22%) represent only part of the sector and no other sectors (sectionalism). Overall, Euratex affiliates have a fairly similar membership domain pattern to the sector-related employer organisations as a whole.

Two-thirds (61%) of the Euratex affiliates cover all NACE subcodes in the sector. This figure is significantly higher than the share of all sector-related employer organisations that cover all of the NACE subcodes (40%; see Table 19). Based on this, we can infer that Euratex affiliates are overrepresented among employer organisations that represent all NACE subcodes. Employer organisations with a medium rate of coverage of NACE subcodes (50–99%) represent only 23% of Euratex affiliates, compared with 25% for the sector-related employer organisations as a whole. Overall, we can conclude that employer organisations with full NACE subcode coverage and employer organisations with low NACE subcode coverage are overrepresented among Euratex affiliates in the sector.

The vast majority of Euratex affiliates represent all type of companies (91%) and the entire country (96%%). When compared with all employer organisations in the sector, Euratex affiliates are above average in in terms of representation of all types of companies and full geographical coverage (full company type coverage is 81% and coverage of the entire country is 90% among all sectoral employer organisations).

Most of the Euratex-affiliated employer organisations are the largest or second largest organisations in their countries (21 out of 23 employer organisations). Of these, 17 employer organisations, representing over two-thirds of Euratex affiliates, are the largest in their country.

Table 35: Euratex affiliates by types of coverage: sectoral workforce, sector-relatedness, subsectoral coverage, company types and geographical coverage

MS	Employer organisation	Company density (%)	Workforce density (%)	Domain coverage	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	NACE 13 subcodes	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	NACE 14 subcodes	NACE subcodes represented (%)	Other sectors	All types of companies	Entire country	Largest or second largest
AT	FVTBSL	26	75	O					4								7	100				2nd
BE	Creamoda	8	75 in textiles* (62 in sector)	S					4								0	36				Largest
	Fedustria	13	85 in clothing* (14 in sector)	S					0								7	64				2nd
BG	BAATPE	2	25	O					3								4	64				Largest
CZ	ATOK	30	190	O														100				Largest
DE	textil+mode	22	91	O					4								7	100				Largest
DK	DM&T	71	85	C					4								7	100				Largest
EL	SEPEE	5	45	C					4								7	100				Largest
	SKEE	3	15	S					0								6	55				2nd
ES	CIE	29	46	O					4								7	100				Largest
FI	Suomen Tekstiili & Muoti	12	90	O					4								7	100				Largest
FR	UIT	2	23	O					4								3	64				Largest
	UFIMH	1	5	SO					0								4	36				2nd

MS	Employer organisation	Company density (%)	Workforce density (%)	Domain coverage	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	NACE 13 subcodes	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	NACE 14 subcodes	NACE subcodes represented (%)	Other sectors	All types of companies	Entire country	Largest or second largest
HR	HGK UTOI	100	100	C					4								6	91				Largest
HU	MKSZ	1	25	O					4								7	100				Largest
IT	SMI	n.d.	50	C					4								7	100				Largest
LT	LATIA	2	n.d.	O					4								7	100				Largest
NL	Modint	n.d	n.d.	O					4								7	100				Largest
PL	PIOT	0	10	O					4								7	100				Largest
PT	ATP	4	26	C					4								7	100				Largest or 2nd**
	ANIL	n.d.	5	S					4								0	36				
RO		19	0	S					2								3					
SE	TEKO	310	95	C					4								7	100				Largest
EU27	**23 EOs**	**14**	**47**															**80**	**12**	**21**	**22**	

Note: *C, congruence; EO, employer organisation; n.d., no data; O, overlap, S, sectionalism; SO, sectional overlap. In the case of the two employer organisations in Belgium, workforce density was calculated for one part of the sector only (textiles or clothing). Therefore, when calculating the average sectoral density, an average workforce density of 80% in Belgium was used. ** In the case of ATP in Portugal, figures regarding the workforce employed by ATP's member companies indicate that ATP is the largest employer organisation in the sector, but, according to statistics from the Ministry of Labour, ATP's collective agreements cover fewer workers (39,000) than those signed by another sectoral employer organisation, ANIVEC/APIV (59,000). The coverage of these agreements is not direct proof of membership because these agreements are extended, but they can be understood as an indicator that ANIVEC/APIV may be larger than ATP.*

Source: *Network of Eurofound Correspondents, 2020*

Table 36 presents the involvement of Euratex-affiliated employer organisations in collective bargaining, and their participation in bipartite and/or tripartite social dialogue and in consultations organised by the government regarding sector-related matters.

Of the 23 employer organisations affiliated to Euratex, 16 are involved in collective bargaining in 13 Member States. Most of them (15) are involved in multi-employer (sector-level) collective bargaining only. Only one employer organisation (in Italy) is involved in both multi-employer and single-employer (company-level) collective bargaining. No employer organisation affiliated to Euratex is involved in only single-employer collective bargaining.

Seven of the Euratex-affiliated employer organisations are not involved in collective bargaining, the reasons for which vary from one Member State to another: in Greece, for example, social partners are deterred from signing sectoral collective employment agreements by legislation; in Croatia and Lithuania, there are no employer organisations in the strict sense, only business associations, which are not legally entitled to conduct collective bargaining.

Thirteen employer organisations conduct collective bargaining in NACE 13 subsectors. Exactly the same number conduct collective bargaining in NACE 14 domains. The proportion of Euratex affiliates covering NACE 13 and NACE 14 is in line with the proportion of all sector-related employer organisations that conduct collective bargaining. .

Seventeen Euratex affiliates are involved in bipartite and/or tripartite social dialogue at sectoral level. In all Member States with Euratex affiliates except for Greece, Croatia and Romania, employer organisations affiliated to Euratex are involved in social dialogue (full data are not available for Portugal). The vast majority of employer organisations affiliated to Euratex for which data is available are consulted by the government on sector-related matters: 94%,[16] compared with 71% among the sector-related employer organisations as a whole. All Euratex affiliates, except for AstricoNE (Romania), are involved in collective bargaining or in bipartite/tripartite social dialogue or are consulted by the government.

It can be concluded that Euratex-affiliated employer organisations' involvement in collective bargaining is similar to that of sector-related employer organisations as a whole at EU27 level. But, in contrast to the 52 sector-related employer organisations at EU27 level, the Euratex affiliates are involved to a greater extent in other forms of social dialogue, such as bipartite and/or tripartite social dialogue and sector-related public policymaking (through government consultation).

[16] There are no data for ANIL; if it is consulted, 100% of Euratex-affiliated employer organisations are consulted.

Table 36: Collective bargaining and social dialogue involvement of employer organisations affiliated to Euratex

MS	Employer organisation	Involvement in collective bargaining	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	Total NACE 13 subcodes covered	Total NACE 14 subcodes covered	Involved in bipartite and/or tripartite SD	Consulted by the government
AT	FVTBSL	Sector												4	7		
BE	Creamoda	Sector												4	0		
	Fedustria	Sector												0	7		
BG	BAATPE	Sector												3	4		
CZ	ATOK	Sector												4	7		
DE	textil+mode	Sector												4	7		
DK	DM&T	Sector												4	7		
EL	SEPEE	No CB												0	0		
	SKEE	No CB												0	0		
ES	CIE	Sector												4	7		
FI	Suomen Tekstiili & Muoti	Sector												4	7		
FR	UIT	Sector												4	3		
	UFIMH	Sector												0	4		
HR	HGK UTOI	No CB												0	0		
HU	MKSZ	No CB												0	0		
IT	SMI	Both												4	7		
LT	LATIA	No CB												0	0		
NL	Modint	Sector												4	7		
PL	PIOT	No CB												0	0		

MS	Employer organisation	Involvement in collective bargaining	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	Total NACE 13 subcodes covered	Total NACE 14 subcodes covered	Involved in bipartite and/or tripartite SD	Consulted by the government
PT	ATP	Sector												4	7		
	ANIL	Sector												4	0	n.d.	n.d.
RO	AstricoNE (regional)	No CB												0	0	n.d	n.d
SE	TEKO	Sector												4	7		
EU27	23 EOs	16 involved in CB	14 EOs	14 EOs	13 EOs	14 EOs	11 EOs	12 EOs	14 EOs	14 EOs	13 EOs	12 EOs	12 EOs			17 EOs	21 EOs

Note: *CB, collective bargaining; EO, employer organisation; n.d., no data; SD, social dialogue.*

Source: *Network of Eurofound Correspondents, 2020*

3.3. Representativeness of IndustriAll Europe and Euratex

Table 37 summarises the representativeness of IndustriAll Europe and Euratex in the textile and clothing sector, showing the numbers and shares of their respective affiliated trade unions and employer organisations.

There are 66 trade unions. At least one trade union organisation is present in all 27 Member States. Of the 66 existing trade unions, 50 (76%) are members of IndustriAll Europe. IndustriAll Europe has sector-related members in 26 Member States. Greece is the only country where no textile and clothing sector member is affiliated. IndustriAll Europe members are involved in collective bargaining in all the 24 Member States where sector-related collective bargaining takes place. Of the 57 trade unions involved in collective bargaining in the EU27, 46 (81%) are affiliated to IndustriAll Europe.

There are 52 employer organisations in the textile and clothing sector across 24 Member States. Euratex has 23 sector-related members in 19 Member States. Euratex members make up 44% of employer organisations in the sector. Of the 33 employer organisations involved in collective bargaining in 15 Member States, 16 employer organisations (48%) are affiliated to Euratex, in 14 Member States.

Table 37: Membership structures of IndustriAll Europe and Euratex

	Number of organisations	Countries with organisations	Organisations involved in CB	Countries with organisations involved in CB
All sector-related TUS	66	27	58	24 No CB in EE, EL, LT
Affiliates of IndustriAll Europe	50	26 None in EL	46	24 No CB in EE, LT
IndustriAll Europe percentage (%)	76%	96%	81%	100%
All sector-related EOs	52	24 None in CY, LU, SK	33	15 No CB in EE, EL, HR, HU, IE, LT, LV, MT, PL, RO
Affiliates of Euratex	23	19 None in CY, EE, IE, LV, MT, SI, SK	16	13 No CB in EL, HR, HU, LT, PL, RO
Euratex percentage (%)	44%	79%	48%	93%

Note: *CB, collective bargaining; EO, employer organisation; TU, trade union.*

Source: *Network of Eurofound Correspondents, 2020*

Table 38 provides more details on a country-by-country basis, illustrating the reach of IndustriAll Europe and Euratex affiliates in terms of their density in the sector and involvement in collective bargaining. The table shows only the most powerful sector-related trade unions and employer organisations (in terms of density in comparison with other national trade unions and employer organisations). In Member States with two trade unions or two employer organisations, the largest was included in the selection. In Member States with more than two trade unions or employer organisations, the largest and second largest were included. In CY, where the difference between the two trade unions is insignificant, both have been included.

IndustriAll Europe is represented in all 27 Member States, and the degree of representativeness of its affiliates at national level is generally high. In all countries except Greece, at least one of the biggest trade unions is affiliated to IndustriAll Europe. In all countries except Estonia and Lithuania, the large trade unions affiliated to IndustriAll Europe are directly involved in collective bargaining (in Estonia and Lithuania, they provide assistance and consultation to their members involved in company-level collective bargaining). Furthermore, most of the IndustriAll Europe affiliates represent employees active in one or, in most cases, both parts of the sector.

Turning to the employer organisations, at least one of the biggest organisations in the sector is affiliated to Euratex in 19Member States. None of the biggest employer organisations is affiliated to Euratex in Estonia, Ireland, Latvia, Malta or Slovenia. Except in Croatia, Greece, Hungary, Lithuania, Poland and Romania, the biggest employer organisations affiliated to Euratex are involved in collective bargaining at sector level. The vast majority of the biggest employer organisations affiliated to Euratex represent both parts of the sector. Only the Belgian organisation and one of those in France represent the textile industry only.

Table 38: Reach of the most representative sectoral organisations at national level

MS	Trade unions	Sector coverage	Collective bargaining at sector level, company level or both	Workforce density (%)	Affiliation to IndustriAll Europe	Most representative employer organisations	Sector coverage	Collective bargaining at sector level, company level or both	Company density (%)	Workforce density (%)	Affiliation to Euratex
AT	PRO-GE	Full	Sector	23	Yes	BIMBT	Full	Sector	26	75	Yes
BE	ACV-CSC Metea	Full	Both	81	Yes	Creamoda	Only textiles	Sector	8	75	Yes
	ABVV-FGTB ACCG	Full	Both	n.d.	Yes						
BG	ФНСОЛП	Full	Both	4.8	Yes	BAATPE	Full	Sector	2	25	Yes
	Podkrepa	Full	Both	1	Yes	BATOK	Full	Sector	1	20	No
CY	SEVETTYK-PEO	Only clothing	Company	2	No	None					
	OBIEK-SEK	Only clothing	Company	1	Yes						
CZ	OS TOK	Full	Both	7	Yes	ATOK	Full	Sector	0.2	19	Yes
DE	IG Metall	Full	Sector	18	Yes	textil+mode	Full	Sector	22	91	Yes
DK	3F	Full	Both	38	Yes	DM&T	Full	Sector	11	85	Yes
	HK	Full	Both	38	Yes						
EE	ETTAF	Full	No CB	1	Yes	ERTL	Full	No CB	4	n.d.	No
EL	OEKIDE	Full	No CB	9	No	SEPEE	Full	No CB	5	44	Yes
ES	CCOO de Industria	Full	Both	25	Yes	CIE	Full	Sector	29	46	Yes
	UGT FICA	Full	Both	2	Yes	Fedecon	Full	Sector	15	32	No
FI	Finnish Industrial Union	Full	Sector	59	Yes	Suomen Tekstiili & Muoti	Full	Sector	12	90	Yes

MS	Trade unions	Sector coverage	Collective bargaining at sector level, company level or both	Workforce density (%)	Affiliation to IndustriAll Europe	Most representative employer organisations	Sector coverage	Collective bargaining at sector level, company level or both	Company density (%)	Workforce density (%)	Affiliation to Euratex
FR	FS-CFDT	Full	Both	4	Yes	UIT	Full	Sector	2	23	Yes
	CGT-THCB	Full	Both	4	Yes	UFIMH	Only textiles	Sector	1	5	Yes
HR	Sindtokg	Full	Company	22	Yes	HUP UTKI	Full	No CB*	35	70	No
						HGK UTOI	Full	No CB	100	100	Yes
HU	BDSZ	Full	Company	4	Yes	MKSZ	Full	No CB	1	25	Yes
	HVDSZ 2000	Only clothing	Company	31	No						
IE	SIPTU	Full	Company	13	Yes	IBEC	Full	No CB	n.d.	n.d.	No
IT	FILCTEM	Full	Both	21	Yes	SMI	Full	Both	n.d.	50	Yes
	FEMCA-CISL	Full	Both	13	Yes	Uniontessile Confapi	Full	Sector*	n.d.	n.d.	No
LT	LLPPS	Full	No CB* (only consultation)	3	Yes	LATIA	Full	No CB*	2	n.d.	Yes
LU	OGB-L	n.d.	Company	n.d.	Yes	None					
LV	LIA	Full	Company	1	Yes	VRUA	Full	No CB	14	80	No
MT	GWU	Full	Company	65	Yes	MEA	Full	No CB	22	62	No
NL	FNV Procesindustrie	Full	Both	8	Yes	Modint	Full	Sector	n.d.	n.d.	Yes
	CNV Vakmensen	Full	Both	n.d.	Yes						
PL	FNSZZPL	Full	Company	2	Yes	PIOT	Full	No CB	0.4	10	Yes
PT	Fesete	Full	Sector	14	Yes	ANIVEC/APIV	Full	Sector	5	23	No

MS	Trade unions	Sector coverage	Collective bargaining at sector level, company level or both	Workforce density (%)	Affiliation to IndustriAll Europe	Most representative employer organisations	Sector coverage	Collective bargaining at sector level, company level or both	Company density (%)	Workforce density (%)	Affiliation to Euratex
RO	Sindeq	Full	Sector	1	Yes	ATP	Full	Sector	4	26	Yes
	FNSIU Uniconf	Full	Company	2	Yes	Fepaius	Full	No CB	3	10	No
	Confpeltex	Only clothing	Company	0.3	Yes	AstricoNE (regional)	Full	No CB	0.2	0.9	Yes
SE	IF Metall	Full	Sector	31	Yes	TEKO	Full	Sector	5	100	Yes
	Unionen	Full	Sector	12	Yes						
SI	STUPIS	Full	Both	28	Yes	ZTOUPI	Full	Sector	33	30	No
SK	IOZ	Full	Company	4	Yes	None					

Note: *CB, collective bargaining; EO, employer organisation, n.a., not applicable; n.d., no data; TU, trade union. * Not directly involved in collective bargaining, but consulted by their affiliated members.*

Source: *Network of Eurofound Correspondents, 2020*

3.4. National sectoral trade unions not represented in the ESSDC

Table 39 lists the 16 textile and clothing sector trade unions that are not affiliated to IndustriAll Europe and thus not represented in the ESSDC. Of these, 132are involved in collective bargaining. The 12 Member States for which this study has identified sectoral trade unions that are not represented in the ESSDC are Belgium, Cyprus, France, Greece, Hungary, Italy, Luxembourg, the Netherlands, Poland, Romania, Spain and Sweden.

