



Representativeness of the

European social partner organisations:

Graphical industry

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

Introduction

Objectives of the study

The aim of this representativeness study is to identify the relevant national and supranational social actors – the trade unions and employer organisations – in the graphical industry, and to show how these actors relate to the sector's European interest associations of labour and business. The impetus for this study arises from the aim of the European Commission to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) and which are eligible for participation in European sectoral social dialogue committees. The effectiveness of European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the EU Member States.

Concept and methodology

Criteria for inclusion in the study

European associations are analysed via the 'top-down' approach if they:

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

The Commission may decide to include other EU sector-related organisations in the study, if relevant, for example a sector-related organisation which has recently requested consultation under Article 154 TFEU.

Demarcation of the sector

Every sector is demarcated in terms of the Statistical Classification of Economic Activities in the European Community (NACE Rev. 2 codes). All existing sectoral social dialogue committees have been demarcated with a NACE code, which defines the scope of economic activities covered by the committee. The NACE code to be applied in each sectoral representativeness study is confirmed by the European Commission after consultation with the social partners. In this study, the graphical industry is defined as embracing NACE (Rev. 2) 18.11; 18.12; 18.13 and 18.14. This includes the following activities:

- 18.11 – Printing of newspapers;
- 18.12 – Other printing;

- 18.13 – Pre-press and pre-media services;
- 18.14 – Binding and related services.

About the study

The information for the study is collected through 28 national contributions.

Eurofound has a network of national correspondents with expertise in industrial relations in place, covering all Member States. These experts are required to gather data on all relevant organisations at national level and to approach them by telephone or email, using standardised questionnaires. While the questionnaires are in English, correspondents can interview or contact the organisation in the relevant national language. The questionnaires are completed by the national correspondents.

Determining sector-relatedness

European and national social partners are considered to be ‘sector-related’ if their membership domain relates to the sector in one of the ways displayed in Figure 1. Put simply, any organisation organising membership in the sector is deemed to be sector-related.

Figure 1: Sector-relatedness of social partner organisations: Domain patterns



Inclusion of national associations

A national association is considered to be a relevant sector-related interest association if it meets both criteria A and B:

- A. The association’s domain relates to the sector.
- B. The association is either affiliated to a European-level organisation, which is analysed in the study within the top-down approach (independent of their involvement in collective bargaining), or, if not, it is regularly involved in sector-related collective bargaining.

Employment and economic trends

Economic background

The graphical industry is part of the manufacturing industries, producing newspapers, books, periodicals, business forms, greeting cards, identification documents and other printed materials. In the past few years, printing companies have included new value-added services such as

database management for clients and the production of e-documents or websites. According to the European Commission (2014), the main challenges for the graphical industry are:

- the rise of the internet as a source of information and advertising;
- the drop in the number of people reading newspapers and magazines;
- globalised competition – leading to job losses and structural overcapacity.

According to a 2014 economic report by European Federation for Print and Digital Communication (Intergraf), the economic crisis has deeply affected the sector and no real sign of recovery has been recorded so far. Thus, volumes have continued to fall in the graphic print sector at a time when the packaging print sector has been recovering slowly.

Data analysis carried out by Intergraf (2014) shows that the number of European printing establishments has continued to decline and employment levels have also dropped.

With regard to the business strategies followed to cope with the crisis and with the long-term challenges, Intergraf (2014) notes that some businesses have tended to adjust their range of services to ensure that they are able to meet a more varied set of demands from their customer base, especially when it comes to quicker turnaround times in line with the growth of ‘just-in-time’ delivery practices, more demand for shorter run and variable print, and online buying. According to Intergraf, feedback from the industry suggests that printers are investing more time on ensuring that they are making the best use of any new systems they buy in, keeping the presses busy through a mix of long and short-run work and adapting their sales strategy as appropriate.

This movement towards ‘just-in-time’ practices could lead to a situation where the amount of print being produced is becoming more adapted to the actual amount that is required. Although there are still some areas such as retail advertising where there have not been any significant reductions in waste, most of the areas record a more efficient process and this has, in some cases, allowed printers to command the same price for a print run that is slightly shorter.

As far as the differences among the European Member States are concerned, Intergraf (2014) points out that printers in Western Europe will continue the effort to develop their business offer to bring in more added-value opportunities, while in Eastern Europe there is some scope for growth in areas such as printed advertising and even in some publication print – especially magazines. Bearing that in mind, it is also noted that for most of the countries, the major growth opportunities will be in printed packaging in line with rising demand for packaged consumer goods.

Employment characteristics

The European graphical industry employed 814,900 people in 2013, representing around 0.4% of total employment in the European Union, according to the Eurostat European Labour Force Survey (LFS). Men make up the majority of employment, accounting for 68% of the total workforce. The large majority of graphical industry workers (87%) have employee status. (The definition of ‘employment’ is applicable to employees, self-employed people and family workers. The definition of ‘employees’ is only applicable to employees.) This supposes that self-employed people and other non-employee relationships such as family workers are slightly more extended than in the manufacturing sector as a whole (93%).

As far as the business structure is concerned, the sector is highly fragmented since more than 90% of the companies are small and medium-size enterprises (SMEs) employing fewer than 20 workers (European Commission, 2014).

Recent employment trends

Tables 1 and 2 give a general overview of the development of the sector from 2008 to 2013 (or the closest year with available data).

Table 1 presents figures on total employment (2013), differences in employment from 2008 to 2013, female employment as a percentage of total employment in the sector (2013) and the share of sectoral employment as a percentage of total employment in the economy (2013). Table 2 presents data on the number of companies by country and differences in companies from 2008 to 2013. Most of the data comes from national sources. These figures have been collected through Eurofound's network of European correspondents.

Table 1: Employment in the graphical industry 2013

	Total employment	Differences in employment 2008–2013 (%)	Female employment as a % of total employment in the sector	Share of employees in employment in the sector (%)	Share of sectoral employment as a % of total employment in the economy	Source
AT (2012)	11,903	-20	32	95	0.3	Statistik Austria: STATcube; Leistungs- und Strukturstatistik ab 2008
BE	16,877	-11	31	52	0.4	National Social Security Office, National Institute for the Social Security of the Self-employed) and Statistics Belgium from Federal Public Service for the Economy, SMEs, Self-employed and Energy
BG	6,800	n.a.	n.a.	n.a.	n.a.	European Federation for Print and Digital Communication (Intergraf)
CY (2012)	1,122	n.a.	n.a.	n.a.	0.3	Business Register and LFS - (CYSTAT)
CZ	20,400	-27	34	85	0.4	Labour Force Survey/ Czech Statistical Office (CSO)
DE (2012)	203,000	-11	35	74	0.5	Micro census (destatis)/ Federal Employment Agency (BA)
DK	7,249	Na.	31	94	0.3	Statistics Denmark, RAS, Specialrun
EE	2,821	-8	Na.	97	0.6	Statistics Estonia
EL	14,968	-62	40	69	0.4	ELSTAT, LFS 2nd quarter, processed by G. Kritikidis (INE/GSEE)
ES	79,900	-30	22	80	0.5	Spanish Labour Force Survey (Encuesta de Población Activa, EPA)

FI	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FR	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HR	7,720	-8	37	80	0.5	Croatian Bureau of Statistic
HU	n.a.	n.a.	n.a.	n.a.	n.a.	http://www.afsz.hu/syrses/adattar2009/index.html
IE	9,700	-6	n.a.	n.a.	0.5	CSO Quarterly Household National Survey
IT	93,381	-16	30	76	0.4	EUROSTAT, Structural Business Statistics ISTAT, Registro Statistico Imprese Attive (Active Enterprises Statistical Record)
LT	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LU	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LV	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
MT	1,530	18	Na.	94	0.8	National Statistics Office, ad hoc request
NL	24,265	-22.7	26.9%.	7.2%	0.2%	NL Statistical Office (CBS Statline)
PL	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PT	15,631	-29	n.a.	n.a.	0.4	Statistics of aggregate employment published by the National Institute of Statistics (in Internet: http://www.ine.pt/)
RO	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
SE	n.a.	n.a.	n.a.	n.a.	n.a.	Swedish Statistics
SI	4,043	-28	36	91	0.5	Statistical Office of the Republic of Slovenia
SK	5,700	-29	33	83	0.2	Statistical Office of the Slovak Republic (SU SR), LFS
UK	114,900	-32	25	100	0.3	ONS Labour Force Survey (4th quarter)

Notes: Data are for 2013, unless otherwise stated. n.a. = not available. A full list of country codes can be found in Annex 2.