The data indicate that sectoral representation, representation of all types of workers and coverage of the entire country tend to be slightly lower among trade unions not affiliated to IndustriAll Europe than among trade unions in the textile and clothing sector generally. While the average number of NACE subcodes covered by the 66 sectoral trade unions is seven, for the trade unions not affiliated to IndustriAll Europe it is only four.

Similarly, multisectoralism is less widespread among the unions not affiliated to IndustriAll Europe: 82% of those unions represent other sectors, compared with 92% of all the unions.

The average density for the trade unions not affiliated to IndustriAll Europe and for which data are available is 4%, compared with the 12% average density of the 66 sectoral trade unions.

Furthermore, the trade unions not affiliated to IndustriAll Europe tend to be less involved in collective bargaining and bipartite or tripartite social dialogue and less often consulted by the government on sector-related matters.

Table 39: Sectoral trade unions not affiliated to IndustriAll Europe

MS	Trade union	Representing only NACE 13, only NACE 14 or both	Number and percentage of NACE subcodes covered	Representing all types of workers	Covering entire country	Covering other sectors	Sectoral workforce (%)	CB at sector level, company level or both	Total NACE 13 subcodes covered by CB	Total NACE 14 subcodes covered by CB	Involved in bipartite or tripartite social dialogue	Consulted by the government on sector-related matters
BE	ACV-CSC CNE	Only textiles	4 (36%)	No	No	Yes	n.d.	Both	4	0	Yes	Yes
CY	SEVETTYK-PEO	Only clothing	3 (27%)	Yes	Yes	Yes	1.9	Company	0	2	No	No
EL	OEKIDE	Both	11 (100%)	No	Yes	Yes	8.8	No CB	0	0	No	No
	PSPKM	Only textiles	1 (9%)	No	Yes	Yes	0.0	No CB	0	0	No	No
ES	CIG Industria	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No CB	0	0	n.d.	n.d.
FR	FO Pharmacie	Only clothing	7 (64%)	Yes	Yes	Yes	n.d.	Both	0	7	Yes	No
	UNSA Textile	Both	7(64%)	Yes	No	No	0.2	Company		3	No	No
HU	HVDSZ 2000	Only clothing	5 (45%)	Yes	Yes	Yes	32	Company	0	3	No	Yes
	MTSZSZ	Only clothing	1 (9%)	Yes	Yes	Yes	0.2	Company	0	1	Yes	Yes
	VSZSZ – Propex MSZ	Only textiles	2 (18%)	No	No	No	0.1	Company	2	0	No	No

MS	Trade union	Representing only NACE 13, only NACE 14 or both	Number and percentage of NACE subcodes covered	Representing all types of workers	Covering entire country	Covering other sectors	Sectoral workforce (%)	CB at sector level, company level or both	Total NACE 13 subcodes covered by CB	Total NACE 14 subcodes covered by CB	Involved in bipartite or tripartite social dialogue	Consulted by the government on sector-related matters
IT	UGL Chimici	Both	11 (100%)	Yes	Yes	Yes	0.0	Sector	4	7	Yes	n.d.
LU	LCGB	n.d.	n.d.	Yes	Yes	Yes	n.d.	No CB	0	0	No	No
NL	De Unie	n.d.	n.d.	No	Yes	Yes	n.d.	Both	4	1	Yes	Yes
PL	NSZZ Solidarność	Both	2 (18%)	Yes	Yes	Yes	0.3	Company	1	0	No	No
RO	FSLR	Only clothing	2 (18%)	No	Yes	Yes	0.2	Company	0	2	No	No
SE	Ledarna	Both	11 (100%)	No	Yes	Yes	3.0	Sector	4	7	No	Yes
EU27	**16**	**Only textiles: 3 Only clothing: 5 Both: 5 No data: 4**	**Average: 5(45%)**	**All types: 852%)**	**Entire country: 12 (75%)**	**Other sectors: 13 (81%)**	**Average density for 11 TUs with data: 4%**	**Sector only: 2 (13%) Company only: 7 (43%) Both: 3 (19%) No CB: 4 (25%)**	**NACE 13 covered by 7 TUs**	**NACE 14 covered by 9 TUs**	**Involved: 5 (31%)**	**Consulted: 5 (31%)**

Note: *CB, collective bargaining; n.d., no data; TU, trade union.*

3.5. Other European trade union associations

Table 40 lists the European associations other than IndustriAll Europe with which 30 sectoral trade unions report an affiliation. None of the other European organisations claims representativeness for the textile and clothing sector. As the table shows, almost all of these sectoral trade unions are also affiliated to IndustriAll Europe. Only four of the trade unions that indicated an affiliation to another European association are not affiliated to IndustriAll Europe. These are ACV-CSC CNE from Belgium, HVDSZ 2000 from Hungary, NSZZ Solidarność from Poland and Ledarna from Sweden. The two Luxembourg trade unions indicated an affiliation to IndustriAll Europe but not for their workers in the textile and clothing sector.

It can be deduced from this assessment that IndustriAll Europe is the only European trade union representing textile and clothing sector trade unions.

In 11 Member States (Belgium, Cyprus, Greece, Hungary, France, Italy, Luxembourg, the Netherlands, Poland, Romania, Spain, Sweden), there are sector-related trade unions (some involved in collective bargaining) that are not affiliated to IndustriAll Europe. In some of these cases, the unions are members of other European cross-sectoral associations. This seems to occur mostly among trade unions with larger, multisectoral representation that are affiliated to other European trade union associations for other sectors, not for the textile and clothing sector. No trade union included in this study is affiliated to another sector-related European trade union association, and indeed none seem to exist. This overview emphasises IndustriAll Europe's status as the sector's principal labour representative at European level.

Table 40: Sector-related national trade unions affiliated to European associations other than IndustriAll Europe

MS	Trade union	Affiliation to IndustriAll Europe	Affiliation to other European trade union association
AT	PRO-GE	Yes	EFFAT
	GPA	Yes	UNI Europa, EFFAT, ETF, EFJ, EPSU
BE	ACLVB-CGSLB	Yes	EFBWW, EFFAT, ETUC, EPSU
	ABVV-FGTB ACCG	Yes	EFBWW, EFFAT, ETUC, EPSU
	ACV-CSC CNE	No	EFBWW, EFFAT, ETUC, EPSU
CY	OBIEK-SEK	Yes	EFFAT
DE	IG Metall	Yes	EFBWW
DK	3F	Yes	EFBWW, EPSU
	HK	Yes	EFBWW
ES	CCOO de Industria	Yes	EFFAT, EFBWW
	UGT FICA	Yes	EFFAT, EFBWW, EPSU
	ELA	Yes	ETUC, EFBWW, ELA
	FI-USO	Yes	EFFAT
FI	Pro	Yes	EFBWW, EFFAT

MS	Trade union	Affiliation to IndustriAll Europe	Affiliation to other European trade union association
	Finnish Industrial Union	Yes	EFBWW, EFFAT
FR	CFE-CGC Chimie	Yes	FECCIA
HR	Sindtokg	Yes	ETUC
HU	HVDSZ 2000	No	EPSU, UNI
IE	SIPTU	Yes	EPSU, EFBWW
IT	FILCTEM	Yes	EPSU
	FEMCA-CISL	Yes	EPSU
LU	LCGB	No (not for the textile and clothing sector)	ETUC
	OGB-L	Yes	EFFAT, ETUC
LV	LIA	Yes	EFFAT
MT	GWU	Yes	ETUC, EFFAT, EFBWW, EPSU
NL	FNV Procesindustrie	Yes	ETUC, EFBWW
	CNV Vakmensen	Yes	ETUC, EUCDW, EZA, EFBWW, EPSU
PL	NSZZ Solidarność	No	EPSU
SE	Unionen	Yes	EFBWW, EFFAT
	Ledarna	No	FECCIA

Source: *Network of Eurofound Correspondents, 2020*

IndustriAll Europe is the only sector-related trade union at EU level. Several trade unions from the textile and clothing sector are affiliated to other EU-level trade unions active in other sectors. In most cases, the trade unions affiliated to these associations are also affiliated to IndustriAll Europe.

Table 41: Other European associations with national sectoral trade union organisations as members

Short name	Full name	Assessment of sector-relatedness	Member States with an affiliate according to organisation website	Member States with a textile and clothing sector affiliate included in this study
EFFAT	European Federation of Trade Unions in the Food, Agriculture, and Tourism Trade Unions	Food, agriculture, tourism and domestic work	26 Member States	8 Member States (AT, CY, ES, FI, LU, LV, MT, SE) the trade unions from 8 are also affiliated to IndustriAll Europe (AT, CY, ES, FI, LU, LV, MT, SE)
EFBWW	European Federation of	Building, woodworking,	27 Member States	8 Member States (BE, DE, DK, ES, FI, IE, MT, NL, SE; the trade unions from 8 (BE, DE, ES, FI, IE,

Short name	Full name	Assessment of sector-relatedness	Member States with an affiliate according to organisation website	Member States with a textile and clothing sector affiliate included in this study
	Building and Woodworkers	forestry and allied industries, and trade		NL, PL, SE) are also affiliated to IndustriAll Europe
EFJ	The European Federation of Journalists	Mass media	27 Member States	1 Member State (AT); the trade union is also affiliated to IndustriAll Europe
EPSU	European Public Sector Union	Health and social services, public administration, waste, water, energy	27 Member States	10 Member States (AT, BE, DK, ES, HU, IE, IT, MT, NL, PL); the trade unions from 8 (AT, BE, DK, ES, IE, IT, MT, NL) are also affiliated to IndustriAll Europe
ETF	European Transport Workers' Federation	Civil aviation, road transport, tourism, maritime transport, railways, logistics	27 Member States	1 Member State (AT); the trade union is also affiliated to IndustriAll Europe
ETUC	European Trade Union Confederation	Cross-sectoral European umbrella organisation	27 Member States	5 Member States directly affiliated to IndustriAll Europe (BE, ES, LU, MT, NL); in 1 Member State (LU) one trade union is not affiliated to IndustriAll
EUCDW	European Union of Christian Democratic Workers	Cross-sectoral organisation	15 Member States	1 Member State (NL); the trade union is affiliated to IndustriAll Europe
EZA	European Centre for Workers' Questions	Cross-sectoral organisation	23 Member States	1 Member State (NL); the trade union is affiliated to IndustriAll Europe
FECCIA	European Federation of Managerial Staff in the Chemical and Allied Industries	Chemical sector	7 Member States	2 Member States (FR, SE); 1 trade union (FR) is also affiliated to IndustriAll Europe

Short name	Full name	Assessment of sector-relatedness	Member States with an affiliate according to organisation website	Member States with a textile and clothing sector affiliate included in this study
UNI Europa	UNI Europa	Cross-sectoral organisation	27 Member States	2 Member States (AT, HU); in 1 Member State (HU) the trade union is not affiliated to IndustriAll; no data for other Member States

Source: *Compiled by the authors based on information from the Network of Eurofound Correspondents, 2020*

3.6. National sectoral employer organisations not represented in the ESSDC

Table 42 lists 29 textile and clothing sector employer organisations that are not affiliated to Euratex, and thus not represented in the ESSDC. Of these,15 are involved in collective bargaining. Employer organisations not affiliated to Euratex can be found in 16 Member States: Austria, Bulgaria, Croatia, Denmark, Estonia, France, Greece, Ireland, Italy, Latvia, Malta, Poland, Portugal, Romania, Slovenia and Spain. The table outlines the main characteristics of the employer organisations that are not affiliated to Euratex.

Table 42: Sectoral employer organisations not affiliated to Euratex

MS	Employer organisation	Representing only NACE 13, only NACE 14 or both	Number and percentage of NACE subcodes covered	Representing all types of companies	Covering entire country	Covering other sectors	Sectoral workforce (%)	Company density (%)	CB at sector level, company level or both	Total NACE 13 subcodes covered by CB	Total NACE 14 codes covered by CB	Involved in bipartite or tripartite SD	Consulted by the government on sector-related matters
AT	BIMBT	Both	10 (91%)	No	Yes	Yes	25	72	Sector	3	7	Yes	Yes
BG	BATOK	Both	10 (91%)	Yes	Yes	Yes	20	1	Sector	n.d.	n.d.	Yes	Yes
DK	Tailors' Guild	Only clothing	7 (64%)	No	Yes	No	15	5	Sector	0	7	Yes	No
EE	ERTL	Both	9 (82%)	Yes	Yes	Yes	n.d.	4	No CB	0	0	No	Yes
	EKL	Only clothing	2 (18%)	Yes	Yes	Yes	0.3	0.5	No CB	0	0	No	Yes
EL	SEVK	Only textiles	5 (45%)	Yes	Yes	No	n.d.	2	No CB	0	0	No	Yes
ES	Fedecon	Both	7 (64%)	Yes	Yes	No	32	15	Sector	1	6	Yes	Yes
	AEGP	Only textiles	4 (36%)	No	Yes	No	21	1	Sector	4		Yes	No
FR	FHCM	Only textiles	5 (45%)	Yes	No	Yes	n.d.	0	Sector	0	5	Yes	No
	UNACAC	Both	5 (45%)	No	Yes	No	0.05	1	Sector	0	5	No	No
HR	HUP UTKI	Both	9 (82%)	Yes	Yes	Yes	70	35	Company*	0	0	Yes	Yes
IE	IBEC	Both	3 (27%)	Yes	Yes	Yes	n.d.	n.d.	No CB	0	0	No	No
IT	Confartigianato Moda	Both	11 (100%)	No	Yes	Yes	n.d.	18	Sector*	4	7	Yes	Yes