Source: Eurofound's network of European correspondents' national contributions (2014), national statistics

Table 2: Total companies in the graphical industry, 2013

	Number of companies	Differences in companies 2008–2013 (%)	Source
AT (2013)	877	-11	Statistik Austria: STATcube; Leistungs- und Strukturstatistik ab 2008
BE	8,966	9	National Social Security Office, National Institute for the Social Security of the Self-employed and Statistics Belgium from Federal Public Service for the Economy, SMEs, Self-employed and Energy
BG	1,104	10.0	Intergraf
CY (2012)	283	-0.4	Business Register - (CYSTAT)
CZ	8,022	-35	Czech Statistical Office (ČSÚ)
DE (2012)	12,944	-7	Company register (Unternehmensregister) as provided by destatis
DK	842	-21	Statistics Denmark, Firmastatistikken, Special run
EE	332	26	Statistics Estonia
EL	4,109	-45	ELSTAT, LFS 2nd quarter, processed by G. Kritikidis (INE/GSEE)
ES	13,530	-16	DIRCE
FI	916	-20	Statistics Finland
FR (2012)	4,525	-32	IDEP
HR	1,332	-24	n.a.
HU	5,776	11	http://www.ceglista.hu/ceglisak.aspx#fullis
IE	295	-13	CSO Statbank Manufacturing Enterprises
IT	16,248	-9	EUROSTAT, Structural Business Statistics
LT	370	-26	Eurostat, Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E)
LU	93	-2	Statec, IGSS (2014)
LV (2012)	441	5	Yearly survey of enterprises and institutions (CSP)
MT	135	63	National Statistics Office, ad hoc request
NL	3,595	-11.9	Statistics Netherlands (CBS Statline)
PL	n.a.	n.a.	n.a.
PT	2,833	-20	Statistics of enterprises published by the National Institute of Statistics
RO	1,845	-20	Statistical Register of Companies

SE	1,235	-15	Swedish Statistics
SI	938	7	Statistical Office of the Republic of Slovenia
SK	1,498	15	Statistical Office of the Slovak Republic (SU SR), Registry of companies
UK	12,115	-28	Office of National Statistics (ONS)

Note: n.a. = not available.

Source: Eurofound's network of European correspondents' national contributions (2014), national statistics

Data collected through Eurofound's network of European correspondents show that most of the countries have been affected by the crisis. Thus, all the countries with available data record a drop in employment from 2008 to 2013, apart from Malta. In Malta, sectoral employment increased by 17.5%. The country most affected by the crisis is Greece (-62%).

The number of companies has decreased in 19 countries out of the 27 with available data for 2008 and 2013 or years as referenced. With the exception of Belgium, the number of companies increased only in those Member States that joined the EU in 2004 and 2007 (Bulgaria, Estonia, Hungary, Latvia, Malta, Slovakia and Slovenia).

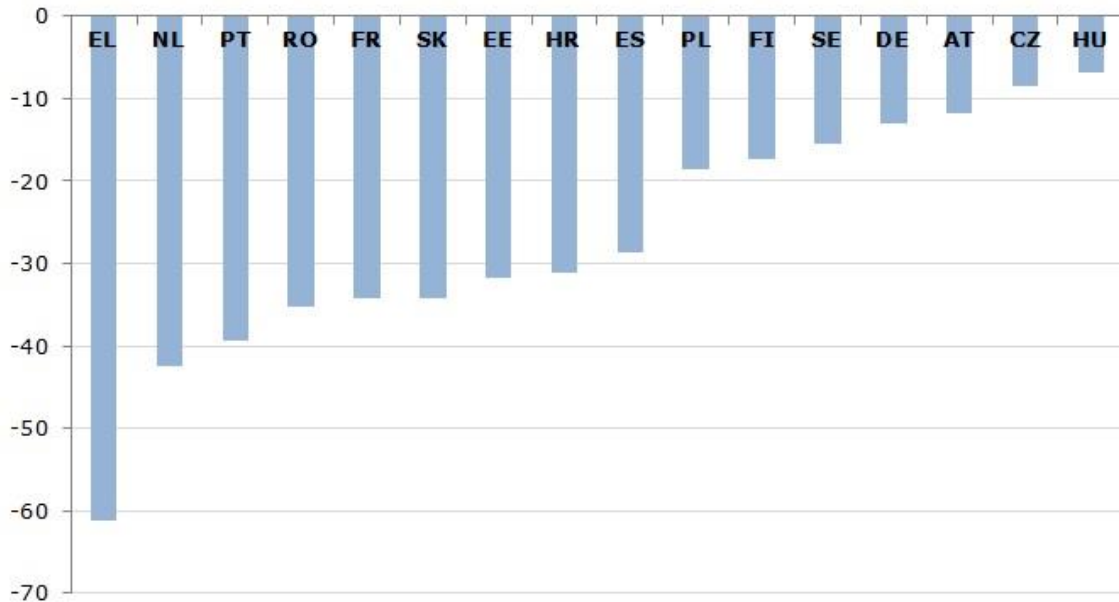
Generally, the decrease in the number of companies reflects a drop in employment, except in Estonia where the number of companies increased and employment fell. This may reflect a process of fragmentation of the sector's company structure.

The data in Table 1 also show that male employment is higher than female employment in all countries with available data. In addition, it shows that self-employment and other non-employee relationships such as family workers are widespread only in countries such as Greece (with more than 30% in 2013) and Belgium, (more than 48%).

Figure 2 provides figures on employment trends from 2008 to 2013 extracted from the EU LFS. Data from the EU LFS do not vary greatly with regard to the data coming from national sources. For all countries with reliable data, a drop in employment is observed (figures from Malta were not reliable due to the small sample size).

According to the EU LFS data, nine of the countries have been deeply hit by the crisis, recording a drop of more than 20% in employment: Greece, the Netherlands, Portugal, Romania, France, Slovakia, Estonia, Croatia and Spain. Attention should be drawn to the case of Croatia, where figures from a national source suggest a lower drop in employment (-8% vs. -31%).

Figure 2: Differences in employment among Member States, 2008–2013

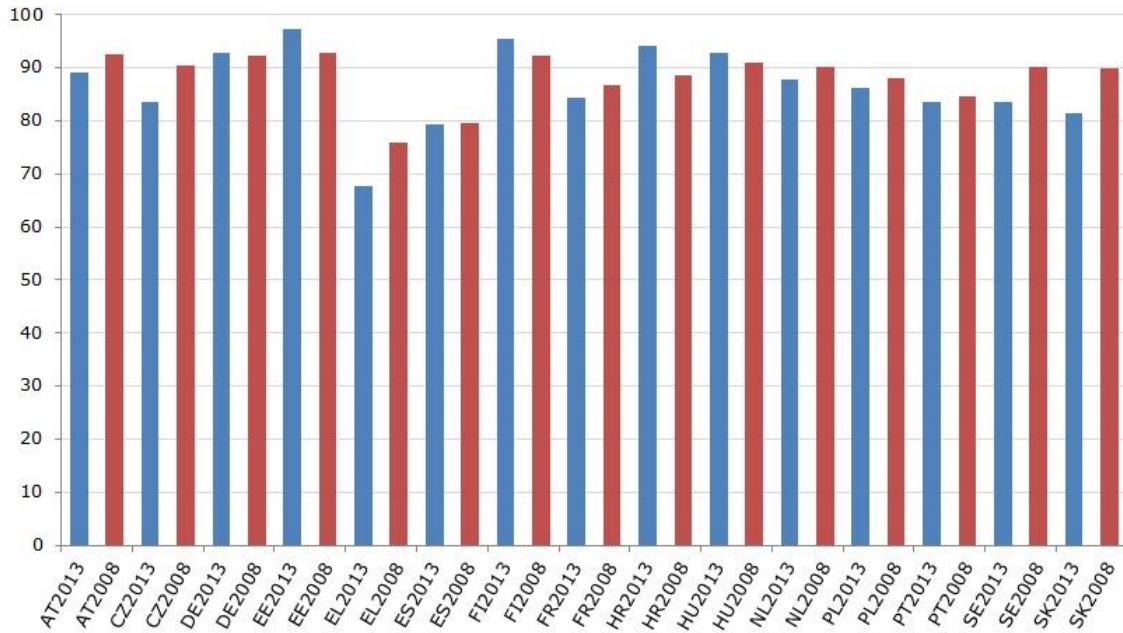


Source: Eurostat, EU LFS

Figure 3 illustrates the share of employees in employment in the countries with available data for 2008 and 2013. The figures, taken from the EU LFS mostly corroborate figures extracted from national sources. They also show first, that self-employment and other non-employee relationships such as family workers are widespread only in countries such as Greece, with more than 30% in 2013 (figures from Belgium were not available). In the other countries, self-employment and other non-employee relationships appear to be low.

However, it is worth noting that the share of employees in employment has remained relatively stable in the majority of the countries over the period. A significant change was recorded in Greece, where the share of employees in employment decreased from 76% in 2008 to 68% in 2013.

Figure 3: Share of employees in employment, 2008–2013



Source: Eurostat, EU LFS

National level of interest representation

The national level analysis of interest representation will focus on:

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

Membership domain and strength

This study will focus on the following quantitative data on membership and relative strength within the graphical industry, which were collected by Eurofound’s network of European correspondents.