MS	Employer organisation	Representing only NACE 13, only NACE 14 or both	Number and percentage of NACE subcodes covered	Representing all types of companies	Covering entire country	Covering other sectors	Sectoral workforce (%)	Company density (%)	CB at sector level, company level or both	Total NACE 13 subcodes covered by CB	Total NACE 14 codes covered by CB	Involved in bipartite or tripartite SD	Consulted by the government on sector-related matters
	CNA Federmoda	Both	11 (100%)	Yes	Yes	Yes	15	n.d.	Both	4	7	Yes	Yes
	Casartigiani	Both	11 (100%)	Yes	Yes	Yes	n.d.	n.d.	Sector*	4	7	Yes	Yes
	CLAAI	Both	11 (100%)	Yes	Yes	Yes	n.d.	n.d.	Sector*	4	7	Yes	Yes
	Uniontessile Confapi	Both	11 (100%)	Yes	Yes	Yes	n.d.	n.d.	Sector*	4	7	Yes	Yes
LV	VRUA	Both	11 (100%)	Yes	Yes	Yes	80	14	No CB	0	0	No	No
MT	MEA	Both	4 (36%)	Yes	Yes	Yes	62	22	No CB	0	0	No	No
PL	PPL	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No CB	0	0	n.a.	n.d.
	ZPPT	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No CB	0	0	n.a.	n.d.
	ZPPPT	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No CB	0	0	n.a.	n.d.
PT	ANIVEC/APIV	Both	11 (100%)	Yes	Yes	Yes	23	5	Sector	4	7	No	Yes
	Anit-Lar	Only textiles	4 (36%)	Yes	Yes	No	1	n.d.	Sector	4	0	n.d.	n.d.
	AICR	n.d.	n.d.	Yes	Yes	No	1	n.d.	Sector	n.d.	n.d.	n.d.	n.d.
RO	ANITR	n.d.	n.d.	Yes	Yes	No	n.d.	3	No CB	n. d.	n. d.	n.d.	n.d.
	Fepaius	Both	11 (100%)	Yes	Yes	No	10	3	No CB	n.a.	n.d	Yes	Yes
SI	ZDS	Both	11 (100%)	Yes	Yes	Yes	40	28	Sector	4	7	Yes	Yes
	ZTOUPI	Both	8 (73%)	Yes	Yes	Yes	30	33	Sector	4	7	Yes	Yes
EU27	**29 EOs**	**Both: 18 EOs (62%)**	**Average: 8**	**All types of companies:**	**Entire country:**	**Other sectors:**	**Average density: 26%**	**Average density: 14%**	**Involved: X18**	**NACE 13 covered**	**NACE 14 covered**	**Involved: 15 EOs (52%)**	**Consulted: 55 EOs (55%)**

MS	Employer organisation	Representing only NACE 13, only NACE 14 or both	Number and percentage of NACE subcodes covered	Representing all types of companies	Covering entire country	Covering other sectors	Sectoral workforce (%)	Company density (%)	CB at sector level, company level or both	Total NACE 13 subcodes covered by CB	Total NACE 14 codes covered by CB	Involved in bipartite or tripartite SD	Consulted by the government on sector-related matters
		Only textiles: 4 EOs (14%) **Only clothing: 2 EOs (7%)** **No data: 5 Eos (17%)**		**21 EOs (72%)**	**25 EOs (86%)**	**17 EOs (59%)**				**by 12 EOs**	**by 14 EOs**		

Note: ** Only providing assistance. CB, collective bargaining; EO, employer organisation; n.a., not applicable; n.d., no data.*

Source: *Network of Eurofound Correspondents, 2020*

3.7. Other European employer organisation associations

There are 14 national textile and clothing sector employer organisations that report an affiliation to another European association (see Table 43). Five are also affiliated to Euratex; the remaining nine are affiliated not to Euratex but to another European association.

In 16 Member States (Austria, Bulgaria, Croatia, Denmark, Estonia, France, Greece, Italy, Ireland, Latvia, Malta, Poland, Portugal, Romania, Slovenia, Spain), there is at least one employer organisation (some of which are involved in collective bargaining) that is not affiliated to Euratex. In some of these cases, the organisations are members of other European sectoral or cross-sectoral organisations. Most of the sectoral employer organisations and business associations have few or no affiliations to European associations other than Euratex, which emphasises the status of Euratex as the sector's primary employer representative.

Table 43: Sector-related national employer organisations/business associations affiliated to European associations other than Euratex

MS	Employer organisation	Affiliation to Euratex	Affiliation to other European employer organisation association
AT	BIMBT	No	CELC
BE	Fedustria	Yes	CELC
DK	DM&T	Yes	Yes (n.d.)
EE	EKL	No	Fur Europe
EL	SEVK	No	EuroCotton
ES	CIE	Yes	Textile ETP
HU	MKSZ	Yes	Cotance, CELC
IE	IBEC	No	Business Europe
IT	SMI	Yes	CELC
	CNA Federmoda	No	SMEunited
LV	VRUA	No	CELC*
MT	MEA	No	CEEP
PT	ANIL	Yes**	Yes**
SI	ZDS	No	BusinessEurope

Note: ** Cooperation rather than affiliation. ** According to the ANIL website.*

Source: *Network of Eurofound Correspondents, 2020*

It can be concluded that there are no sector-related European employer organisations other than Euratex, apart from EuroCotton and Fur Europe, which are affiliated to Euratex, and Textile ETP, which is a professional association of which Euratex is a governing board member. Table 44 provides a more detailed analysis of the other associations with which sectoral employer organisations are affiliated.

Table 44: Other European associations with national sectoral employer organisations/business associations as members

Short name	Full name	Assessment of sector-relatedness	Member States with an affiliate according to organisation website	Member States with a textile and clothing sector affiliate included in this study	Other relevant inform-ation
BusinessEurope	Confederation of European Business	Cross-sectoral organisation	26 Member States (all except SK)	1 Member States (SI); direct affiliation, not affiliated to Euratex	
CEEP	European Centre of Employers and Enterprises providing Public Services and Services of general interest	Cross sectoral lobby organisation	14 Member States (AT, BE, BG, DE, DK, EL, ES, FI, FR, IT, MT, PL, PT, SE)	1 Member State (MT); not affiliated to Euratex	
CELC	European Confederation of Flax and Hemp	Confederation of employer organisations/ companies specialising in production and transformation of linen and hemp	13 Member States (AT, BE, CZ, DE, ES, FI, FR, HU, IT, LT, NL, PL, PT)	3 Member States (AT, BE, IT); employer organisations in 2 Member States affiliated to Euratex (BE, IT)	
Cotance	European Confederation of the Leather Industry	No data	11 Member States (AT, DE, DK, ES, FR, HU, IT, NL, PT, RO, SE)	1 Member State (HU); not affiliated to Euratex	

Short name	Full name	Assessment of sector-relatedness	Member States with an affiliate according to organisation website	Member States with a textile and clothing sector affiliate included in this study	Other relevant inform-ation
EuroCotton	European Cotton Industries Association	No data	No data	1 Member State (EL); not affiliated to Euratex. No data for other Member States	Member of Euratex
Fur Europe	Fur Europe	Covers all parts of the fur sector including farmers, feed kitchens, auction houses, dressers and dyers, furriers, manufacturers, designers and retailers	No data	1 Member State (EE); not affiliated to Euratex. No data for other Member States	Member of Euratex
SMEunited	Association of Crafts and SMEs in Europe	Covers SMEs in construction, retail, food and transport	No data	1 Member State (IT); not affiliated to Euratex	
Textile ETP	European Technology Platform for the Future of Textiles and Clothing	Professional association of companies, researchers and other textile professionals	No data	1 Member State (ES); affiliated to Euratex. No data for other Member States	Euratex has 16 members on the governin g board

Source: *Complied by the authors based on information from the Network of Eurofound Correspondents, 2020*

3.8. Summary of countries with largest sectoral workforce

Table 45 looks at IndustriAll Europe and Euratex membership in the nine countries with the largest textile and clothing workforce in absolute numbers.

In all nine countries, at least one organisation is affiliated to IndustriAll Europe and involved in collective bargaining (where collective bargaining exists in the sector).

Euratex has affiliated employer organisations in all nine countries. In Romania, only a regional employer organisation is affiliated, which is not involved in sectoral collective bargaining. In Poland, Euratex has an affiliated employer organisation, but it is not involved in collective bargaining. In seven of the nine countries with the largest workforce in absolute numbers, at least one Euratex affiliate is involved in collective bargaining.

Table 45: IndustriAll Europe and Euratex affiliations in Member States with sectoral employment in excess of 50,000 people

MS	Total workforce, 2018	At least one trade union affiliated to IndustriAll Europe	At least one IndustriAll Europe affiliate involved in collective bargaining	At least one employer organisation affiliated to Euratex	At least one Euratex affiliate involved in collective bargaining
IT	328,365	Yes	Yes	Yes	Yes
RO	161,060	Yes	Yes	Yes (regional organisation)	No
PL	159,363	Yes	Yes	Yes	No
PT	138,915	Yes	Yes	Yes	Yes
DE	124,763	Yes	Yes	Yes	Yes
BG	99,412	Yes	Yes	Yes	Yes
ES	89,067	Yes	Yes	Yes	Yes
FR	82,726	Yes	Yes	Yes	Yes
CZ	51,456	Yes	Yes	Yes	Yes

Sources: *Structural Business Statistics for workforce data; Network of Eurofound Correspondents, 2020, for information on affiliations*

Table 46 examines IndustriAll Europe and Euratex membership in the nine Member States in which the textile and clothing sector accounts for at least 1% of total national employment.

IndustriAll Europe has affiliates in all nine of these Member States. In seven, IndustriAll Europe affiliates are involved in sector-related collective bargaining. Affiliated trade unions in Lithuania and Estonia are not directly involved in collective bargaining, but they provide assistance and support to their members that are involved in collective bargaining at company level.

Euratex has affiliated members in seven of the Member States with the largest shares of national employment, but its affiliates are involved in collective bargaining only in four of the nine Member States in this group.

Table 46: IndustriAll Europe and Euratex affiliations in Member States in which the textile and clothing sector accounts for more than 1% of employment

MS	Share of total employment (%)	At least one trade union affiliated to IndustriAll Europe	At least one IndustriAll Europe affiliate involved in collective bargaining	At least one employer organisation affiliated to Euratex	At least one Euratex affiliate involved in collective bargaining
BG	3.1	Yes	Yes	Yes	Yes
PT	2.8	Yes	Yes	Yes	Yes
LT	2.0	Yes	No	Yes	No
RO	1.8	Yes	Yes	Yes	No
EE	1.5	Yes	No	No	No
IT	1.3	Yes	Yes	Yes	Yes
LV	1.3	Yes	Yes	No	No
CZ	1.0	Yes	Yes	Yes	Yes
HR	1.0	Yes	Yes	Yes	No

Sources: *Structural Business Statistics for workforce data; Network of Eurofound Correspondents, 2020, for information on affiliations*

3.9. Capacity to negotiate

IndustriAll Europe was founded in June 2012 by decision of the affiliates of the EMF, EMCEF and ETUF-TCL. ETUF-TCL represented workers in the ESSDC for the textile and clothing sector before 2012. When the EMF, EMCEF and ETUF-TCL decided to join forces as IndustriAll Europe, IndustriAll Europe automatically became a member of ESSDC as a successor organisation.

IndustriAll Europe has 25 staff members, of whom 2 are regularly involved in activities related to European sectoral social dialogue in the textile and clothing sector. In terms of autonomy, 95% of IndustriAll Europe's budget is drawn from membership fees from its member organisations. It has a website with a members-only section in which it shares internal documents regarding meetings, policy and consultations, and which also contains databases for internal use.

IndustriAll Europe promotes social dialogue at all levels in its statutes. It acts as an agenda setter within sectoral social dialogue and promotes joint strategies for the sustainable development of the textile and clothing sector. Aside from this, involvement in European sectoral social dialogue is not explicitly mentioned in its statutes, but it is indirectly referred to in article 29 of the statutes on sector activities and in appendix 3 listing the sectors, and it is clearly indicated by other documentation, including its website.[17] On this basis, IndustriAll Europe is not equipped with an explicit permanent statutory mandate to negotiate on behalf of its members on matters relating to European social dialogue.

[17] See, for example, the following page: https://news.industriall-europe.eu/p/social-dialogues

Rather, IndustriAll Europe's statutes (article 21m and appendix II) provide for detailed mandate procedures in relation to the nominations for the ESSDCs in various sectors. According to Appendix II of the statutes:

> *All affiliates concerned can nominate members depending on the numbers of mandates in the working groups and plenary of the [ESSDC]. The delegation shall be composed taking into account sectoral and regional representativeness. The final delegation shall be submitted by the Secretariat to the Executive Committee for approval.*

Moreover, the appendix also stipulates the procedures for deciding on platforms and agreeing on statements as part of sectoral social dialogue, obliging the ESSDC members to 'propose and prepare possible platforms and statements in close cooperation with the Secretariat' of IndustriAll Europe. In doing so, the 'members of the [ESSDC] shall act in line with the policies and procedures as agreed by the Executive Committee and Congress', the highest bodies within the European federation, in order to guarantee the participation of all national member unions in matters of the European social dialogue.

With regard to the internal mandate procedure for negotiations in the framework of sectoral social dialogue, the Secretariat is responsible for informing the Executive Committee and the ESSDC about the possibility of entering into negotiations, while the 'Executive Committee shall decide whether negotiations should take place'. At the suggestion of the Secretariat, 'The decision on the platform for negotiations and the delegation shall be taken by the Executive Committee in consultation with all the affiliates possibly via a written procedure and by a two-thirds majority.'

IndustriAll Europe has, thus, a well-defined procedure for obtaining a mandate and getting European sectoral social dialogue texts approved by its member organisations. It has the capacity to negotiate binding agreements, such as the NEPSI agreement,[18] which, however, does not cover workers in the textile and clothing sector. No binding European sectoral social dialogue agreements have yet been reached specifically for the textile and clothing sector.

Euratex was established in 1996, when three textile industry associations merged. These three organisations were the Coordination Committee for the Textile Industries of the European Community (Comitextil), European Largest Textile and Apparel Companies (ELTAC) and the European Association of Clothing Industries (ECLA). Since 2008, Euratex has been registered with the EU Transparency Register, and in 2010 it became an international non-profit organisation. With the appointment of a new director-general in 2019, Euratex has undergone a shift in its policy profile, membership, statutes, offices and team. The objectives of the organisation, as described in Article 3 of its 2021 statutes, are to represent the textile and clothing industry at EU level and promote competitiveness through advocacy and lobbying, networking, visibility and programmes of common interest. Euratex's involvement in European sectoral social dialogue is not explicitly mentioned in the statutes. Article 4 of the Euratex statutes specifies three types of members: full members, corresponding members and partners. The full members are textile and clothing trade associations and employer organisations from the EU Member States and EFTA countries, while associations and organisations from other European countries are

[18] This is the agreement on protection of workers' health through the good handling and use of crystalline silica and products containing it.

corresponding members. Partners are companies that are members of an existing full member or companies from a country that is not yet represented by a full member.

In terms of the organisational autonomy, Euratex has an office in Brussels with 12 staff members, of whom 4 are regularly involved in European social dialogue activities in the textile and clothing sector. About 85% of the Euratex budget comes from membership fees and about 13% from EU-funded projects. Euratex has a website, with a members-only section for communication on working groups and meeting invitations.

Within Euratex, a social dialogue working group prepares positions (as set out in Article 6C of its internal regulations) to support the activities of the ESSDC. The internal regulations provide mechanisms for mandating, decision-making and commitment of affiliated organisations. Article 6E of the internal regulations, provides that

> *once a position is adopted at the appropriate level, each individual member is expected to respect that common position, while it can still advocate its own position in its own name. In case of disagreement on a policy position, a minority of members can request a 'minority position' which shall be mentioned as a footnote in all communication on the matter.*

These internal regulations do not specifically mention decision-making on joint positions or agreements in the framework of European social dialogue, but they can be applied to it. **As such Euratex does have formalised procedures supporting its capacity to negotiate.** The Director-General can sign texts or approve initiatives based on consultations within the relevant working group.