Table 3: Definitions of membership

Type of organisation	Membership	Density
Trade union	Number of active members in employment Number of active members in employment in the graphical industry	Sectoral density: Number of active members in employment in the graphical industry divided by the total number of employees in the graphical industry.
Employer organisation	Number of member companies Number of employees working in member companies Number of member companies	Sectoral density (companies): Number of member companies in the graphical industry divided by the total number of companies in the sector. Sectoral density (employees): Number of

	in the graphical industry Number of employees working in member companies in the graphical industry	employees working in member companies in the graphical industry divided by the total number of employees in the graphical industry.
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Trade unions and employee interest representation

Tables A1 and A2 in Annex 1, present the trade unions' data on their domains and membership strength. The tables list all sector-related organisations which are either involved in collective bargaining and/or affiliated to UNI Europa Graphical.

At least one sector-related trade union has been identified in 25 of the countries. Bulgaria, Estonia and Slovakia do not record sector-related trade unions. In total, 55 sector-related trade unions are identified which fulfil the criteria for inclusion in the representativeness study. Only one sector-related trade union is recorded in nine countries, two in nine countries, three unions are observed in two countries, while five countries record four or more sector-related unions, thus showing a fragmented landscape. Accordingly, union landscape is non-fragmented in the majority of the countries although a pluralistic or semi-pluralistic structure exists in more than half of the countries (16 out of 25 countries).

Collective bargaining

Some 45 trade unions, out of 50 with available information, are involved in sector-related collective bargaining (Table A2 in Annex 1). Accordingly, most of the trade unions identified in the study (90%) take part in collective bargaining in the graphical industry. However, in Greece, Latvia and Lithuania, no trade union is involved in collective bargaining because there are no collective agreements in force in these countries.

Domain patterns

Only six trade unions (around 11% of all the unions) demarcate their domain in a way which is congruent with the sectoral definition (see Figure 4 and Table A3 in Annex 1). This implies that statistical definitions of business activities of the sector differ from the lines along which employees identify their interests.

Sectional overlap occurs in 34% of cases (19 trade unions). This is often a result of domain demarcations which focus on certain categories of employees which are then organised across several sectors, including activities outside the graphical industry. Employee categories are specified by various parameters, mostly related to employment status, such as white-collar workers (SETCa – BBTK and LBC-NVK in Belgium, Pro-liitto in Finland, Unionen in Sweden), blue-collar workers (Irish Print Group and Unite in Ireland, GS and SEKO in Sweden) or more specific groups, such as blue-collar workers and white-collar technical workers in the case of ACV-CSC BIE in Belgium. Several unions only cover the private sector (OVIEK-SEK and SEVETTYK-PEO in Cyprus, Unionen in Sweden, SETCa – BBTK and LBC-NVK in Belgium) or certain regions (ELA-STV and LAB Sindikatua in the Basque Country in Spain; LBC-NVK in the Flemish Region in Belgium). In some cases, unions only cover a subsector within the graphical industry, coupled with other activities outside. For instance, FASAP FO and SNP CTFC in France only cover newspaper printing and combine this with live performance and audiovisual activities; SEKO in Sweden only covers the printing of banknotes and other security papers, combined with other activities in communication and services outside the graphical industry.

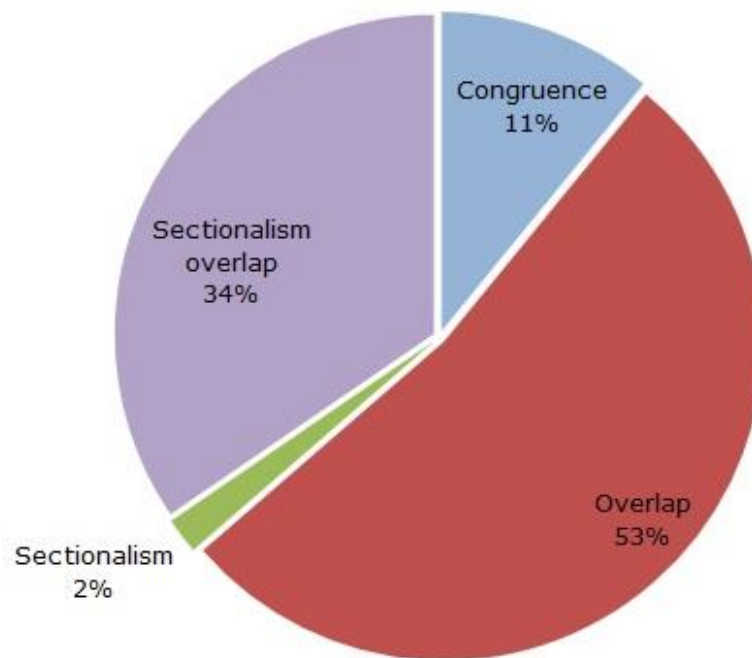
Overlap is the dominant sector-related domain pattern in the graphical industry. It occurs in 53% of cases (29 trade unions). It is because of two main different modes of demarcation. The first one refers to general or cross-sectoral domains (GWU and UHM in Malta, SIMA in Portugal, NSZZ

‘Solidarnosc’ in Poland, Unite in the UK). The second, and more frequent, mode in the sector relates to various forms of multi-sector domains. In some cases, the domain includes all services (CNV in the Netherlands, ver.di in Germany, FSC-CCOO and FSP-UGT in Spain) or all manufacturing branches (such as FIEQUIMETAL, SINDEQ and SINDETELCO in Portugal). In other cases, the domain is more restricted and closely related to the graphical industry but includes activities such as communication, mass media, live performance, cultural activities (FILPAC-CGT and F3C CFDT in France, OMTVX and the Greek National Graphical Industry Workers’ Union in Greece, SLC-CGIL, FISTEL - CISL, Uilcom – Uil and UGL Carta e Stampa in Italy, OGBL Syndicat Imprimerie, Média et Culture - FLTL in Luxembourg, and the Lithuanian Trade Union Federation of Cultural Workers LKDPPF in Lithuania).

Finally, sectionalism is recorded only in one trade union (OS TB in the Czech Republic). This is because the union does not cover the whole country (eight regions are not covered).

The domain description of all the unions can be found in Table A3 in Annex 1.

Figure 4: Graphical industry-related trade unions and their domain patterns



Note: N = 55.

Source: Author’s own elaboration, based on contributions from Eurofound’s network of European correspondents, 2014

Membership figures and organisational strength within the sector

Membership of the sector-related trade union is voluntary in the 25 countries examined.

The number of active trade union members differs widely, ranging from around 25,000 (Unite in the UK) to fewer than 1,000 (and lowest in LPNA in Latvia, SEKO in Sweden or DE UNIE in the Netherlands) (Table A1 in Annex 1).

This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain, rather than the ability to recruit members. Therefore, density is a more appropriate measure of membership strength for comparative analysis. In this context, it should be noted that density figures in this section refer to net ratios, which means that they are calculated on the basis of active employees only, rather than taking all union members (those who are in work and those who are not) into account. This is mainly because research usually considers net union densities as more informative than gross densities, since the former measure tends to reflect unionisation trends among the employees more quickly and accurately than the latter, since only employees are capable of taking industrial action. When looking at sector density (again referring only to active members), it is important to differentiate between the trade unions' sectoral density and their domain density. The domain, or overall density, must be higher than the sectoral density if a trade union organises a particular part of the sector – that is, where the trade union's membership domain is sectionalist – and equally if a trade union organises the whole sector as it is defined in the study – that is, where the trade union's membership domain is congruent. This study only examines sectoral density.

Sectoral density rates are available only for a third of the sector-related organisations covered (18 out of 55 cases) (Table A2 in Annex 1). Statistics show that:

- sectoral density exceeds 95% in only one of the trade unions (HK/Privat in Denmark);
- 22% (four) of the trade unions claim to represent between 30% and 55% of the sectoral employees;
- 33% (six) of the trade unions claim to represent between 15% and 30% of the sectors' employees;
- 11% (two) of the trade unions claim to organise between 10% and 15% of employees in the sector;
- 28% (five) of the trade unions record a sector density rate of less than 5% of employees in the sector.

Bearing this in mind, it can be stated that low and very low sectoral densities prevail in the sector. However, these figures must be read with caution due to the low percentage of trade unions that recorded information on sectoral membership.

Employer organisations

Tables A4 and A6 in Annex 1 present membership data for the employers' organisations in the graphical industry. Sectoral employers' organisations are identified in 23 European Member States (there are no sector-related employers' organisations in Croatia, Lithuania, Slovakia, Poland and Romania)

In total, 46 sector-related employers' organisations are identified; 11 countries record only one employer organisation, seven countries record two employer organisations, three countries three employer organisations and two countries four or more employer organisations.

Collective bargaining

Employer organisations are involved in collective bargaining in 18 countries (Table A5 in Annex 1). In five countries (Bulgaria, Estonia, Greece, Hungary and Malta) none of the sectoral employer associations included in the study is involved in collective bargaining. In the UK, one of the employer associations included in the study is not involved in collective bargaining (BPIF).

Generally, business organisations may also deal with interests other than those related to industrial relations. Organisations specialising in matters other than industrial relations are commonly defined as 'trade associations' (see [Behrens and Traxler, 2004](#)). Bearing this in mind, it could be assumed that all eight organisations not involved in collective bargaining (see Table

A5 in Annex 1), either primary or exclusively act as trade organisations in their country. All these organisations are members of the sectoral European-level employer organisations. In this sense, according to the selection criteria described above, all national organisations affiliated to the European-level employer association are included in the study irrespective of whether they are involved in collective bargaining.

It is worth noting the case of Greece, where the three organisations included are neither involved in collective bargaining nor affiliated to the European employer association Intergraf. However, an unsuccessful attempt to conduct collective bargaining in the graphical industry was made in 2013. Moreover, in this country, the three employer organisations included were involved in sectoral collective bargaining until 2012, when a Ministerial Decision (No. 6/2012) imposed by the Troika, ruled the expiration of all collective agreements in force which were of indefinite duration or which lasted more than three years.

Domain patterns

With regard to the domain patterns of the employer organisations, sectionalist overlap is the most widespread domain pattern, although followed closely by the others (Figure 5 and Table A6 in Annex 1).

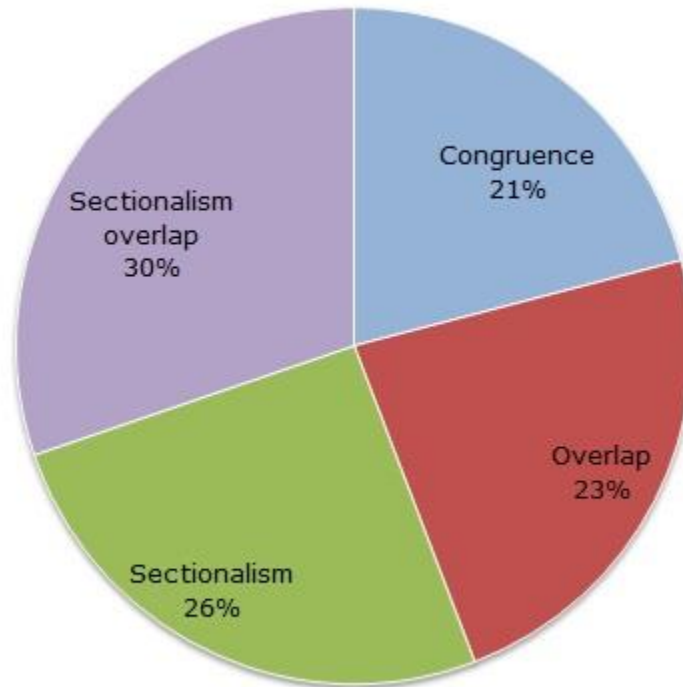
Sectionalist overlap occurs in 30% of the cases. It is usually explained by domain demarcation which excludes some activities or subsectors within the graphical industry (such as printing, pre-press or pre-media activities), or covers only certain companies (such as small ones or artisan manufacturers) and other activities outside the sector such as packaging (GA in Denmark), flexographic, engraving, further processing or media companies mainly producing text, audio- and picture formats for digital media (bvdm in Germany), or high-tech and communication activities (CNA in Italy).

Sectionalism occurs in 26% of the cases. It is caused by domain demarcations which cover only certain companies, such as small and medium enterprises (Confartigianato Grafici in Italy), or cover only some specific subsectors within the graphical industry. For instance, several organisations do not cover newspaper printing (Pancyprian Master Printers Association in Cyprus and FEIGRAF in Spain) while others cover only this subsector (AEDE in Spain).

Cases of domain overlap (23% of the cases) arise from employer organisations that have a cross-sectoral domain (ZDS in Slovenia, addressed to all industrial employers) or from organisations that cover different sectors and activities outside the graphical industry, such as suppliers to printing (BPIF in UK), printing and paper making (Nyomda- és Papíripari Szövetség in Hungary) or the entire media sector (VKL in Finland).

Finally, 21% of the associations show a membership domain that is more or less congruent with the sector definition. This means that the domain of these organisations largely focuses on the graphical industry as defined for the purpose of this study. Accordingly, more employer organisations than trade unions (11%) are developing their activities according to the sectoral definition used in this study.

Figure 5: Graphical industry-related organisations/business associations and their domain patterns



Note: N = 43.

Source: Author's interpretation of national contributions by Eurofound's network of European correspondents, 2014

Membership figures and organisational strength within the sector

A first aspect to note is that only in Austria do sector-related employer organisations rely on obligatory membership. However, it is worth noting that the most important employer organisation in the graphical industry is the Association of Printing and Media Technology Enterprises (VDMT), a voluntary employer organisation which does not form part of the Austrian Federal Economic Chamber (WKO) structure. VDMT concludes by far the most encompassing sectoral collective agreement with the GPA-djp. As far as the sectoral density of the employer organisations is concerned, figures are available for 31 organisations in terms of companies and 10 organisations in terms of employees.

Sectoral domain densities for companies vary greatly across organisations. Density is above 50% in some cases (FEIGRAF in Spain; FEBELGRA in Belgium; GA in Denmark) while it is less than 1% in several organisations (AEDE, Spain; GES, UK; SPP, Czech Republic; FIEG, Italy; Fédération des Scop de la Communication, France; Nyomda- és Papíripari Szövetség, Hungary). Sectoral domain density for employees show less variation, with six organisations having above 50% and only one below 1%.

When information is available for both kinds of densities (10 cases), the sectoral domain densities of companies are lower than the densities in terms of employees. This could indicate a higher propensity of the larger companies to associate, as compared with their smaller counterparts.

Collective bargaining and its actors

Tables A2 and A5 in Annex 1 list all social partners engaged in sector-related collective bargaining. Figure 6 shows the involvement of the organisations in collective bargaining.

With regard to the trade unions, 92% of sector-related trade unions with available information record participation in collective bargaining. Some 42% show participation in multi-employer bargaining, 38% record participation both in single- and multi-employer bargaining, and 12% record participation in multi-employer bargaining only.

As for employer organisations, 80% of all employer organisations with available information record participation in collective bargaining. Some 67.5% record participation in multi-employer bargaining, 10% record participation both in single- and multi-employer bargaining and 2.5% record participation only in single-employer bargaining (SPP in Czech Republic).

Figure 6: Involvement of included organisations in different forms of collective bargaining (% of total organisations within the study)



Source: Author's own elaboration, based on contributions from Eurofound's network of European correspondents, 2014

The data presented in Table 4 provide an overview of the system of sector-related collective bargaining in the 28 countries under consideration. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (see Traxler et al, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

Table 4: System of sectoral collective bargaining, 2013

	CBC (%) (estimates)	Share of MEB (%) (estimates)	Extension practices
AT	68% (100% after extension)	100%	1 (to all the employers due to the compulsory membership)
BE	100%	100%	2
BG	0%	0%	0
CY	53%	MEB prevailing	0
CZ	10%	0%	0
DE	50%	65%	0
DK	50%–60%	75%	0
EE	0%	0%	0
EL	0%	0%	0 c
ES	100%	n.a.	2
FI	90%	90%	2
FR	100%	MEB prevailing	2
HR	60%	0%	0
HU	25%	0%	0
IE	n.a.	n.a.	0
IT	n.a.	n.a.	2 de facto (but not de jure)
LT	0%	0%	n/a
LU	100%	100%	2
LV	n.a.	0%	2
MT	50%	0%	n/a
NL	100%	MEB prevailing	2
PL	n.a.	0%	n/a
PT	100%	100%	1
RO	0% since 2011	n.a.	0 c

SE	90%	90%	2 for blue-collar workers, 1 for white-collar workers and managers
SI	50%	MEB prevailing	1
SK	30%	0%	0
UK	19%	SEB prevailing	0

Notes: CBC = collective bargaining coverage: employees covered by a collective agreement as a percentage of the total number of employees in the sector;

MEB = multi-employer bargaining relative to single-employer bargaining;

SEB = single-employer bargaining;

a = 0 = no practice, 1 = limited/exceptional, 2= pervasive. Cases of functional equivalence are put in parenthesis;

b = informal extension practices regarding wage agreements;

c = extension practices abolished or limited in 2011, 2012 or 2013;

n.a. = not available;

n/a = not applicable.