The recent joint statement on the impact of COVID-19 on the textile and clothing sector, for example, was followed up within Euratex by a task force on the COVID-19 crisis, although other working groups were also consulted on the draft joint statement. Through the meetings of these working groups, member organisations were kept informed throughout the negotiation process, while a final decision to approve the text was taken within Euratex's social dialogue working group. Subsequently, the Director-General signed off the joint opinion.

3.10. Effective participation

In 2018, plenary meetings of the textile and clothing sector ESSDC took place in April and November, while in 2019 the meetings were held in July and December. In 2018, employer organisations were present from Belgium, Finland and France. In 2019, employer organisations were present from Belgium, Greece, Hungary, Italy and Spain. Trade unions from Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Hungary, Portugal and Spain sent representatives in 2018. In 2019, there was trade union participation from Bulgaria, Italy, Lithuania and the Netherlands, but not from Germany.

Table 44: Effective participation in the ESSDC for the textile and clothing sector, 2018–2019

14 Member States with trade union participation in the ESSDC	AT, BE, BG, CZ, DE, DK, ES, FI, FR, HU, IT, LT, NL, PT
12 Member States for which IndustriAll Europe has affiliated sectoral trade unions but no participants in the ESSDC	CY, EE, HR, IE, LU, LV, MT, PL, RO, SE, SI, SK
7 Member States with employer organisation participation in the ESSDC	BE, EL, ES, FI, FR, HU, IT
12 Member States for which Euratex has affiliated sectoral employer organisations but no participants in the ESSDC	AT, BG, CZ, DE, DK, HR, LT, NL, PL, PT, RO, SE

Note: *This analysis takes into account two meetings in 2018 (on 20 April and 8 November) and two meetings in 2019 (on 9 July and 10 December).*

Source: *Eurofound and the European Commission*

IndustriAll Europe has affiliated textile and clothing sector trade unions in 26 of the 27 Member States. For Greece there is no affiliate. IndustriAll Europe has member organisations in 12 Member States that did not participate in ESSDC meetings in 2018 or 2019, namely Croatia, Cyprus, Estonia, Ireland, Latvia, Malta, Poland, Romania, Slovakia, Slovenia and Sweden.

Euratex has affiliated textile and clothing sector employer organisations in 19of the 24 Member States in which there are sectoral employer organisations. Euratex has member organisation in twelve Member States that did not participate in any ESSDC meeting in 2018 or 2019, namely Austria, Bulgaria, Croatia, Czechia, Denmark, Germany, Lithuania, the Netherlands, Poland, Portugal Romania and Sweden.

4. Conclusions

There were nearly 1,500,000 employees in the textile and clothing sector in 2018, which corresponds to 0.8% of the entire EU workforce. A large majority of the EU textiles workforce (over 80%) is employed in the eight Member States with more than 80,000 employees in the sector: Italy, Romania, Poland, Portugal, Germany, Bulgaria, Spain and France. Table 4 illustrated that 22.5% of the EU textiles workforce is employed in Italy, 11% in Romania, 10.9% in Poland, 9.5% in Portugal, 8.5% in Germany and 6.8% in Bulgaria.

The proportion of the national workforce employed in the textile and clothing sector is highest in Bulgaria (3.2%), Portugal (3%), Lithuania (2.1%) and Romania (1.9%). In a further three countries, at least 1.5% of the national workforce is employed in the textile and clothing sector: Italy, Latvia and Estonia. In all the other Member States, 1% or less of the national workforce is employed in the sector.

The sector is characterised by the prevalence of small companies employing fewer than 10 people; in the EU27, almost 87% of companies in the sector employ between 0 and 9 workers. In total, microenterprises employ 21% of the sector's workforce. While only 1% of employers are large companies (more than 250 employees), they employ 21% of the workforce.

Of 66 sector-related trade unions, 50 are affiliated to **IndustriAll Europe**.[19] IndustriAll Europe-affiliated trade unions can be found in 26 Member States, with Greece being the exception. In all but three Member States (Cyprus,[20] Greece and Poland) the largest trade unions are affiliated to IndustriAll Europe.

There are 16 textile and clothing sector trade unions that are not affiliated to IndustriAll Europe and therefore not represented in the ESSDC. Of them, 12 are involved in collective bargaining. Sectoral trade unions that are not represented in the ESSDC can be found in 12 Member States: Belgium, Cyprus, France, Greece, Hungary, Italy, Luxembourg, the Netherlands, Poland, Romania, Spain and Sweden.

Of the 30 sectoral trade unions that report an affiliation to another European association, only 4 are not represented by IndustriAll Europe in the ESSDC. In addition, none of the other European associations with affiliated sectoral trade unions claims to represent the sector. This means that IndustriAll Europe is the only European trade union organisation representing the textile and clothing sector. IndustriAll Europe has a proven capacity to negotiate.

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

There are 29 textile and clothing sector employer organisations that are not affiliated to Euratex, and thus not represented in the ESSDC. Of them, 17 are involved in collective bargaining. This study has identified sectoral employer organisations not affiliated to Euratex in 16 Member States: Austria,

[19] Four of which, in Denmark and Poland, are affiliated indirectly (through an umbrella organisation).
[20] In Cyprus, the difference between the two trade unions is very small, due to very low membership.

Bulgaria, Croatia, Denmark, Estonia, France, Greece, Ireland, Italy, Latvia, Malta, Poland, Portugal, Romania, Slovenia and Spain.

There are 14 national textile and clothing sector employer organisations that report an affiliation to another European association. Of them, five are represented by Euratex. The remaining nine are affiliated not to Euratex but to another European association. The other European associations with affiliated textile employer organisations are CELC, Cotance, EuroCotton, Fur Europe, SME United and Textile ETP. Euratex is, therefore, not the only organisation representing employer organisations in the textile and clothing sector.

Euratex is, however, clearly the most representative European employer organisation for the textile and clothing sector. Euratex has a proven capacity to negotiate joint opinions. A specific clause in its internal regulations ensures the commitment of affiliated organisations to agreed positions.

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Annex 1: Additional tables and figures

Table 47: Social dialogue texts concluded at European level, 1994–2020

Date	Topic	Type	Title	Signed by IndustriAll Europe and Euratex	Signed by any other organisation Which one?
16/06/1994	Gender equality	Guidelines addressed to national organisations	Joint opinion on improved access to vocational training for women in the textile and clothing sector	Euratex ETUF-TCL	
10/07/1997	Employment	Joint opinion addressed to European institutions/National authorities	Joint declaration of Euratex and ETUC-TCL on employment in the textile and clothing sector in Europe	Euratex ETUF-TCL	
11/07/1997	Working conditions	Code of conduct	A charter by the social partners in the European textile and clothing sector. Code of conduct	Euratex ETUF-TCL	
13/07/1998	Working conditions	Joint opinion addressed to European	Letter to Mr Santer and Mr Flynn on the Communication of the Commission on non-declared work	Euratex ETUF-TCL	

Date	Topic	Type	Title	Signed by IndustriAll Europe and Euratex	Signed by any other organisation Which one?
29/03/1999	Social dialogue	Procedural text	Rules of procedures for the sectoral dialogue committee in the textile and clothing sector	ETUF-TCL	
01/06/1999	Employment	Joint opinion addressed to European institutions/National authorities	Follow up of sectorial social dialogue of textile-clothing and footwear	Euratex ETUF-TCL	CEC
20/12/1999	Social aspects of Community policies	Joint opinion addressed to European institutions/National authorities	Joint declaration by the social partners in the textile and clothing sector on the sectoral dimension of the observatory on industrial change	Euratex ETUF-TCL	
18/02/2000	Gender equality	Tool for national organisations	Equal opportunities: Vade mecum. Best practices in the textile and clothing industry	Euratex ETUF TCL	
01/03/2000	Employment	Joint opinion	Lisbon Summit: contribution of textile and clothing social partners	Euratex ETUF-TCL	
05/06/2000	Social aspects of Community policies	Joint opinion addressed to European institutions/National authorities	Social action programme	Euratex ETUF-TCL	

Date	Topic	Type	Title	Signed by IndustriAll Europe and Euratex	Signed by any other organisation Which one?
01/01/2005	Public procurement	Tool for European institutions/National authorities	Public procurement awarding guide for the Clothing-Textile sector	Euratex ETUF-TCL	ETUF-TCL
01/05/2008	Resructuring	Tool for national organisations	Restructuring recommendations: how to secure better anticipation and management of industrial change and sectoral restructuring		Syndex, Cedac
09/07/2020	Economic and/or sectoral policies	Joint opinion addressed to European institutions/National authorities	Joint declaration on the economic impact of COVID-19 on the textile, clothing, leather and footwear industries	Euratex IndustriAll Europe	
04/07/2022	Economic and/or sectoral policies	Joint opinion	Joint declaration on the EU Textile Strategy, covering resilience, skills, digitalisation, social dimension	Euratex IndustriAll Europe	

Source: *European Commission social dialogue texts database*

Table 48: Main characteristics of employment in the sector and challenges for organising

MS	Main form of employment	How difficult is it to organise workers?
AT	Standard employment prevails. Female and blue-collar employees prevail.	Organising workers is rather difficult, because there are few works councils in the sector. Large numbers of temporary agency workers, cross-border workers and migrant workers also make organising workers difficult.
BE	No data.	No data.
BG	Standard forms of employment prevail, but there is also a high prevalence of home workers, most of whom are informal. There are various forms of employment: full-time, temporary contracts, part-time.	Difficulties are reported in organising young people. The unionisation of workers is reported (by one trade union) to be difficult due to lack of social dialogue at sectoral level and resistance on the part of employers, and because of companies with unregulated work, low pay, temporary contracts and precarious jobs.
CY	There is little information about the sector; standard employment prevails, but there is also self-employment.	The unionisation rate and collective bargaining representation are low.
CZ	Full-time standard employment is prevalent. However, there is also a significant self-employed workforce, especially in NACE 14.	It is easier to organise employees in long-standing medium and large companies than in SMEs and new companies. There can be rivalry among trade unions in the workplace, although this is not common.
DE	Standard employment prevails. Mini-jobs (short-term part-time contracts) represent about 10% of total employment.	The textile subsector is better organised than the clothing subsector. Textile manufacture is very productive, export-orientated and highly profitable because of high-tech production and links to the automotive and chemical industries. Textile manufacture is also highly organised due to formal labour contracts. Clothing is under significant pressure from imports and is characterised by outsourcing and offshoring.
DK	There are few self-employed workers and temporary agency workers. Most employees, both full- and part-time, are paid an hourly wage in a permanent job.	The sector is well organised; there are no particular problems.
EE	Standard employment is prevalent, followed by temporary agency work.	There is a lack of interest in collective bargaining, especially in SMEs, where it is easier for employees to come to an agreement with management without any formal or written agreement.

MS	Main form of employment	How difficult is it to organise workers?
EL	In the clothing subsector, outsourcing of work through the *façon* system is widespread. Self-employed people without employees represent about 20% of employment in the sector.	The lack of sectoral collective employment agreements has hindered the collective organisation of employees for many years. The vast majority of companies in the sector in general, and in the clothing subsector in particular, are small or very small, sizes in which it is difficult to organise unions. The considerable number of immigrant workers in the clothing subsector and the amount of undeclared work are serious obstacles to organising.
ES	The rates of self-employment and temporary employment are high. The majority of the workforce is concentrated in manufacture of other textiles and leather clothes.	The sector is marked by temporary employment in medium-sized companies, making high rates of unionisation difficult.
FI	Standard forms of employment predominate. Some employees have fixed-term contracts but most have permanent contracts. The use of temporary agency work is not common.	The most significant challenge is the outsourcing of some production processes to countries with lower costs of labour. As a result, the number of production workers is decreasing, while that of white-collar employees is on the rise.
FR	Permanent employment contracts are prevalent. The use of fixed-term contracts and temporary workers is comparable to other sectors. A majority (60%) of the workforce is female.	The sector is difficult to organise, as there is a large majority of small companies.
HR	About two-thirds of the sector's workforce are women. Some 85% of all employees have low levels of educational attainment. Self-employment and non-standard forms of employment are not very common in the sector, but there are cases of (possibly bogus) self-employment. Due to relatively low salaries, there is a constant shortage of qualified labour.	No data.
HU	Blue-collar employees are prevalent, with not many in non-standard forms of employment, but some temporary agency workers. There are quite a few self-employed workers, and Hungarian laws allow a self-employed person (*egyéni vállalkozó*) to employ up to 30 people, usually family members. This type of employment is fairly common in this sector.	It is very difficult to organise the sector due to the prevalence of family-run businesses, which do not see the need for a trade union. The sector mainly employs women and they are generally loyal to their employers. Wages are low, and orders are inconsistent, so the need for employees is constantly fluctuating.
IE	Standard employment is prevalent, although there are also self-employment and informal/seasonal employment. Other forms of	The main barrier to organising workers is economic decline in the sector. It is difficult to pursue better terms and conditions when employment is continuously decreasing due to lack of competitiveness.

MS	Main form of employment	How difficult is it to organise workers?
	atypical employee (agency, part-time or fixed term contractor) exist but are not prevalent.	The small but resilient craft textile subsector is difficult to organise because of its informal nature, and the prevalence of self-employment and small enterprises.
IT	A significant share of workers are part-time or on temporary contracts (connected with the seasonal nature of some segments of the business, especially in clothing). Temporary agency workers represent about 15% of total employment.	In large companies, which account for 20% of the total workforce, there is a good unionisation rate, while in the rest of the sector the typically small size of companies is an obstacle to unionisation.
LT	Standard employment is prevalent. About 10% of workers are self-employed citizens.	Concentration of workers in medium and large companies should make organisation easy, but precarious employment makes it difficult.
LU	No data.	No data.
LV	Standard employment is predominant.	Small companies are prevalent, making the sector more difficult to organise.
MT	The prevalent type of employment in the sector is full-time work. One-fifth of those employed in the sector are owners/self-employed.	The majority of workers in the sector are employed in the two main companies, which makes unionisation easy. It is difficult for trade unions to represent the rest of the employees in the sector, as they are employed by microenterprises with fewer than 10 workers.
NL	Most of the workers have permanent contracts and work at the larger enterprises. There are a few on-call workers in the sector, employed to help with last-minute or large bulk assignments.	Large companies are prevalent, making the sector easier to unionise.
PL	Standard job contracts are predominant. Temporary agency work is used to some extent (over 5,500 temporary agency work contracts were concluded with people representing occupations typical of the sector (e.g. seamstress, tailor, textile machine operator) in 2017, according to the data of the Ministry of Family, Labour and Social Policy).	The prevalence of standard job contracts favours unionisation. (Data on the share of employees among employed persons confirm this.) Unionisation is hindered by relatively high employee turnover and the reluctance of young employees to join unions.
PT	Standard employment prevails. Atypical work is not a major factor in the sector.	The textile and clothing industries are traditional trade union strongholds in Portugal. The migration of factories from urban to rural areas had a negative effect on unionisation. There is a general trend

MS	Main form of employment	How difficult is it to organise workers?
		towards decreasing union influence, but the trade unions' activities have preserved a considerable membership base and trade union influence.
RO	The dominant form is standard employment, temporary agency workers and self-employment being rare. However, a characteristic of the sector is informal employment.	In small companies, union organising is impossible because of the legal provisions. Many of the employees in the sector are women, often subject to traditional values and enforced gender roles that are detrimental to union activism. The workforce is often captive: people over 50 years old who do not have many alternatives on the labour market and for whom job stability is a priority.
SE	The prevalent type of employment is fixed-term.	This is a traditional sector for the trade unions. Social dialogue is strong.
SI	Standard employment prevails.	Union membership is stronger in large companies. Small companies are more difficult to organise.
SK	Standard employment is predominant. About 20% of the workforce is self-employed.	Low wages and related turnover of employees have a negative impact on trade union membership in the sector.