Source: Author's own elaboration, based on contributions from Eurofound's network of European correspondents, 2014

Collective bargaining coverage

All the countries, except Bulgaria, Estonia, Greece, Lithuania and Romania, record some form of collective bargaining in the graphical industry. However, only in a relatively low number of countries where multi-employer is the only bargaining level or the most important one, multi-employer collective agreements are more or less congruent with the sectoral definition used in this study. This happens in Austria, Belgium, France and Slovenia. In other countries, some activities such as newspaper printing or digital printing are excluded from the graphical industries' collective agreements and/or have specific agreements. This happens, for instance, in Portugal, Sweden, Cyprus or Germany. In other countries, collective agreements in the graphical industry embrace activities that are included in this study's definition, such as the packaging sector, publishing activities or media and cultural activities. This is the case in Spain, Denmark and Luxembourg.

In Greece and Romania, there has been no collective agreement in force since 2012 and 2011 respectively. In Greece, an unsuccessful attempt to conclude collective bargaining in this sector was made in 2013.

Attention should also be drawn to the case of Slovakia, where only single-employer bargaining occurs and trade unions are not directly involved in the negotiation of agreements. Company collective agreements are concluded by the so-called basic organisations operating in these companies, some of which have direct links with sectoral trade unions. This situation explains why there are collective agreements in force in Slovakia but no trade unions recorded.

The sector's collective bargaining coverage differs widely by country, as outlined Table 5. However, it is possible to identify nine countries, mostly Nordic and Centre-West EU countries that record high collective bargaining coverage exceeding 80%. These countries are Austria, Belgium, Luxembourg, Portugal, Spain, Finland, France, the Netherlands and Sweden.

Attention should be drawn to Austria. Although, within the Austrian collective bargaining system, extension practices are unusual, the most important collective agreement in force in the

graphical industry includes this practice. This situation is because the employer organisation that concluded this collective agreement, the Association of Printing and Media Technology Enterprises (VDMT), is a voluntary employer organisation which does not form part of the Austrian Federal Economic Chamber (WKO) structure. This configuration is unusual in Austria since most private sector collective bargaining is carried out by the responsible branch subunits of the mandatory WKO. In the case of the graphical industry, although all the companies active in this sector have to be a member of the responsible WKO-branch subunit, that is the Association of the Graphical Industry (Fachverband Druck, FV Druck), the voluntary VDMT is the lawful bargaining party because the Austrian Labour Constitution gives voluntary associations the privilege to conclude collective agreements over mandatory associations. Since not all sectoral companies are members of VDMT, the sectoral agreement covers only the member firms and thus about 68% of the sector's employees. However, through an extension order issued by the Federal Arbitration Board in April 2014 the sectoral collective agreement was extended to include employment relationships of essentially the same nature which are not covered by the agreement. As a consequence, the collective bargaining coverage rate in the sector comes close to 100%.

It is also worth noting the Portuguese situation. In 2009, the Portuguese Ministry of Labour used, for the first time, the legal opportunity of issuing a 'mandatory arbitration'. This decision referred to the branch agreement signed on the employer side by APIGRAF and on the union side by STICPGI/CGTP in the graphical sector (except printing). In the following year (2010), the ministry extended this decision at the request of the signatories APIGRAF and STICPGI/CGTP (and also by the unions SINDETELCO/UGT, SINDEQ/UGT and FETESE/UGT) by decree to the entire graphical industries sector. Since then, no further collective agreements have been signed in the sector and the mandatory arbitration is still in force.

There is also a second group that can be identified, of countries with collective bargaining coverage rates that oscillate between 35% and 70%. These countries are Cyprus, Germany, Denmark, Slovenia, Croatia and Malta.

A third group of four countries, mostly Centre-East EU countries, record collective bargaining coverage rates lower than 30%. These countries are the UK, the Czech Republic, Hungary and Slovakia. In Slovakia, however, collective bargaining takes place only at company level, where single-employer collective agreements are concluded at some companies. Company collective agreements are concluded by some specific trade union organisations placed at the company level (so-called basic organisations of the association ZO OZ). These organisations are not trade unions and were therefore not included in the national contribution to this study.

Table 5: Collective bargaining coverage and collective bargaining level, 2013

	Collective bargaining coverage >80%	Collective bargaining coverage 35%–70%	Collective bargaining coverage <30%	No information available
Multi-employer collective bargaining	AT, BE, LU, PT			
Both single- and multi-employer collective bargaining	ES, FI, FR, NL, SE	CY, DE, DK, SI	UK	
Single-employer collective bargaining		HR, MT	CZ, HU, SK	

No information available				IE, IT, LV, PL
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Source: Author's own elaboration, based on contributions from Eurofound's network of European correspondents, 2014

In general, several factors which sometimes interact with each other explain differences in collective bargaining coverage rates. In all the countries that record high collective bargaining coverage rates, multi-employer is the only bargaining level or the most important one. Also, extension practices, whether pervasive or limited, exist in all these countries. However, the four countries that record low collective bargaining coverage rates, lower than 30%, are characterised by the predominance of single-employer bargaining. Thus, in the Czech Republic, Hungary and Slovakia, collective bargaining is carried out only at company level while, in the UK, single-employer is the dominant bargaining level.

Participation in public policymaking

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

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

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

Trade unions or interest representations

Some 33 of the 44 (75%) sector-related trade unions with available data have been consulted. Authorities consult unions in all the countries in which there are sector-related unions except Cyprus, the Czech Republic, Germany, Poland, Portugal and Slovenia. Only eight trade unions report that they are regularly consulted. These trade unions are in Belgium, Denmark, Finland and Latvia.

Since there is a multi-union system in 16 of the 25 countries with sector-related trade unions, the authorities favouring certain trade unions over others cannot be ruled out, nor can unions competing for participation rights. In almost all countries with a multi-union system where a noticeable practice of consultation is observed, any existing trade union may take part in the consultation process. In contrast, in Spain, only some of the sector-related trade unions are consulted, while in other countries information about consultation is available only for some unions (France, Ireland, Italy, Luxembourg and Sweden).

Employer organisations or business associations

Authorities consult 32 of the 39 (82%) employer organisations. Employer organisations are consulted by the government in all the countries with sector-related organisations except in Cyprus, the Czech Republic and Slovenia (no available information in Ireland). Some 12 organisations are regularly consulted in the following countries: Austria, Belgium, Denmark, Finland, Italy, Latvia, Portugal and the UK.

From the countries with a multi-organisation system where a practice of consultation is recorded, in Belgium, France, Latvia, the Netherlands and Sweden, all the existing employer organisations may take part in the consultation process. However, in Greece and Spain, only some of the existing employer organisations take part in the consultation process. In the case of Austria, Italy and the UK, there is no information available for all the organisations.

Tripartite participation

Genuine sector specific bodies have been established in 15 of the 28 countries under consideration (Table 6). Sector-specific bodies, whether bipartite or tripartite, have been established in Belgium, Bulgaria, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Slovakia, Sweden and the UK. In Bulgaria, however, social partners report that the tripartite body has not been active in recent years.

In Denmark, Finland, France and the UK, there are several bodies dealing with different issues.

Only a few countries report information about the scope of activity of the tripartite and bipartite bodies. When information is available one can find bodies dealing with general working conditions (Bulgaria), social dialogue issues except wages (the Czech Republic, Hungary), safety at work and occupational well-being (Finland and the UK), education or vocational training (Denmark, Finland, Italy, Sweden), the environment (Denmark), management of social security funds and pensions (Greece and the UK), and employment and working conditions (Slovakia).

Table 6: Tripartite and bipartite sector-specific boards participating in public policymaking, 2014

	Name of body and scope of activity	Bipartite or tripartite	Origin	Trade unions participating	Employer organisations participating
BE	Joint committee 130	Bipartite	Statutory	Confederation of Christian Trade Unions, building, industry & energy (Confédération des Syndicats Chrétiens – bâtiment, industrie & energie/ Algemeen Christelijk Vakverbond – bouw, industrie & energie); Union of White-Collar Staff, Technicians and Managers (Syndicats des Employés, Techniciens et Cadres/ Bond van Bedienden, Technici en Kaderleden, SETCa – BBTK); National	Belgian Federation of Graphical Industries (Fédération Belge des Industries Graphiques/ Federatie van de Belgische Industrie - FEBELGRA); Belgian Association of Newspapers' Editors (Association Belge Des éditeurs de Journaux/Belgische Vereniging van de Dagbladuitgevers, ABEJ-BVDU)

				Union of Employees (Landelijke Bedienden Centrale, LBC-NVK)	
BG	Sectoral Council of working conditions 'Electrical, electronics, culture and printing industry'	Tripartite	Under the aegis of the Ministry of Economics	Trade unions from other sectors, not from the graphical industry	PIUB
CZ	Bipartite dialogue 2 (Bipartitní dialog 2) - Strengthening of social dialogue and building of capacities of social partners (Posilování sociálního dialogu a budování kapacit sociálních partnerů)	Bipartite	Agreement	Typografická beseda (OS TB)	Svaz polygrafických podnikatelů (SPP)
DE	Zentraler Fachausschuss für die Berufsbildung Druck und Medien	Bipartite	Agreement	ver.di	bvdm
DK	Graphic Education Committee (Grafisk Uddannelsesudvalg)	Tripartite	Statutory	HK/Privat	GA DMA
	Graphic Working Environment	Tripartite	Statutory	HK/Privat, 3F	Emballageindustrien (under Confederation of Danish Industry, DI)