Source: *Network of Eurofound Correspondents, 2020*

Table 49: Main sectoral features and impact of COVID-19

MS	Main sectoral features	Impact of COVID-19 on the sector
AT	Small, owner-managed firms predominate.	There has been a massive drop in production and sales. Short-time working schemes have been applied. Companies have become insolvent and employment has decreased.
BE	There are few large or very large companies many smaller companies. The sector has several joint committees covering their own parts of the textile and clothing sector separately for blue- and white-collar workers.	The impact on textile retail has been significant, which in turn affected the textile producers. Many textile producers are currently facing cash-flow problems, especially SMEs with smaller financial reserves. That has had a negative impact on the delivery of resources to the textile producers.

MS	Main sectoral features	Impact of COVID-19 on the sector
BG	The sector Is very important in terms of employment (one-fifth of total employment). It is export oriented and competitive due to low labour costs. Employment is on the decline. According to one trade union, the sector is characterised by low-paid labour, an ageing workforce and a high rate of undeclared work.	Orders from global brands have dropped. Part-time work has been introduced in many companies. They are at risk of insolvency and bankruptcy.
CY	There has been a significant decline in the sector in recent decades due to global competition. There has also been a reduction in social dialogue and collective bargaining representation.	Turnover has reduced due to falling demand, but with no clear effects (mostly because of the reduced size of the sector).
CZ	The positions of both subsectors within the processing industry have weakened as a consequence of strong competition from Asian countries in particular. Social dialogue in both subsectors has been in place since the late 1990s; it is stable, and relations between social partners are good.	On average the industry's sales fell by about 30%. This negatively affected employment in the sector. Companies tried to convert to face masks and other protective equipment fabrication, which allowed them to retain some of their workforces.
DE	Parts of the sector specialising in technological textiles remain competitive worldwide. In contrast, manufacturing of clothing has been affected by global competition.	Negative impacts have resulted from falling demand from the manufacturing industry (textile subsector) and the closure of retail clothing stores (clothing subsector).
DK	It is not a large industry in the country.	The industry as a whole, including fashion, wholesale and retail, has been affected by COVID-19. However, the crisis has not had a serious impact on the manufacture of textiles, mostly because of the reduced size of the industry in the country.
EE	The sector is export-oriented. The textile subsector has seen a high increase in the number of companies and a slight increase in employment; both have decreased in the clothing subsector. There has been a shift from mass production to niche products.	Employment in NACE 14 declined, but this was already a trend before the crisis. The decline was nearly non-existent in the textile subsector (NACE 13), where there were already signs of increase in the third quarter of 2020. Clothing manufacturers reoriented towards European partners for the supply of material due to China's inability to satisfy import needs.

MS	Main sectoral features	Impact of COVID-19 on the sector
		The national wage subsidy was an important support measure that helped several companies to survive the crisis.
EL	The clothing subsector (NACE 14) is larger than the textile subsector in terms of companies and employees. It has more than twice as many companies (3,953) as the textile subsector (1,531). Many companies have set up subsidiaries in neighbouring countries, such as Bulgaria, Northern Macedonia and Serbia, manufacturing all or part of the garments. It is estimated that these companies employ about 20,000 employees who are not included in the Greek industry. The last sectoral collective employment agreement was signed in 2008.	Exports in the clothing and textiles supply chain, including primary production (cotton), fell. In addition, exports of garments declined. A significant number of small and large textile companies suspended their operations.
ES	Offshoring and outsourcing threaten the industry. Many SMEs are at risk of going bankrupt. Export capacity is strong, but trade balance is in deficit.	Prolonged lockdown had a strong negative effect. Employment has declined. Some negative effects were mitigated by government measures.
FI	The size of the sector has diminished in recent years. Production volumes have decreased faster than the EU average, with companies no longer producing clothes in Finland but outsourcing to Estonia and Asia.	Approximately 70% of the companies have had to temporarily lay off employees. One-third of companies have lost more than half of their revenue. Some companies have started to produce face masks (non-standardised face masks that are not suitable for medical use) and clothing for the healthcare sector (e.g. protective coats used by medical personnel).
FR	The sector is seeing growth due to the reputation of the 'Made in France' label and a trend to relocate some production back to France	Several companies closed temporarily.
HR	With an important place in the Croatian economy due to its long-standing tradition, this sector contributes more than 8% to total national exports. The main characteristics of manufacture of textile (NACE 13) are the use of relatively advanced technology and high levels of engineering know-how, as well as opportunities for growth. Characteristics of manufacture of wearing apparel (NACE 14) are	The sector was seriously affected because companies experienced a drop in demand, as their main export markets were hit by thee poandemic. A grant per employee for a maximum of three months was offered by the government to companies affected by the crisis.

MS	Main sectoral features	Impact of COVID-19 on the sector
	labour-intensiveness, strong export orientation and openness to international cooperation. However, exports (particularly from NACE 14) are mostly based on services, with current prices low and insufficient to cover gross operating costs. Therefore, there is a need to reduce manufacturing costs, develop and create companies' own collections and promote their own brands.	Part of the sector reoriented towards producing protective three-layer cotton masks that can be used repeatedly.
HU	The majority of employers are small firms (one to four employees), but this number includes individual entrepreneurs. The bigger firms employ 200–300 people on average. There is no regulatory body. The employment of people living with a disability is common in this sector, with the largest employer specialising only in this type of employment (with state support).	Due to the hands-on nature of the sector, remote work during the COVID-19 pandemic was not possible. Some factories were able to switch to making masks and special clothing for healthcare workers, but the opportunity to make protective clothing was limited, as the authorities require suppliers to have experience in making such safety wear.
IE	A rapid decline in the 1990s and early 2000s resulted from a general loss of competitiveness, particularly with regard to labour costs. Most companies in the textile industry in Ireland are importers rather than manufacturers. The remnant of the clothing subsector seems to be primarily based on producing sportswear for the Gaelic Athletic Association, which requires that any companies applying for a licence to produce sportswear with its logo must retain production in Ireland.	The companies producing sportswear for professional Irish sports were badly hit due to the drop in sales associated with the sports calendar being abandoned. Some companies (such as Azzurri Sports) reoriented towards the production of reusable face masks.
IT	The sector is highly important to the economy. Small firms are prevalent in production, and large firms in pre- and post-production. There was restructuring after 2008.	The interruption of global supply chains negatively affected the sector. Production partially reoriented towards masks and personal protective equipment. Most of the production facilities closed. The various operators in the supply chain are unequal and their bargaining power differs. Over 86% of companies suffered a decline in turnover of more than 20% in the second quarter of 2020.

MS	Main sectoral features	Impact of COVID-19 on the sector
LT	The sector is steadily growing, provides stable employment and is export-oriented. The clothing subsector predominates.	Annual turnover fell. Companies were at risk of bankruptcy and making their workforces redundant. They reoriented towards other products (medical masks).
LU	The textile industry is small and insignificant.	Textile production activity being almost non-existent, there was no particular problem.
LV	The sector is export-oriented and important to the national economy.	The negative impact was limited to the beginning of the pandemic, as many companies retrained to manufacture medical goods
MT	The sector is very small, dominated by an export-oriented company involved in the weaving of textiles. The rest of the sector is composed of micro and small enterprises and self-employed workers.	Orders for self-employed people such as tailors dropped, since shops were closed. The negative impact on these workers was buffered by government schemes, made available for all workers in the country.
NL	NACE 13 is more developed than NACE 14. The sector is characterised by small enterprises with specialised production activities rather than large enterprises that carry out several types of textile manufacture activities.	The Dutch government has been supporting entrepreneurs, including those in the textile subsector, with emergency subsidies. The COVID-19 crisis has also increased demand for the manufacturing of protective wear (face masks and medical personal protective equipment). The crisis has also had an impact on major collective bargaining agreements. The Mode Interieur Textil Tapijt collective labour agreement, which covers most of the textile subsector, was originally expected to be renewed in March–April 2020 This procedure was postponed until June 2020.
PL	SMEs predominate, but there are some big enterprises, especially in NACE 14.13 (manufacturing of other outerwear). A significant number of the workforce are employed in NACE 13.92 (manufacturing of made-up textile articles).	There was a negative impact due to lockdown and decline in sales and orders. About 200 sewing companies under the leadership of seven large domestic producers started to produce protective clothing, especially face masks, under the patronage of the Minister for Development. By the end of June 2020, 100 million masks were planned to be sewn.
PT	The sector Is the largest in Portuguese manufacturing. SMEs are prevalent.	The standstill in consumption in most export destination countries had a strong impact. Applications for lay-offs registered by the Ministry of

MS	Main sectoral features	Impact of COVID-19 on the sector
	Large companies play a more important role in textiles, in the areas of spinning, weaving, finishing, home textiles, accessories for the automotive industry and technical textiles. There is a strong orientation towards exports.	Labour covered almost half of the workforce in Portuguese manufacturing. There was a negative impact on industrial relations, resulting in a deadlock in collective bargaining.
RO	The sector is dominated by textile assembly, which represents about 70% of activities. Most companies in the sector operate on the lohn system (outsourced manufacturing). The highest added values are in the links that are not part of the Romanian chain (raw materials, accessories, marketing/branding/wholesale/distribution) and belong to external beneficiaries. Investments in technology and the low cost of the labour force represent the main competitive advantages of the sector.	The export capacity of textile factories was affected. One of the main difficulties was ensuring supply of raw materials and accessories, because of the problems in the transport sector, but also several producers from abroad, especially Italy, suspended their activities. Orders also declined, leading to unemployment in the sector. Some factories temporarily closed down because of rising numbers of infections or because of financial difficulties.
SE	The sector has seen a major decline since the 1950s boom, with most of the production outsourced to countries where labour is cheaper. From being a sector in which most of the products were made from textile, companies now generally specialise in products made from other materials. Nappies, for instance, used to be textile and are now made from other materials. There is also an increase in demand for more bio-based and ecological products, and in some parts of the sector clothes are manufactured using bio-based materials.	The impact varied. The largest companies saw an increase in demand for some of their products. Some adapted rapidly to the crisis and began producing face masks. The smaller companies, specialising in silk scarves, for instance, have had it tougher. Demand has decreased.
SI	The industry is export-oriented and was negatively affected by the global recession.	–
SK	The sector forms a small part of the economy. All companies operating in the sector are private, and several are part of multinationals. SMEs prevail.	No significant negative impact of COVID-19 was reported on employment in the sector. Some companies producing textile products pivoted to producing products for which there was a need, such as face masks for the public.

Source: *Network of Eurofound Correspondents, 2020*

Table 50: Main features of sectoral companies and challenges for organising

MS	Type of companies	Forms of ownership	How difficult to organise?
AT	Small companies are prevalent.	The vast majority of SMEs are single-person owned companies.	Membership of the Federal Economic Chamber (WKO) is mandatory.
BE	There is a high number of SMEs. The textile sector is dominated by large companies.	The sector is characterised by a large number of small to very small companies, with a few very large companies (mainly in NACE 13). .	SMEs are more difficult to organise
BG	Tailoring companies are most often small, with 10–50 employees, followed by 50–100 employees. In the textile sector, production is organised in medium-sized to large enterprises, with over 250 employees.	Most companies are privately owned. There are also TPK (labour and production cooperatives of people with disabilities)s.	In micro and small enterprises, it is more difficult to organise. One trade union reports opposition by employers to trade union organisation, and difficulties in organising because of the lack of social dialogue and collective bargaining.
CY	Small enterprises predominate. There are few medium-sized companies and no large companies in the sector	Only private companies. Many of the small companies are single-person owned or family enterprises.	There is no employer organisation. It is very difficult to organise single- and family-owned companies.
CZ	Self-employed workers and microenterprises prevail in both subsectors. Large companies usually have foreign or mixed (both foreign and local) ownership.	Most of the companies are privately owned. There are no state-owned companies in the sector, and only 14 cooperatives in NACE 13 and 44 cooperatives in NACE 14. There are also a lot of self-employed people, especially in NACE 14.	Micro and small enterprises are more difficult to organise due to the lack of financial and personal capacities.
DE	Small companies predominate.	The sector is dominated by privately owned enterprises.	The sector is easy to organise.

MS	Type of companies	Forms of ownership	How difficult to organise?
	85% of the small firms are concentrated in manufacture of other textile (13.9) and in the clothing sector (14.1). Almost half of the large companies (over 250 employees) are concentrated in the manufacture of other textiles (13.9).		
DK	The majority of companies are small.	Private companies and family-owned companies are prevalent.	The sector is well organised.
EE	The industry has shifted from mass production to niche products, which resulted in a decrease in company size; SMEs are prevalent.	The sector is entirely privatised.	The sector is easy to organise.
EL	Small companies are prevalent.	Clothing companies make extensive use of subcontracting (often managed by immigrants, who employ other immigrants at very low wages).	The majority of the small, medium and large companies in the sector are organised in the three employer organisations, whereas the smallest companies seem to be unorganised. About 70 companies are members of more than one employer association.
ES	SMEs prevail, but the sector is dominated by four large multinationals operating in international markets.	All companies are private. Largest textile companies are generally cross-sectoral.	The heterogeneity of the sector (large cross-sectoral companies and SMEs) makes it difficult to find common ground for organising.
FI	Small companies are predominant.	Companies are mainly private.	No challenges were identified.
FR	Small companies are prevalent.	All companies are privately owned.	It is quite easy to organise, even if there are some overlaps between branches in the sector, and with branches outside the sector (e.g. clothing retail).
HR	Small businesses predominate, while some bigger firms are experiencing serious problems with market	Almost all companies in the sector are privately owned. Some are formerly	It is not a significant challenge, most likely because there is only one employer

MS	Type of companies	Forms of ownership	How difficult to organise?
	position, competitiveness and financial sustainability. To preserve jobs, companies have turned to processing operations for foreign clients, mostly from the EU. A big share of the textile industry moved to Bulgaria, Hungary, Poland, and Romania. The segment of high fashion is not at risk, but it is relatively small.	publicly owned companies that have been privatised. There is only one public firm (Orljava), which is in the process of privatisation.	association, and it can be deemed quite efficient and well organised.
HU	Self-employed people and family-owned companies are very numerous.	All companies are privately owned, with most big state-owned firms having been privatised in the 1990s. Some large firms have foreign owners. Single-person owned companies and self-employment with employees (family members) are common.	It is very difficult, as there are few large companies, and the forums for lobbying (tripartite and social dialogue bodies) are weakening.
IE	Small and medium-sized enterprises are predominant.	Companies are entirely privately owned. Craft producers do have a number of small cooperatives.	The main reason for the failure of the sector to organise appears to be the general decline in the sector.
IT	Small companies are prevalent, especially at lower levels of the production chain. Larger companies are very well-known brands, which mostly do not employ blue-collar workers directly.	Privately owned enterprises are predominant. There is a significant number of artisanal companies.	Smaller companies are particularly difficult for employer organisations to organise, even though they are often affiliated to regional, non sector-specific employer organisations – especially in the industrial districts.
LT	Small and medium-sized companies are prevalent.	Companies are mostly private.	The size of the companies makes it easy to organise the sector.
LU	No data.	No data.	There are no employer organisations or business associations in the sector.
LV	Small companies with fewer than 10 employees are prevalent.	All companies in the sector are privately owned, with a wide range of possible ownership patterns: single-person, multiple owners, with or without foreign capital.	Small companies are more difficult to organise.