	Committee (Grafisk BAR)				
EL	Unified Mass Media Personnel Social Security Fund (ETAP) – Issues pertaining to the Social Security Fund (ETAP)	Tripartite	Statutory	Greek National Graphical Industry Workers' Union	(employer organisations from the mass media sector participate therein)
FI	Educational committee for the media branch (Viestintäalan koulutustoimikunnan)	Tripartite (Finnish National Board of Education as public authority)	Agreement	Trade Union Pro and Industrial Union TEAM, as well as other trade unions involved in the media branch	Finnmedia
	Graphic Industry Safety Branch Committee under the Centre for Occupational Safety (Graafisenteollisuuden turvallisuuskeskus)	Tripartite	Agreement	Trade Union Pro and Industrial Union TEAM	Finnmedia
FR	Commission Paritaire de la Convention collective nationale de l'imprimerie et des industries graphiques	Bipartite	Collective agreement	CGT, CGT-FO, CFDT, CFTC, CFE-CGC	UNIC, GMI, Fédération Scop Communication, FESPA
	OPCA CGM	Bipartite	Collective agreement	n.a.	n.a.
	Institut de	Bipartite	Collective	CGT, CGT-FO,	UNIC, GMI,

	développement et d'expertise du plurimédia		agreement	CFDT, CFTC, CFE-CGC	Fédération Scop Communication, FESPA
HU	Graphical Industry Sectoral Dialogue Committee (Nyomdaipari Ágazati Párbeszéd Bizottság, NYÁPB)	Bipartite	Bilateral agreement in 2006, then re-established in 2010 within the newly introduced legal framework according to Act LXXIV of 2009	Hungarian Printing Workers' Union (Nyomdaipari Dolgozók Szakszervezete, NYDSZ)	Federation of Hungarian Printers and Papermakers (Nyomda- és Papíripari Szövetség)
IE	Print and Packaging Forum	Tripartite	Agreement	Irish Print Group (SIPTU)	Irish Printing Federation (Ibec)
IT	ENIPG – Ente Nazionale Istruzione Professionale Grafica	Bipartite	NCBA 20 July 1989 NCBA 13 December 1992	SLC-CGIL FISTEL-CISL UILCOM-UIL	Assografici FIEG ASIG
LV	Expert Council of Graphical Industry, Publishing, Manufacturing of Paper and Paper Production and Computer Design	Tripartite	Agreement		
SE	Delegation for vocational introduction jobs	Tripartite	Dir. 2014:51	GS	Almega
SK	Economic and Social Council (HSR)	Tripartite	Agreement	SOZ PP - indirectly as a member of KOZ SR	ZPNS - indirectly as a member of RUZ SR Europska polygraficka asociacia indirectly as a member of AZZZ SR
UK	Printing Industry Pension Scheme (PIPS)	Bipartite	Agreement	Unite	BPIF

	Health and Safety Executive (HSE) Printing Industry Advisory Committee (PIAC).	Tripartite	Statutory	Unite	BPIF

Note: n.a. = not available.

Source: Author's own elaboration, based on contributions from Eurofound's network of European correspondents, 2014

European level of interest representation

At European level, eligibility for consultation and participation in social dialogue are linked to three criteria laid down in [Commission Decision on the establishment of Sectoral Dialogue Committees \(98/500/EC\)](#). Accordingly, social partner organisations must:

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

In terms of social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. This section will analyse these organisations' membership domain, membership composition and capacity to negotiate of European associations in the graphical industry.

The study presents detailed data on one sector-related European association on the employee side (UNI Europa Graphical) and one on the employer side (Intergraf). Both associations are members of the European Social Dialogue Committee of the graphical industry and are listed by the European Commission as social partner organisations consulted under Article 154 of the TFEU. The following analysis concentrates on these organisations.

Membership domain

According to its website, UNI Europa Graphical belongs to UNI Graphical & Packaging, the global union that claims to represent 800,000 members from over 150 trade unions. UNI Europa Graphical works together with the European Trade Union Confederation (ETUC), acting as the ETUC's recognised industry federation for the graphical and allied industries.

According to its website, Intergraf promotes and protects the interests of the printing and graphic industry in Europe. It has 22 members in 20 European countries, including countries outside the European Union (Switzerland and Norway). Its main task is to promote and enhance the interests of the printing and digital communication industries and to work with the European institutions to support the sectors' competitiveness.

Membership composition

Table 7 provides a list of membership-related trade unions for UNI Europa Graphical drawn from the country reports. This membership list is confined to the sector-related associations of the countries under consideration; hence it does not include trade unions affiliated to the European-level organisations which do not have any members in the graphical industry. The membership of the employee organisations is obtained through the membership list provided by the organisations and a further check of the membership lists published on the organisations' web pages.

Table 7: Graphical industries trade unions affiliated to UNI Europa Graphical

	Trade union	Collective bargaining	Geographical coverage
AT	GPA-djp	Multi-employer bargaining	Whole country
BE	SETCa-BBTK	Both, multi- and single-employer bargaining	Whole country
BE	LBC-NVK	Both, multi- and single-employer bargaining	Only active in the Flemish region
BE	ACV-CSE BIE	Both, multi- and single-employer bargaining	Whole country
CY	SEVETTYK-PEO	Both, multi- and single-employer bargaining	Whole country
CY	OVIEK-SEK	Both, multi- and single-employer bargaining	Whole country
DE	ver.di	Both, multi- and single-employer bargaining	Whole country
DK	HK/Privat	Both, multi- and single-employer bargaining	Whole country
ES	FSP-UGT	Both, multi- and single-employer bargaining	Whole country
ES	FSC-CCOO	Both, multi- and single-employer bargaining	Whole country
FI	TEAM	Multi-employer bargaining	Whole country
FR	F3C CFDT	Both, multi- and single-employer bargaining	Whole country
FR	FILPAC-CGT	Both, multi- and single-employer bargaining	Whole country
HR	Trade Union in Printing and Publishing Industry of Croatia	Single-employer bargaining	Whole country
HU	NYDSZ	Single-employer	Whole country

		bargaining	
IT	FISTEL-CISL	Both, multi- and single-employer bargaining	Whole country
IT	SLC-CGIL	Both, multi- and single-employer bargaining	Whole country
LT	LKDPF	No bargaining	Whole country
LU	OGBL	Multi-employer bargaining	Whole country
LV	LPNA via LKDAF	No bargaining	Whole country
MT	GWU	Single-employer bargaining	Whole country
NL	FNV KIEM	Multi-employer bargaining	Whole country
PL	ZZPPP	Single-employer bargaining	Whole country
PT	SINDETELCO	Multi-employer bargaining	Whole country
SE	GS	Multi-employer bargaining	Whole country
SE	Unionen	Multi-employer bargaining	Whole country
SI	Pergam	Multi-employer bargaining	Whole country
UK	Unite	Both, multi- and single-employer bargaining	Whole country

Source: Author's own elaboration, based on contributions from Eurofound's network of European correspondents, 2014

In 21 out of 25 countries with sectoral-related unions, at least one sectoral affiliation to UNI Europa Graphical is found. In Bulgaria, Estonia and Slovakia, the study did not identify trade unions meeting the criteria to be included. The four countries in which there is no sectoral affiliation are the Czech Republic, Greece, Ireland and Romania. UNI Europa Graphical has 28 direct affiliations from the 21 countries under consideration. Therefore, 51% of the trade unions listed in Tables A1 and A2 in Annex 1 are directly affiliated to UNI Europa Graphical.

Some 26 out of the 28 trade unions affiliated to UNI Europa Graphical are involved in sectoral collective bargaining. LKDPF in Lithuania and LPNA in Latvia are not involved. Moreover, all the unions affiliated to UNI Europa Graphical cover the sector in all the regions of their countries except LBC-NVK in Belgium, which is active only in the Flemish region.

Although the coverage of organisations recorded by UNI Europa Graphical in the graphical industry may seem relatively low at first glance (51%), a comparison with other European trade unions present in other Sectoral Social Dialogue Committees (see the representativeness studies on woodworking, electricity, chemical, textile and clothing, or food and drink) reveals that it is in fact close to the average. Bearing this in mind, it is important to check if some major national trade unions are not covered. For this purpose, it can be assumed that major trade unions are those that are active in the whole country, conduct collective bargaining, have a relatively high level of membership and have opportunities to intervene in the national decision-making process.