MS	Type of companies	Forms of ownership	How difficult to organise?
MT	Two companies employ over half of the workforce in the sector. The rest of the sector is composed of microenterprises, generally family-owned businesses and self-employed workers.	The main two companies in the sector are privately owned foreign concerns.	Smaller companies and self-employed people can be difficult to organise, although a number of them are members f employers' organisations. s.
NL	Different parties and roles within the overall supply chain often merge and are difficult to disentangle. Roles such as producers and manufacturers of textiles and clothes, importers, wholesalers, retailers and online retailers run together, making it difficult to distinguish different types of enterprises. The vast majority of firms are single-person companies (self-employed with no staff) and natural persons (sole proprietorships, partnerships).	Ownership is mostly private.	There are no specific problems. The majority of the enterprises are members of the employer organisation due to its size and scope.
PL	Companies in the sector tend to be small. Some big companies, especially in NACE 14, combine production and/or branding with managing a chain of clothing stores.	Private entities predominate, including limited liability companies and, less frequently, joint-stock companies.	The predominance of small- and medium-sized enterprises makes organising the sector challenging.
PT	Small and medium-sized firms are prevalent, but textile companies are larger than the Portuguese average.	Private companies are predominant in the sector; special types of companies such as cooperatives are not a relevant factor. Single-person companies represent 45% of textile production and 52% of clothing manufacture.	The large number of SMEs and the existence of several major players are favourable to the organisation of companies in employer organisations.
RO	Small companies are numerous, but employ only 10% of the sectoral workforce. Almost 40% of the workforce is concentrated in the few large companies.	Private ownership is predominant in the sector. Some of the largest companies are former state factories that have been privatised.	Organising small companies is rather difficult, because of their high number, economic instability etc.

MS	Type of companies	Forms of ownership	How difficult to organise?
SE	There is one big company in the sector, employing 1,800 workers. The rest of the companies are generally small.	All ownership is private.	All companies employing more than 50 workers are organised in the sector's employer organisation.
SI	Small companies are strongly prevalent.	Ownership is mostly private.	It is difficult to organise small companies.
SK	SMEs are prevalent, particularly microenterprises.	There are only private companies. Most of them were formerly state-owned companies. Some of them are subsidiaries of multinationals.	No employer organisation operates in the sector.

Source: *Network of Eurofound Correspondents, 2020*

Table 51: Numbers and shares of companies, by NACE subcode and Member State, EU27, 2018

MS	NACE 13		NACE 13.1		NACE 13.2		NACE 13.3		NACE 13.9	
	No.	%	No.	%	No.	%	No.	%	No.	%
AT	498	39	15	1.2	30	2.4	55	4.3	398	31.3
BE	1,084	66	141	8.5	76	4.6	236	14.3	631	38.2
BG	692	14	35	0.7	26	0.5	33	0.7	598	11.8
CY	96	36	0	0.0	0	0.0	22	8.2	74	27.5
CZ	2,289	14	42	0.3	56	0.4	63	0.4	2,128	13.3
DE	4,335	59	94	1.3	222	3.0	1,592	21.8	2,426	33.3
DK	303	46	7	1.1	9	1.4	33	5.0	254	38.2
EE	294	37	10	1.2	12	1.5	20	2.5	252	31.4
EL	1,502	28	52	1.0	84	1.6	222	4.1	1,144	21.3
ES	6,435	42	382	2.5	389	2.5	845	5.5	4,819	31.2
FI	636	42	19	1.3	13	0.9	133	8.8	471	31.0
FR	5,946	33	198	1.1	307	1.7	544	3.0	4,897	27.0
HR	455	35	10	0.8	15	1.2	57	4.4	373	29.0
HU	1,288	30	32	0.8	34	0.8	110	2.6	1,112	26.1
IE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	12,615	30	1,417	3.3	1,651	3.9	1,837	4.3	7,710	18.2
LT	1,156	27	45	1.1	51	1.2	52	1.2	1,008	23.7
LU	14	54	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	14	53.8
LV	549	29	11	0.6	38	2.0	56	3.0	444	23.5
MT	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
NL	2,420	49	39	0.8	43	0.9	635	12.8	1,703	34.4
PL	6,873	32	91	0.4	164	0.8	1,250	5.9	5,368	25.3
PT	3542	29	106	0.9	239	1.9	459	3.7	2,738	22.3
RO	1529	23	59	0.9	96	1.4	160	2.4	1,214	18.2
SE	1961	51	35	0.9	73	1.9	155	4.0	1,698	43.8
SI	319	30	8	0.8	5	0.5	39	3.7	267	25.4
SK	1571	29	22	0.4	431	7.9	50	0.9	1,068	19.5
EU27	**58,402**	**32**	**2,870**	**1.6**	**4,064**	**2.2**	**8,658**	**4.7**	**42,809**	**23.4**

MS	NACE 14		NACE 14.11		NACE 14.12		NACE 14.13		NACE 14.14		NACE 14.19		NACE 14.20		NACE 14.3	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
AT	773	61	17	1.3	12	0.9	570	44.8	23	1.8	96	7.6	33	2.6	22	1.7
BE	568	34	n.d.	n.d.	23	1.4	342	20.7	n.d.	n.d.	n.d.	n.d.	15	0.9	17	1.0
BG	4,379	86	15	0.3	258	5.1	1,913	37.7	591	11.7	1,349	26.6	25	0.5	228	4.5
CY	173.0	64	3	1.1	15	5.6	129	48.0	8	3.0	8	3.0	0	0.0	10	3.7
CZ	13,684	86	166	1.0	603	3.8	9,622	60.2	298	1.9	2,125	13.3	134	0.8	736	4.6
DE	2,961	41	72	1.0	132	1.8	1,698	23.3	144	2.0	636	8.7	n.d.	n.d.	n.d.	n.d.
DK	362	54	8	1.2	7	1.1	188	28.3	21	3.2	104	15.6	20	3.0	14	2.1
EE	509	63	1	0.1	64	8.0	223	27.8	28	3.5	129	16.1	15	1.9	49	6.1
EL	3,870	72	62	1.2	172	3.2	2,212	41.2	319	5.9	284	5.3	671	12.5	150	2.8
ES	9,008	58	25	0.2	345	2.2	5,006	32.4	267	1.7	2,745	17.8	146	0.9	476	3.1
FI	884	58	40	2.6	28	1.8	339	22.3	9	0.6	390	25.7	25	1.6	53	3.5
FR	12,175	67	99	0.5	66	0.4	8,170	45.1	222	1.2	3,179	17.5	60	0.3	379	2.1
HR	832	65	21	1.6	95	7.4	478	37.1	69	5.4	87	6.8	6	0.5	76	5.9
HU	2,966	70	52	1.2	231	5.4	2,001	47.0	117	2.8	377	8.9	51	1.2	137	3.2
IE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	29,709	70	766	1.8	518	1.2	17,379	41.1	1,797	4.2	5,680	13.4	788	1.9	2,781	6.6
LT	3,096	73	33	0.8	95	2.2	2,363	55.6	60	1.4	221	5.2	44	1.0	280	6.6
LU	12	46	n.d.	n.d.	n.d.	n.d.	10	38.5	n.d.	n.d.	2	7.7	0	0.0	0	0.0
LV	1,343	71	15	0.8	79	4.2	412	21.8	109	5.8	586	31.0	11	0.6	131	6.9
MT	47	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
NL	2,535	51	47	0.9	89	1.8	1,975	39.9	44	0.9	316	6.4	4	0.1	60	1.2
PL	14,350	68	363	1.7	956	4.5	9,361	44.1	643	3.0	1,840	8.7	263	1.2	924	4.4
PT	8,754	71	40	0.3	232	1.9	6,818	55.4	322	2.6	845	6.9	19	0.2	478	3.9
RO	5,137	77	107	1.6	332	5.0	3,535	53.0	251	3.8	556	8.3	41	0.6	315	4.7
SE	1,915	49	73	1.9	42	1.1	1,014	26.2	66	1.7	609	15.7	42	1.1	69	1.8
SI	734	70	13	1.2	34	3.2	481	45.7	14	1.3	113	10.7	3	0.3	76	7.2
SK	3,894	71	39	0.7	137	2.5	2,330	42.6	28	0.5	1,171	21.4	68	1.2	121	2.2

MS	NACE 14		NACE 14.11		NACE 14.12		NACE 14.13		NACE 14.14		NACE 14.19		NACE 14.20		NACE 14.3	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
EU27	**124,670**	**68**	**2,077**	**1.1**	**4,565**	**2.5**	**78,569**	**42.9**	**5,450**	**3.0**	**23,448**	**12.8**	**2,484**	**1.4**	**7,582**	**4.1**

Note: *n.d., no data.*

Source: *Eurostat, Structural Business Statistics, 2018*

Table 52: Member States grouped by proportion of national sectoral companies

Proportion of national sectoral companies	NACE 13	NACE 13.9	NACE 14	NACE 14.13
Above EU27 average	AT, BE, CY, DE, DK, EE, ES, FI, FR, HR, LU, NL, PL, SE (14 MS)	AT, BE, CY, DE, DK, EE, ES, FI, FR, HR, HU, LU, NL, PL, SE, SI (16 MS)	BG, CZ, ES, HU, IT, LT, LV, PL, PT, RO, SI, SK (12 MS)	AT, CY, CZ, FR, HU, LT, PL, PT, RO, SI (10 MS)
Below EU27 average	BG, CZ, EL, HU, IE, IT, LT, LV, PT, RO, SI, SK (12 MS)	BG, CZ, EL, IE, IT, LT, LV, PT, RO, SK (10 MS)	AT, BE, CY, DE, DK, EE, IE, ES, FI, FR, HR, LU, NL, SE (14 MS)	BE, BG, DE, DK, EE, EL, ES, FI, HR,IE, IT, LU, LV, NL, SE, SK (16 MS)

Source: *Eurostat Business Statistics, 2017. Note: Data for MT are missing*

Table 53: People employed per enterprise by NACE subcode

MS	NACE 13	NACE 13.1	NACE 13.2	NACE 13.3	NACE 13.9	NACE 14	NACE 14.11	NACE 14.12	NACE 14.13	NACE 14.14	NACE 14.19	NACE 14.20	NACE 14.3
AT	16.6	36.7	66.3	9.1	13.1	6.5	2.4	45.1	4.5	25.6	4.4	2.4	36.9
BE	13.6	3.9	32.8	4.1	17.1	5.5	n.d.	19.9	4.3	n.d.	n.d.	2.2	5.2
BG	18.4	117.7	25.1	10.9	12.7	19.8	8.2	19.1	24.7	27.6	7.9	2	32.9
CY	5.6	n.d.	n.d.	2.4	6.6	2.1	1	3.6	1.9	3.5	2.3	n.d.	1.8
CZ	11	47.4	96.7	9.3	8.1	1.9	1.3	5.7	1.3	10.4	2	1.3	2.7
DE	18.8	35.1	44.4	8.3	22.8	14.5	7.9	21.2	12.3	39.6	9.5	n.d.	n.d.
DK	11.7	n.d.	n.d.	4.6	12.8	5	1.6	n.d.	3.1	n.d.	3.6	5	7.4
EE	14.5	n.d.	n.d.	7.4	15.2	10.8	n.d.	21.9	10	n.d.	5	1.6	6.9
EL	6.4	28.5	4.7	5.9	5.6	4.7	2.2	3	5.2	6.4	3.9	3.7	3.9
ES	7.2	12.4	14.4	10	5.7	4.9	4.7	5.8	4.9	6.3	3.8	2.3	9.2
FI	4.1	n.d.	n.d.	1.9	4.7	n.d.	1.5	13.3	5.5	9.4	1.6	n.d.	5.9
FR	6.3	14.5	20	3.4	5.5	3.9	4.5	39	2.8	52.2	1.6	4.2	13.7
HR	8.1	52.7	24.3	7.4	6.3	17.2	4.6	15.8	9.5	39.4	20.2	2.2	47.9

HU	10.5	34.6	22.5	4.2	10.1	7.2	3	10.5	5.6	31.6	4.8	2.3	14.9
IE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IT	9.1	11.3	17.3	10.4	6.7	7	5.4	5.5	7.3	7.4	5.8	2.7	9.1
LT	8.6	32.3	25.8	5.9	6.8	5.8	1	17.6	4.4	52.1	4.9	2.6	5.9
LU	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
LV	5.6	4	4.7	2.9	6.1	6.8	1.9	23.8	6.8	21.5	1.6	1.8	8.5
MT	n.d.	n.d.	n.d.	n.d.	n.d.	4.5	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
NL	5.2	3.4	17.5	2.1	6.1	1.4	1.8	5	1.2	1.4	1.4	1	2
PL	9.2	31.4	22.9	5.6	9.3	6.7	4.5	12.9	5.9	12.8	4.3	2.7	10.7
PT	13.5	25.1	34.6	21.1	9.9	10.4	2.5	6.3	10.3	26	3.9	3.1	15.9
RO	21.5	78	31.6	19	18.3	25	8	17.1	25.2	63.1	13.4	3.3	29.5
SE	2.6	1.3	3.4	1.7	2.7	0.7	0.4	1.1	0.4	8.6	0.4	0.6	1.2
SI	10.5	82.3	n.d.	n.d.	9.4	4.3	2.6	7.3	3.3	28.2	2.2	n.d.	n.d.
SK	4.7	17.9	2.5	2.8	5.4	4.3	2.1	13.1	3.3	85.2	2.2	1.8	18.4
EU27	**9.0**	**24.8**	**18.9**	**5.9**	**8.4**	**6.7**	**2.7**	**12.4**	**6.1**	**20.7**	**4.1**	**1.8**	**10.8**

Note: *n.d., no data.*

Source: *Eurostat, Structural Business Statistics, 2018*

Table 54: National trade unions in the textile and clothing sector

MS	Short name	English name	National-language name
AT	PRO-GE	Manufacturing Union	Produktionsgewerkschaft
	GPA	Union of Private Sector Employees, Printing, Journalism and Paper	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier
BE	ACV-CSC Metea	Confederation of Christian Trade Unions Metea	Algemeen Christelijk Vakverbond/ Confédération des syndicats chrétiens Metea
	ACLVB-CGSLB	General Federation of Liberal Trade Unions of Belgium	Algemene Centrale der Liberale Vakverbonden van België/Centrale générale des syndicats libéraux de Belgique
	ABVV-FGTB ACCG	ABVV-FGTB General Federation	ABVV-FGTB Algemene Centrale/Centrale générale
	ACV-CSC CNE	Confederation of Christian Trade Unions General National Federation of White-collar Workers	Algemeen Christelijk Vakverbond/ Confédération des syndicats chrétiens Centrale Nationale des Employés/Groupement national des cadres
BG	FNSOLP	Federation of Light Industry Trade Union Organisations	Федерация на независимите синдикални организации от леката промишленост
	Podkrepa	Federation of Light Industry Podkrepa	Федерация „Лека промишленост“ Подкрепа

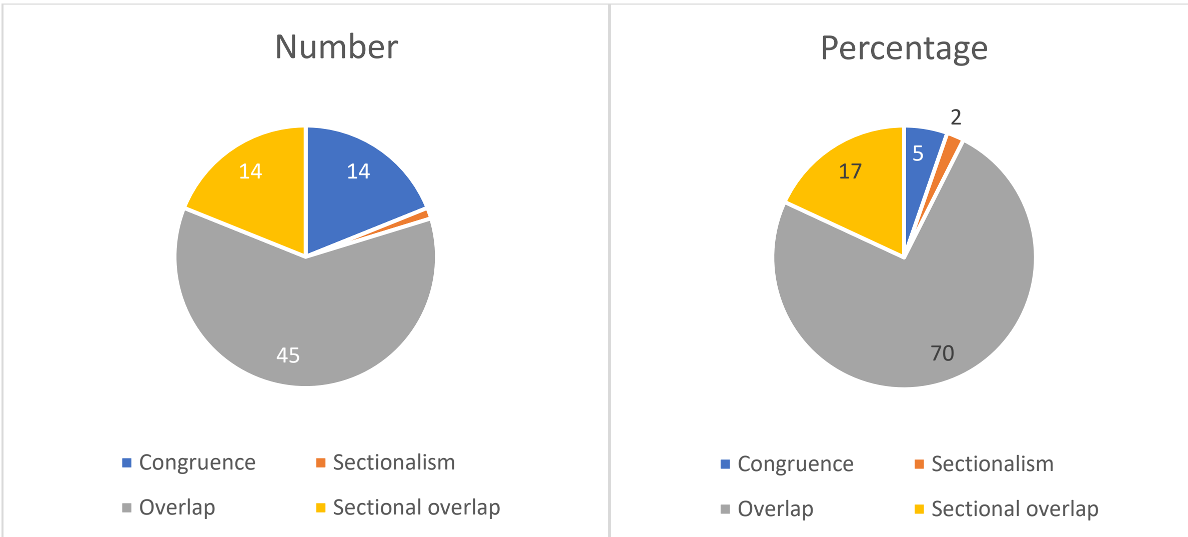
CY	SEVETTYK-PEO/ ΣΕΒΕΤΤΥΚ-ΠΕΟ	Cyprus Union of Workers in Industry, Commerce and Press and Printing and General Services	Συντεχνία Εργατοϋπαλλήλων Βιομηχανίας, Εμπορίου, Τύπου-Τυπογραφείων και Γενικών Υπηρεσιών Κύπρου
	OBIEK-SEK/OBIEK-ΣΕΚ	Federation of Industrial Workers of Cyprus	Ομοσπονδία Βιομηχανικών Εργατοϋπαλλήλων Κύπρου
CZ	OS TOK	Trade Union of Workers in the Textile, Clothing and Leather Industry of Bohemia and Moravia	Odborový svaz pracovníků textilního, oděvního a kožedělného průmyslu Čech a Moravy
DE	IG Metall	Industrial Union of Metalworkers	Industriegewerkschaft Metall
DK	3F	United Federation of Danish Workers	Fagligt Fælles Forbund
	HK	HK Private	HK Privat
	TL	Danish Union of Professional Technicians	Teknisk Landsforbund
EE	ETTAF	Estonian Industry Workers' Trade Union	Eesti Tööstustöötajate Ametiühingute Föderatsioon
EL	ΟΕΚΙΔΕ	Greek Textile, Clothing and Leather Workers' Federation	Ομοσπονδία Εργατοϋπαλλήλων Κλωστοϋφαντουργίας-Ιματισμού-Δέρματος Ελλάδας
	PSPKM	Hellenic Textile Engineers' Association	Panellinios Syllogos Ptihiouhon Mixanikon Klostoyfantourgon
ES	CCOO de Industria	Trade Union Federation of Workers' Commissions – Industry Federation	Comisiones Obreras de Industria
	UGT FICA	Federation of Industry, Construction and Farming of the General Workers' Unions	Federación de Industria, Construcción y Agro de la Unión General de Trabajadores
	ELA	Basque Workers' Solidarity – Industry and Construction	Eusko Langileen Alkartasuna – Industria eta Eraikuntza
	FI-USO	Federation of Industry of the Workers' Trade Unionist Confederation	Federación de Industria de Unión Sindical Obrera
	CIG Industria	Galician Industrial Confederation	Confederation Industrial Galega
FI	Pro	Trade Union Pro	Ammattiliitto Pro ry
	Finnish Industrial Union	Finnish Industrial Union	Teollisuusliitto
FR	CMTE-CFTC	Chemicals, Mining, Textiles and Energy Federation – French Confederation of Christian Workers	Fédération chimie, mines, textile, énergie – Confédération française des travailleurs chrétiens
	CFE-CGC Chimie	Chemical Federation, French Confederation of Management – General Confederation of Executives	Fédératon de la chimie, Confédération française de l'encadrement – Confédération générale des cadres
	FO Fédéchimie	Chemical Federation – Workers' Force	Force Ouvrière Fédéchimie
	FO Pharmacie	Federation of the Pharmaceutical, Medical Analysis and Biology, Leather and Clothing Industries – Workers' Force	Fédération Force Ouvrière Pharmacie, LBM, Cuir et Habillement

	FS-CFDT	Services Federation – French Democratic Confederation of Labour	Fédération des services – Confédération française démocratique du travail
	CGT-THCB	Textile, Clothing, Leather and Laundry Federation – General Confederation of Labour	Fédération textile habillement cuir blanchisserie – Confédération générale du travail
	UNSA Textile	National Union of Autonomous Trade Unions – Textile and Related Industries	Union nationale des syndicats autonomes – Industries textiles et activités connexes nationales
HR	Sindtokg	Trade Union in Textile, Garments, Leather and Rubber of Croatia	Sindikat tekstila, obuće, kože, gume Hrvatske
HU	BDSZ	Trade Union of Mine, Energy and Industry Workers	Bánya-, Energia- és Ipari Dolgozók Szakszervezete
	HVDSZ 2000	Trade Union of Workers in Local Industry and City Services	Helyiipari és Városgazdasági Dolgozók Szakszervezete 2000
	MTSZSZ	Free Trade Union of Engineers and Technicians	Mérnökök és Technikusok Szabad Szakszervezete
	VSZSZ – Propex MSZ	Vasas Trade Union Confederation – Propex company chapter	Vasas Szakszervezeti Szövetség – Propex Munkahelyi Szervezete
IE	SIPTU	Services Industrial Professional Trade Union	Services Industrial Professional Trade Union
IT	FILCTEM	Italian Federation of Chemical, Textiles, Energy and Manufacturing Workers	Federazione italiana lavoratori chimica, tessile, energia, manifatture
	FEMCA-CISL	Federation of Energy, Fashion, Chemistry and Related Industries	Federazione Energia, Moda, Chimica e Affini
	UILTEC-UIL	Italian Union of Textile, Energy and Chemical Workers	Unione Italiana Lavoratori Tessile, Energia e Chimica
	UGL Chimici	General Labour Union Chemical Workers	Unione Generale del Lavoro Chimici
LT	LLPPS	Lithuanian Trade Union Confederation – Light Industry	Lietuvos lengvosios pramonės profesinė sąjunga
	LPĮPS Solidarumas	Lithuanian Trade Union Solidarumas – Industrial Workers in Textile, Clothing and Leather	Lietuvos pramonės įmonių profesinė sąjunga 'Solidarumas'
LU	LCGB	Luxembourg Federation of Christian Trade Unions	Lëtzebuerger Chrëschtleche Gewerkschaftsbond/Confédération luxembourgeoise des syndicats chrétiens
	OGB-L	Luxembourg Confederation of Independent Trade Unions	Onofhängege Gewerkschafts-Bond Lëtzebuerg/Syndicat commerce de la Confédération syndicale indépendante Luxembourg
LV	LIA	Latvian Industrial Workers' Trade Union	Latvijas Industriālo nozaru arodbiedrība
MT	GWU	General Workers' Union	General Workers' Union

NL	FNV Procesindustrie	Federation of Dutch Trade Unions – Process Industry	Federatie Nederlandse Vakbeweging – Procesindustrie
	CNV Vakmensen	National Christian Union – Professionals	Christelijk Nationaal Vakverbond Vakmensen
	De Unie	Trade Union The Union	Vakbond de Unie
PL	FNSZZPL	Federation of Independent Self-governing Trade Unions of Light Industry	Federacja Niezależnych Samorządnych Związków Zawodowych Przemysłu Lekkiego
	NSZZ Solidarność	Independent Self-governing Trade Union Solidarność	Niezależny Samorządny Związek Zawodowy 'Solidarność'
PT	Fesete	Federation of Textile, Wool, Clothing, Footwear and Leather Workers' Unions of Portugal	Federação dos Sindicatos dos Trabalhadores Têxteis, Lanifícios, Vestuário, Calçado e Peles de Portugal
	SIMA	Union of Metal Manufacturing and Related Areas	Sindicato das Indústrias Metalúrgicas e Afins
	Sindeq	Union of Industries and Related Activities	Sindicato das Indústrias e Afins
RO	FNSIU Uniconf	National Federation of Light Industry Uniconf	Federatia Nationala a Sindicatelor din Industria Usoara Uniconf
	FNS Solidaritatea Metal	National Trade Union Federation Solidaritatea Metal	Federatia Nationala Sindicala Solidaritatea Metal
	FSLR	Federation of Free Trade Unions in Romania	Federatia Sindicatelor Libere din Romania
	Confpeltex	Confpeltex Federation	Federatia Confpeltex
SE	IF Metall	Metal Workers' Union	Industrifacket Metall
	Unionen	Unionen	Unionen
	Sveriges Ingenjörer	Swedish Association of Graduate Engineers	Sveriges Ingenjörer
	Ledarna	Ledarna	Ledarna
SI	STUPIS	Trade Union of the Slovenian Textile and Leather-processing Industry	Sindikat tekstilne in usnjarsko predelovalne industrije Slovenije
SK	IOZ	Integrated Trade Union Association	Integrovaný odborový zväz

Source: *Network of Eurofound Correspondents, 2020*

Figure 17: Trade union membership domains



Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 55: Trade union membership by NACE subcode

MS	Trade union	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	Total NACE 13 subcodes covered	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	Total NACE 14 subcodes covered
AT	PRO-GE	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	GPA	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
BE	ACV-CSC Metea	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	ACLVB-CGSLB	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	ABVV-FGTB ACCG	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	ACV-CSC CNE	Yes	Yes	Yes	Yes	4	No	No	No	No	No	No	No	0
BG	FNSOLP	Yes	Yes	No	Yes	4	No	Yes	Yes	Yes	No	No	Yes	6
	Podkrepa					n.d.								n.d.
CY	SEBETTYK-PEO	No	No	No	No	0	Yes	No	Yes	No	No	No	Yes	3
	OBIEK – SEK	No	No	No	No	0	Yes	No	No	No	No	No	No	1
CZ	OS TOK	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
DE	IG Metall	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
DK	3F	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	No	Yes	Yes	Yes	6
	HK	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7

MS	Trade union	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	Total NACE 13 subcodes covered	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	Total NACE 14 subcodes covered
	TL	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
EE	ETTAF	No	No	No	Yes	1	No	No	Yes	Yes	No	No	No	2
EL	OEKIDE	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	PSPKM	No	No	No	Yes	1	No	No	No	No	No	No	No	0
ES	CCOO de Industria	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	UGT FICA	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	ELA	No	Yes	Yes	No	2	No	No	No	No	No	No	No	0
	FI-USO	No	No	No	No	0	Yes	Yes	Yes	Yes	Yes	Yes	No	7
	CIG Industria					n.d.								n.d.
FI	Pro	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Finnish Industrial Union	No	No	Yes	Yes	2	No	Yes	Yes	Yes	No	Yes	Yes	5
FR	CMTE-CFTC	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	CFE-CGC Chimie	Yes	Yes	Yes	Yes	4	No	Yes	Yes	Yes	Yes	No	Yes	5
	FO Fédéchimie	Yes	Yes	No	Yes	3	No	Yes	Yes	Yes	Yes	No	Yes	5
	FO Pharmacie	No	No	No	No	0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	FS-CFDT	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	CGT-THCB	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	UNSA Textile	Yes	Yes	Yes	Yes	4	No	No	Yes	Yes	Yes	No	No	3
HR	Sindtokg	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	No	Yes	7
HU	BDSZ	Yes	Yes	Yes	Yes	4	No	Yes	Yes	Yes	Yes	No	Yes	1
	HVDSZ 2000	No	No	No	No	0	Yes	Yes	Yes	No	Yes	No	Yes	1
	MTSZSZ	No	No	No	No	0	Yes	No	No	No	No	No	No	1
	VSZSZ – Propex MSZ	Yes	Yes	No	No	2	No	No	No	No	No	No	No	0
IE	SIPTU	No	No	Yes	Yes	2	No	No	No	No	No	No	Yes	1
IT	FILCTEM	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	FEMCA-CISL	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	UILTEC-UIL	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	UGL Chimici	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
LT	LLPPS	Yes	Yes	Yes	Yes	4	No	No	Yes	Yes	No	No	Yes	2
	LPĮPS Solidarumas	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1

MS	Trade union	Members in 13.1	Members in 13.2	Members in 13.3	Members in 13.9	Total NACE 13 subcodes covered	Members in 14.11	Members in 14.12	Members in 14.13	Members in 14.14	Members in 14.19	Members in 14.20	Members in 14.3	Total NACE 14 subcodes covered
LU	LCGB					n.d.								n.d.
	OGB-L					n.d.								n.d.
LV	LIA	n.d.	n.d.	n.d.	Yes	1	Yes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	1
MT	GWU	No	Yes	No	No	1	No	No	Yes	No	No	No	No	1
NL	FNV Procesindustrie	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	CNV Vakmensen	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	De Unie					n.d.								n.d.
PL	FNSZZPL	Yes	Yes	Yes	Yes	4	Yes	No	Yes	Yes	Yes	Yes	Yes	6
	NSZZ Solidarność	n.a.	n.a.	n.a.	Yes	1								n.d.
PT	Fesete	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	SIMA	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Sindeq	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
RO	FNSIU Uniconf	No	No	Yes	Yes	2	Yes	No	No	No	No	No	No	1
	FNS Solidaritatea Metal	No	No	No	Yes	1	No	No	No	No	No	No	No	0
	FSLR	No	No	No	No	0	No	No	Yes	Yes	No	No	No	2
	Confpeltex	No	No	No	No	0	Yes	No	No	No	No	No	No	1
SE	IF Metall	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Unionen	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Sveriges Ingenjörer	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Ledarna	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
SI	STUPIS	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
SK	IOZ	Yes	Yes	No	No	2	Yes	No	Yes	Yes	No	No	No	3

Note: *n.a., not applicable; n.d., no data.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 56: National employer organisations in the textile and clothing sector

MS	Short name	English name	National-language name
AT	BIMBT	Federal Association of Fashion and Clothing Engineering	Bundesinnung Mode- und Bekleidungstechnik