The analysis of the organisations which are not affiliated to UNI Europa Graphical reveals that there are 20 trade unions not covered in 13 countries that are involved in collective bargaining, from which only three are exclusively involved in single-employer bargaining. All these organisations are active in the whole country except the two trade unions not covered in Spain, which are active only in the Basque Country (LAB Sindikatua and ELA-STV). From these 20 trade unions, 11 are also consulted by public authorities in issues affecting the sector.

Sectoral density rates are only available for five of these trade unions and only two of them record densities higher than 5%: UHM in Malta (33%) and the Irish Print Group in Ireland (21%). (The Irish Print Group is part of SIPTU, which is affiliated to UNI Europa. However, the Irish Print Group is not a direct member of Uni Europa Graphical.) These could be considered major trade unions not covered by UNI Europa Graphical.

Table 8 lists the employer organisations' members of Intergraf. Again, this membership list is confined to the sector-related associations of the countries under consideration; hence it does not include employer organisations affiliated to the European-level organisations which do not have any members in the graphical industry.

Table 8: Graphical industries employer organisations affiliated to Intergraf, 2014

	Employer organisation	Collective bargaining	Geographical coverage
AT	PPV	Multi-employer bargaining	Whole country
AT	VDMT	Multi-employer bargaining	Whole country
BE	FEBELGRA	Both, multi- and single-employer bargaining	Whole country
BG	СПИБ/PIUB	No bargaining	Whole country
DE	Bvdm	Multi-employer bargaining	Whole country
DK	GA (now: GRAKOM)	Multi-employer bargaining	Whole country
EE	ETTL	No bargaining	Whole country
ES	FEIGRAF	Multi-employer bargaining	Whole country
FI	VKL (through member organisation Graafinenteollisuus ry)	Multi-employer bargaining	Whole country
FR	UNIC	Multi-employer bargaining	Whole country

HU	Federation of Hungarian Printers and Papermakers	No bargaining	Whole country
IT	ASSOGRAFICI	Both, multi- and single-employer bargaining	Whole country
LU	AMIL	Multi-employer bargaining	Whole country
LV	LPUA	Multi-employer bargaining	Whole country
MT	MPIA	No bargaining	Whole country
NL	KVGO	Multi-employer bargaining	Whole country
PT	APIGRAF	Multi-employer bargaining	Whole country
SE	GFF	Multi-employer bargaining	Whole country
UK	BPIF	No bargaining	Whole country
UK	GES	Multi-employer bargaining	Only in Scotland

Source: Author's own elaboration, based on contributions from Eurofound's network of European correspondents, 2014

Intergraf has 20 sectoral affiliations in 18 countries (two sectoral affiliations in Austria and the UK). Therefore, 43% of the employer organisations listed in Tables A4 and A5 in Annex 1 are directly affiliated to Intergraf.

As previously shown, there are no sector-related employer organisations in Croatia, Lithuania, Poland, Romania or Slovakia. Therefore, the five countries in which there is no sectoral affiliation to Intergraf are Cyprus, the Czech Republic, Greece, Ireland and Slovenia. It is worth noting that the Greek employer association SEMEE cancelled its affiliation in 2012.

Some 15 out of the 20 employer organisations affiliated to Intergraf are involved in sectoral collective bargaining. However, all the employer organisations affiliated to Intergraf cover the sector in all the regions of their countries except GES in the UK, which is active only in Scotland.

Again, although coverage of organisations recorded by Intergraf in the graphical industry (43%) may seem relatively low at first glance, a comparison with other European employer organisations present in other Sectoral Social Dialogue Committees (see the representativeness studies on woodworking, electricity, chemicals, textile and clothing, or food and drink) reveals that it is close to the average. Accordingly, it is necessary to check if some important employer organisations are not covered. For this purpose, it can be assumed that important employer organisations are those that are active in the whole country, conduct collective bargaining, have a relatively high level of membership and have opportunities to intervene in the national decision-making process.

This analysis reveals that 18 out of the 27 organisations not covered are party to collective bargaining. These 18 organisations are present in nine countries and all of them but one (ADEGI in Spain) are active in the whole country. Thus, in some countries with a pluralistic or semi-pluralistic employer organisation system (Austria, Belgium, Italy, the Netherlands, Spain and Sweden), some of the organisations involved in collective bargaining are not members of Intergraf. Of these 18 organisations involved in collective bargaining, 14 of them are consulted by public authorities on sector-related issues.

Sectoral density rates in terms of companies are available for 11 employer organisations out of those 18 involved in collective bargaining (rates in terms of employees are only available for one organisation). Only three employer organisations record a sectoral density rate higher than 10%: BI KHW in Austria (13%), Confartigianato Grafici in Italy (37%) and Almega in Sweden (15%). These could be considered important employer organisations not covered by Intergraf.

Capacity to negotiate

The European sectoral social partners should be able to prove their capacity to negotiate on behalf of their members and to enter into ‘contractual relations, including agreements’ (Article 155 TFEU), for example, the capacity to commit themselves and their national affiliates. This criterion refers to the capacity to negotiate agreements as provided for in Article 155 of the TFEU; negotiating other types of joint texts such as joint opinions, frameworks of action and guidelines is not considered to be sufficient in this context.

A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate in accordance with a given mandating procedure.

The mandate/mandating procedure can be either statutory, that is laid down in the statutes (constitution) of the organisation or annexed to them, or non-statutory, that is laid down in secondary (formal) documents, such as rules of procedures, memoranda of understanding or decisions by the governing bodies of the organisation. The mandate will be described in terms of the conditions and procedure for the European social partner organisation to be given the authorisation to enter into a specific negotiation, as well as for the ratification of a possible agreement. If no such formal mandating procedure can be identified, it should be considered that the condition concerned is not fulfilled.

In order to check this criterion, the European social partners from the graphical industry, Intergraf and UNI Europa Graphical, were asked to provide proof of their statutes or any other written documentation, describing their mandate and capacity to negotiate, as well as the ratification procedures in place within their organisation.

When Intergraf was queried in 2013 about its capacity to negotiate agreements in the context of the preliminary assessment of representativeness in view of the creation of the sectoral social dialogue committee, it replied that it has such capacity, as it ‘is recognised as [the] official representative of the employers of the graphic industries at European level. Its members have the capacity to negotiate collective agreements at *national level*’.

According to Intergraf legal statutes, the General Assembly, which is its governing body, has full power to carry out Intergraf’s goals, which include issues such as approval of budgets or the exclusion of member associations but there is no reference to social dialogue or the negotiations of agreements (Article 11).

A general mandating procedure is in place, within the General Assembly. The General Assembly comprises delegates solely from the member associations. The voting rights of the member associations are proportional to their individual membership fee (Article 12). The General Assembly meets once a year (Article 13) and can make valid decisions only if more than half of the member associations and more than half of the votes are present or represented. In any vote, a

member association may be represented by another association to which it has given a written proxy. One member cannot hold more than three proxies. Decisions of the General Assembly require a majority of at least two-thirds of the votes cast, regardless of abstentions (Article 15).

When it comes to binding agreements with the unions in the graphical industry, Intergraf cannot make a decision alone. This has to be suggested and mandated by the organisation's Board and go through the General Assembly to be ratified by Intergraf members.

If mandated by the Board, Intergraf can negotiate with UNI Europa Graphical, as it has done in the past regarding co-signed letters and joint statements. Until now, the question of binding agreements to be negotiated at EU level with UNI Europa Graphical has not been part of social dialogue in the sector.

Based on this, one can conclude that Intergraf has a statutory mandating procedure, which can be used, in principle, to obtain a mandate to negotiate agreements.

As far as UNI Europa Graphical is concerned, it has three governing bodies: the UNI-EG Conference, the UNI-EG Biennial General Meeting, and the UNI-EG Steering Committee. The UNI-EG Conference is held every four years and the UNI-EG Biennial General Meeting every two years. The UNI-EG Steering Committee is elected every fourth year by the UNI-EG Conference and meets every quarter and when deemed necessary by its members. However, the statutes do not say anything about the power and capacity of the Steering Committee in order to achieve agreements on behalf of the UNI Europa Graphical members or of any mandating procedure.

It should, nevertheless, be noted that the statutes of UNI Europa, UNI-EG's mother federation, do explicitly refer to collective bargaining and negotiating agreements. The fact that one of the objectives of UNI-EG is to 'further the objectives as set out in the UNI-Europa Statutes within its own sphere of influence' seems to indicate that collective bargaining does also form part of UNI-EG's possible means of action.

Finally, attention should be drawn to the rules of procedures of the Sectoral Social Dialogue Committee for the Graphical Industry, agreed by UNI Europa Graphical and Intergraf. According to this document, the European Sectoral Social Dialogue for the Graphical Industry has the following objectives:

- to work together to better face the structural crisis and support the change the European graphical industry is undergoing with a view to enhancing its competitiveness;
- to prepare joint recommendations on agreed topics, to be addressed to the European Commission, other European institutions and/or the Member States, as appropriate;
- to encourage and develop all dimensions of the social dialogue in the sector at all levels.