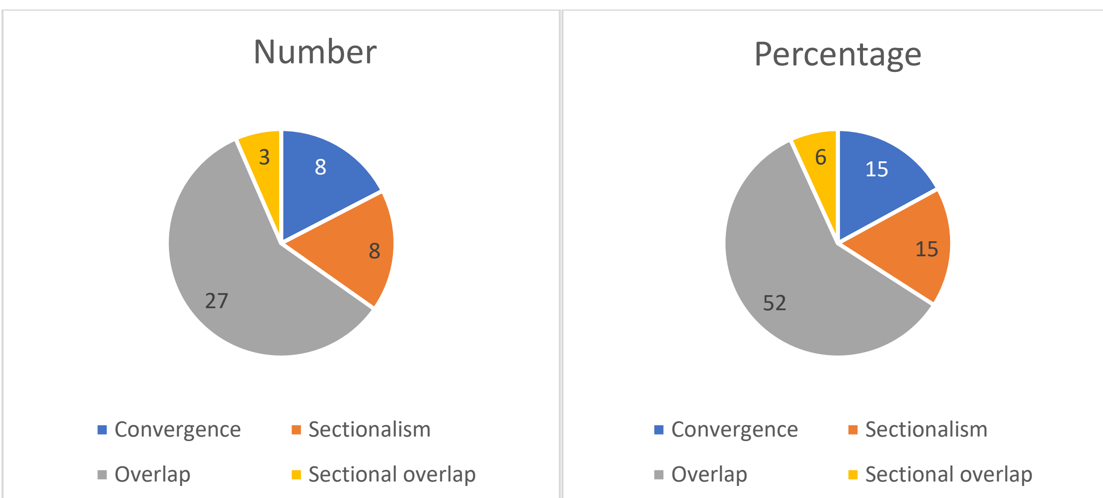
MS	Short name	English name	National-language name
	FVTBSL	Federal Association of the Textile, Clothing, Shoe and Leather Industry	Fachverband der Textil-, Bekleidungs-, Schuh- und Lederindustrie
BE	Creamoda	Creamoda	Creamoda
	Fedustria	Fedustria	Fedustria
BG	BAATPE/БАПИОТ	Bulgarian Association of Apparel and Textile Producers and Exporters	Българска Асоциация на Производителите и Износителите на Облекло и Текстил
	BATOK	Българската асоциация за текстил, облекло и кожи	Bulgarian Association for Textile, Apparel and Leather
	BOTO	Браншова организация за текстил и облекло	Textile and Clothes Branch Organization
CY	None	None	None
CZ	ATOK	Association of the Textile, Clothing and Leather Industry	Asociace textilního-oděvního-kožedělného průmyslu
DE	textil+mode	Confederation of the German Textile and Fashion Industry	Gesamtverband der deutschen Textil- und Modeindustrie
DK	DM&T	Danish Fashion and Textile	Dansk Mode og Textil
	Tailors’ Guild	Tailors’ Guild	Skrædderlauget
EE	ERTL	Estonian Clothing and Textile Association	Eesti Rõiva- ja Tekstiililiit
	EKL	Estonian Fur Association	Eesti Karusnahaliit
EL	SEPEE	Hellenic Fashion Industry Association	Sindesmos Epihiriseon Plektikis kai Etimou Endimatos Ellados
	SEVK	Federation of Greek Textile Industrialists	Syndesmos Ellinon Viomihanon Klostoyfantourgon
	SKEE	Hellenic Clothing Industry Association	Syndesmos Kataskevaston Etimon Endymaton
ES	CIE	Spanish Intertextile Council	Consejo Intertextil Español
	Fedecon	Spanish Federation of Garment-making Companies	Federación Española de Empresarios de la Confección
	AEGP	Spanish Knitwear Group	Agrupación Española del Género de Punto
FI	Suomen Tekstiili & Muoti	Finnish Textile & Fashion	Suomen Tekstiili ja Muoti ry
FR	UIT	Union of Textile Industries	Union des industries textiles
	UFIMH	French Union of Clothing Industries	Union française des industries de l’habillement
	FHCM	Federation of Haute Couture and Fashion	Fédération de la haute couture et de la mode
	UNACAC	National Union of Sewing Crafts and Related Activities	Union nationale artisanale de la couture et des activités connexes
HR	HUP UTKI	Croatian Employers Association – Textile and Leather Industry Association	Hrvatska Udruga poslodavaca, Udruga tekstilne i kožne industrije

MS	Short name	English name	National-language name
	HGK UTOI	Croatian Chamber of Economy – Industry and Technology Department, Association of the Textile and Apparel Industry	Hrvatska gospodarska komora – Udruženja tekstilne can odjevne industrije
HU	MKSZ	Association of Hungarian Light Industry	Magyar Könnyűipari Szövetség
IE	IBEC	Irish Business Employers Confederation	Irish Business Employers Confederation
IT	SMI	Sistema Moda Italy	Sistema Moda Italia
	Confartigianato Moda	National Federation of Artisans in the Fashion Sector	Confartigianato Moda
	CNA Federmoda	National Confederation of Craft Sector and Small and Medium-sized Enterprises Federmoda	Confederazione Nazionale dell'Artigianato e della Piccola e Media impresa Federmoda
	Casartigiani	Autonomous Confederation of Artisan Unions	Confederazione Autonoma Sindacati Artigiani
	CLAAI	Confederation of Free Italian Artisan Associations	Confederazione delle Libere Associazioni Artigiane Italiane
	Uniontessile Confapi	National Union of Small and Medium-sized Enterprises in the Textile and Clothing Industry	Unione Nazionale Piccola e Media Industria Tessile Abbigliamento
LT	LATIA	Lithuanian Apparel and Textile Industry Association	Lietuvos aprangos ir tekstilės įmonių asociacija
LU	None	None	None
LV	VRUA	Association of the Textile and Clothing Industry	Vieglās rūpniecības uzņēmumu asociācija
MT	MEA	Malta Employers' Association	Malta Employers' Association
NL	Modint	Business Organisation for Fashion, Interior Design, Carpets and Textiles	Ondernemersorganisatie voor Mode, Interieur, Tapijt en Textiel
PL	PIOT	Federation of Apparel and Textile Industry Employers	Związek Pracodawców Przemysłu Odzieżowego i Tekstylnego
	PPL	Light Industry Employers	Pracodawcy Przemysłu Lekkiego
	ZPPT	Association of Textile Industry Employers	Związek Pracodawców Przemysłu Tekstylnego
	ZPPPT	Association of Polish Textile Industry Employers	Związek Polskich Pracodawców Przemysłu Tekstylnego
PT	ANIVEC/APIV	National Association of the Clothing, Apparel and Fashion Industries	Associação Nacional das Indústrias de Vestuário, Confecção e Moda
	ATP	Textile and Clothing Association of Portugal	Associação Têxtil e Vestuário de Portugal
	ANIL	Portuguese Wool Textile Association	Associação Nacional dos Industriais de Lanifícios e Outra

MS	Short name	English name	National-language name
	Anit-Lar	National Association of Home Textile Industries	Associação Nacional das Indústrias de Têxteis-Lar
	AICR	Association of the Rope and Net Industries	Associação dos Industriais de Cordoaria e Redes
RO	ANITR	National Association of the Textile Industry of Romania	Asociația Națională a Industriei Textile din România
	AstricoNE	Astrico North-East Association	Asociația Astrico Nord-Est
	Fepaius	Employers' Federation for Textile, Garments and Leather	Federația Patronala a Textilelor, Confectiilor și Pielariei
SE	TEKO	Swedish Textile and Clothing Industries Association	Sveriges Textil- och Modeföretag
SI	ZDS	Association of Employers of Slovenia	Združenje delodajalcev Slovenije
	ZTOUPI	Textile, Clothing and Leather Processing Association of the Chamber of Commerce and Industry of Slovenia	Združenje za tekstilno, oblačilno in usnjarsko predelovalno industrijo
SK	None	None	None

Source: *Network of Eurofound Correspondents, 2020*

Figure 18: Employer organisation membership domains



Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 57: Employer organisation membership by NACE subcode

MS	Employer organisation	13.1	13.2	13.3	13.9	Total NACE 13 subcodes covered	14.11	14.12	14.13	14.14	14.19	14.20	14.3	Total NACE 14 subcodes covered
AT	BIMBT	Yes	Yes	Yes	No	3	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	FVTBSL	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
BE	Creamoda	Yes	Yes	Yes	Yes	4	No	No	No	No	No	No	No	0
	Fedustria	No	No	No	No	0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
BG	BAATPE	Yes	Yes	No	Yes	3	No	Yes	Yes	Yes	No	No	Yes	4
	BATOK	Yes	Yes	No	Yes	3	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	BOTO					n.d.								n.d.
CY	None					n.a.								n.a.
CZ	ATOK	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
DE	textil+mode	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
DK	DM&T	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Tailors' Guild	No	No	No	No	0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
EE	ERTL	Yes	Yes	No	Yes	3	Yes	Yes	Yes	Yes	Yes	No	Yes	6
	EKL	No	No	No	No	0	No	No	No	No	Yes	Yes	No	2
EL	SEPEE	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	SEVK	Yes	Yes	Yes	Yes	4	No	No	No	No	No	No	Yes	1
	SKEE	No	No	No	No	0	Yes	Yes	Yes	Yes	Yes	Yes	No	6
ES	CIE	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Fedecon	No	No	No	Yes	1	Yes	Yes	Yes	Yes	Yes	No	Yes	6
	AEGP	Yes	Yes	Yes	Yes	4	No	No	No	No	No	No	No	0
FI	Suomen Tekstiili & Muoti	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7

MS	Employer organisation	13.1	13.2	13.3	13.9	Total NACE 13 subcodes covered	14.11	14.12	14.13	14.14	14.19	14.20	14.3	Total NACE 14 subcodes covered
FR	UIT	Yes	Yes	Yes	Yes	4	No	No	Yes	Yes	Yes	No	No	3
	UFIMH	No	No	No	No	0	No	No	Yes	Yes	Yes	Yes	No	4
	FHCM	No	No	No	No	0	No	No	Yes	Yes	Yes	Yes	Yes	5
	UNACAC	No	No	No	No	0	Yes	No	Yes	Yes	Yes	No	Yes	5
HR	HUP UTKI	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	No	No	Yes	5
	HGK UTOI	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	No	Yes	6
HU	MKSZ	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
IE	IBEC	No	No	Yes	No	1	No	Yes	Yes	No	No	No	No	2
IT	SMI	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Confartigianato Moda	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	CNA Federmoda	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Casartigiani	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	CLAAI	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	Uniontessile Confapi	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
LT	LATIA	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
LU	none					n.a.								n.a.
LV	VRUA	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
MT	MEA	No	Yes	No	Yes	2	No	No	Yes	No	Yes	No	No	2
NL	Modint	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
PL	PIOT	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	PPL					n.d.								n.d.
	ZPPT					n.d.								n.d.

MS	Employer organisation	13.1	13.2	13.3	13.9	Total NACE 13 subcodes covered	14.11	14.12	14.13	14.14	14.19	14.20	14.3	Total NACE 14 subcodes covered
	ZPPPT					n.d.								n.d.
PT	ANIVEC/APIV	No	No	No	No	0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	ATP	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	ANIL	Yes	Yes	Yes	Yes	4	No	No	No	No	No	No	No	0
	Anit-Lar	Yes	Yes	Yes	Yes	4	No	No	No	No	No	No	No	0
	AICR					n.d.								0
RO	ANITR					n.d.								0
	AstricoNE		No	No	Yes	2	No	No	Yes	Yes			Yes	3
	Fepaius	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
SE	TEKO	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
SI	ZDS	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	7
	ZTOUPI	Yes	Yes	Yes	Yes	4	no	Yes	Yes	Yes	Yes	No	No	4
SK	None					n.a.								n.a.

Note: *n.a., not applicable; n.d., no data.*

Source: *Authors' calculations based on information from the Network of Eurofound Correspondents, 2020*

Table 58: Collective bargaining and social dialogue involvement of trade unions not affiliated to IndustriAll Europe

MS	Trade union	CB level*	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	No. of NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	No.r of NACE 14 subcodes covered	Involved in bipartite or tripartite SD	Consulted by the government
BE	ACV-CSC CNE	B					4										
CY	SEVETTYK-PEO	C					0								2		
EL	OEKIDE	No CB					0								0		
	PSPKM	No CB					0								0		
ES	CIG Industria	No CB					0								0	n.d.	n.d.
FR	FO Pharmacie	B					0								7		
	UNSA Textile	C					4								4		
HU	HVDSZ 2000	C					0								3		
	MTSZSZ	C					0								1		
	VSZSZ – Propex MSZ	C					2								0		
IT	UGL Chimici	S					4								7		n.d.
LU	LCGB	No CB					0								0		
	OGB-L	C					1								0		
NL	De Unie	B					4								7		
PL	Fesete	C					1								0		
RO	Confpeltex	C					0								2		
SI	STUPIS	S					4								7		

MS	Trade union	CB level*	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	No. of NACE 13 subcodes covered	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CB NACE 14.3	No.r of NACE 14 subcodes covered	Involved in bipartite or tripartite SD	Consulted by the government
EU 27	17	13	6	6	5	7		7	5	8	6	5	4	5		5	5

Note: ** CB, collective bargaining; n.d., no data; SD, social dialogue. * sector level (S), company level (C) or both (B)*

Source: *Network of Eurofound Correspondents, 2020*

59: Collective bargaining and social dialogue involvement of employer organisations not affiliated to Euratex

MS	EO	CB level	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	Total NACE 13 subcodes	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CBNACE 14.3	Total NACE 14 subcodes covered	Involved in bipartite or tripartite SD	Consulted by the government
AT	BIMBT	S					3								7		
BG	BATOK	S					0								0		
	BOTO	No CB					0								0	n.d.	n.d.
CZ	ATOK	S					4								7		
DK	DM&T	S					4								7		
	Tailors' Guild	S					0								7		
EE	ERTL	No CB					0								0		
	EKL	No CB					0								0		
EL	SEVK	No CB					0								0		
ES	Fedecon	S					4								7		
	AEGP	S					4								7		
FR	FHCM	S					0								6		
	UNACAC	S					0								4		
HR	HUP UTKI	No CB					0								0		

MS	EO	CB level	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	Total NACE 13 subcodes	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CBNACE 14.3	Total NACE 14 subcodes covered	Involved in bipartite or tripartite SD	Consulted by the government
IE	IBEC	No CB *					0								0		
IT	Confarti-gianato Moda	S**					4								7		
	CNA Feder-moda	Both					4								7		
	Casarti-giani	S**					4								7		
	CLAAI	S**					4								7		
	Union-tessile Confapi	S**					4								7		
LV	VRUA	No CB*					0								0		
MT	MEA	No CB *					0								0		
NL	Modint	S					4								7		
	PPL	No					0								0	n.a.	n.d.
	ZPPT	No					0								0	n.a.	n.d.

MS	EO	CB level	CB NACE 13.1	CB NACE 13.2	CB NACE 13.3	CB NACE 13.9	Total NACE 13 subcodes	CB NACE 14.11	CB NACE 14.12	CB NACE 14.13	CB NACE 14.14	CB NACE 14.19	CB NACE 14.20	CBNACE 14.3	Total NACE 14 subcodes covered	Involved in bipartite or tripartite SD	Consulted by the government
	ZPPPT	No CB					0								0	n.a.	n.d.
PT	ANIVEC/ APIV	S					4								7		
	Anit-Lar	S					4								0	n.d.	n.d.
	AICR	S	n.d.	n.d.	n.d.	n.d.	0	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	0	n.d.	n.d.
RO	ANITR	No CB					0								0	n.d.	n.d.
	Fepaius	No CB					0								0		
SE	TEKO	S					4								7		
SI	ZDS	S					4								7		
	ZTOUPI	S					4								7		
EU27	**34**	**22**	**16**	**16**	**16**	**15**		**17**	**16**	**18**	**18**	**18**	**17**	**18**		**19**	**20**

Note: ** Provides assistance to its members that are involved in company-level bargaining. ** There are no data for Italy regarding involvement in company-level collective bargaining, but it has been assumed that Italian employer organisations are involved in this type of collective bargaining. CB, collective bargaining; n.a., not applicable; n.d., no data; SD, social dialogue.*

Source: *Network of Eurofound Correspondents, 2020*

Annex 2: Network of Eurofound correspondents

National correspondents who contributed to this study

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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the textile and clothing sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements.

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identifies IndustriAll Europe – representing employees – and Euratex – representing employers – as the representative European-level social partner organisations in the textile and clothing sector.

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