Although the negotiation of agreements as per Article 155 TFEU is not explicitly mentioned among the goals of the European Social Dialogue Committee, one could consider that the last objective ('all dimensions of the social dialogue (...) at all levels') would not exclude this possibility.

Other European organisations

As final proof of the weight of UNI Europa Graphical and Intergraf, it is useful to look at the other European organisations to which the sector-related trade unions and employer organisations are affiliated.

The affiliations of the trade unions are listed in Table A2 in Annex 1. Several European organisations other than UNI Europa Graphical can be found. According to the bottom-up approach, there are five European organisations mentioned here, which cover at least three countries: the European Federation of Public Service Unions ([EPSU](#)), [IndustriAll Europe](#), the European Federation of Food, Agriculture and Tourism Trade Unions ([EFFAT](#)), the European

Federation of Building and Woodworkers (EFBWW), and the European Transport Federation (ETF). ETF, EFBWW and EFFAT are present in three countries, IndustriAll Europe in four countries and EPSU in five countries. It is worth noting that the bottom-up approach can be expected to underestimate the number of organisations affiliated to those European trade unions. According to the information provided on the websites of the various organisations, they are present in more countries than the bottom-up approach may suggest. The presence of these organisations reflects the overlapping domains of many trade unions, because these organisations do not claim to attract unions belonging to the graphical industry. Thus, no relevant competitor is identified on the employee side.

A similar review of the membership of the national employer/ business associations can be derived from Table A5 in Annex 1. In this case, only the Federation of European Screen Printing Associations (FESPA) appears to be relatively important, being present in six countries (Austria, Belgium, Denmark, Germany, the Netherlands and Portugal). However, it must be noted that this is only the outcome of the bottom-up approach. Indeed, FESPA is present in 20 Member States. The reason to exclude the other 14 organisations from the study is that they do not meet the criteria for inclusion; being either regularly involved in sector-related collective bargaining and/or being affiliated to Intergraf. Bearing this in mind, it can be concluded that the excluded national associations either primarily or exclusively act as trade associations. It is also worth noting that FESPA covers only screen printing activities (electrophotography and inkjet in [total printing](#)), which, according to Intergraf, account for around 3% to 4% of the entire graphical industry (Smithers Pira, 2015, p. 58). In this sense, the association appears to have a very specialised domain within the sector.

Summary

A pluralist national associational system prevails in many of the countries on both sides of the industry, but to a lesser extent on the employer side. Thus, 16 EU Member States record more than one trade union, while 12 Member States record more than one employer organisation. Some countries do not record national social partners. Bulgaria, Estonia and Slovakia do not record sectoral trade unions while there are no employer organisations in Croatia, Lithuania, Poland, Romania and Slovakia.

In some of the countries that do not record national social partners that meet the criteria to be included in this study, there is no sector-related collective bargaining in force (Bulgaria, Estonia, Lithuania and Romania). However, in Croatia, Poland and Slovakia, there are company collective agreements in force. In Croatia and Poland, trade unions conclude company collective agreements directly with the sectoral enterprises. In Slovakia, company collective agreements are concluded by some specific trade union organisations placed at the company level.

The domain demarcation of both trade unions and employer organisations shows that the sector, as it is defined in this study, does not cover the same reality in most of the Member States. This lack of congruence between the sector definition and the sectoral domain of the social partner organisations is higher among trade unions. Only six trade unions (around 11% of all the unions) show a membership domain that is more or less congruent with the sector definition compared with nine employer organisations (around 21% of all the employer organisations). The domain of the employer organisations tends to be narrower than the domain of the trade unions. Moreover, only in a relatively low number of countries, where multi-employer is the only bargaining level or the most important one, are multi-employer collective agreements more or less congruent with the sectoral definition used in this study (Austria, Belgium, France and Slovenia).

Although the situation differs widely among countries and organisations, statistics show that densities are lower for trade unions than for employer organisations. However, lack of figures for many organisations would suggest that these figures should be analysed with caution.

The sector's collective bargaining coverage (taking extension into account) widely differs by country. A group of nine countries record high collective bargaining coverage, exceeding 80%. A second group of countries records collective bargaining coverage rates of between 35% and 70%. A third group of four countries record collective bargaining coverage rates lower than 30%. In general, the predominance of single-employer bargaining and the lack of extension practices are features found in the countries that record the lowest collective bargaining coverage rates.

A high proportion of trade unions (75%) and employer organisations (82%) are consulted by the national governments. Moreover, the study shows that genuine sector-specific bodies have been established in 15 of the 28 countries under consideration.

Finally, top-down and bottom-up analyses reveal the following issues with regard to the two sectoral European-level social partner organisations analysed in this study.

UNI Europa Graphical has 29 direct affiliations from the countries under consideration (51% of all the trade unions identified) and 27 of them are involved in sectoral collective bargaining. The analysis of the trade unions not covered by UNI Europa Graphical reveals that there are 20 trade unions not covered in 13 countries that are involved in collective bargaining, from which 14 are also consulted by public authorities in sector-related issues. Accordingly, some relatively major national trade unions may not be covered.

Intergraf has 20 sectoral affiliations in 18 countries (43% of all the employer organisations identified) and 15 of them are involved in sectoral collective bargaining. As far as the 27 national organisations not covered by Intergraf are concerned, it is worth noting that 18 of them are party to collective bargaining. These 18 organisations are present in nine countries and all of them but one (ADEGI in Spain) are active in the whole country. From these 18 organisations involved in collective bargaining, 14 of them are also consulted by public authorities in sector-related issues.

Conclusions

Top-down and bottom-up approach analyses of the graphical industry in the EU28 show that UNI Europa Graphical and Intergraf are the most important European-level social partner organisations within the graphical industry, based on their membership. Analysis of the legal statutes of both organisations reveals that Intergraf has a general mandating procedure that can be used to obtain a mandate to negotiate agreements on behalf of its members as set out in Article 155 of the TFEU. UNI Europa Graphical does not have a statutory mandate to negotiate agreements on behalf of its members as set out in Article 155 of the TFEU, but its mother federation, UNI Europa does.

Pablo Sanz de Miguel, Notus

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Annex 1: Individual organisations

Trade unions

Table A1: Domain coverage and membership of trade unions in the graphical industry 2014

	Trade union	Domain coverage	Type of membership	Active members total	Active members in the sector
AT	GPA-djp	Overlap	Voluntary	n.a.	3,200
BE	ACV-CSC BIE	Sectionalism Overlap	Voluntary	285,000	5,000
BE	SETCa – BBTK	Sectionalism Overlap	Voluntary	400,000	300
BE	LBC-NVK	Sectionalism Overlap	Voluntary	215,000	2,500
CY	OVIEK-SEK	Sectionalism Overlap	Voluntary	7,400	n.a.
CY	SEVETTYK -PEO	Sectionalism Overlap	Voluntary	12,248	424
CZ	(OS TB	Sectionalism	Voluntary	542	542
DE	ver.di	Overlap	Voluntary	2,064,541	n.a.
DK	HK/Privat	Overlap	Voluntary	282,030	7,000
EL	OMTVX	Overlap	Voluntary	n.a.	n.a.
EL	Greek National Graphical Industry Workers'	Overlap	Voluntary	1,804	1,804

	Trade union	Domain coverage	Type of membership	Active members total	Active members in the sector
	Union				
ES	FSC-CCOO	Overlap	Voluntary	11,000	9,000
ES	FSP-UGT	Overlap	Voluntary	140,000	2,254
ES	ELA-STV	Sectionalism Overlap	Voluntary	29,163	n.a.
ES	LAB Sindikatuua	Sectionalism Overlap	Voluntary	n.a.	n.a.
FI	Pro-liitto	Sectionalism Overlap	Voluntary	110,000	2,968
FI	TEAM	Sectionalism Overlap	Voluntary	n.a.	8,958
FR	FILPAC- CGT	Overlap	Voluntary	n.a.	n.a.
FR	F3C CFTD	Overlap	Voluntary	39,200	1,900
FR	Livre FO	Sectionalism Overlap	Voluntary	n.a.	n.a.
FR	FASAP FO	Sectionalism Overlap	Voluntary	n.a.	n.a.
FR	SNIL CFE- CGC	Congruence	Voluntary	n.a.	n.a.
FR	SNP CFTC	Sectionalism Overlap	Voluntary	n.a.	n.a.
HR	Trade Union in Printing and Publishing Industry of Croatia	Congruence	Voluntary	4,000	4,000
HU	NYDSZ	Congruence	Voluntary	1,450	1,450
IE	Irish Print Group (part of SIPTU)	Sectionalism Overlap	Voluntary	199,881	2,000
IE	Unite	Sectionalism Overlap	Voluntary	23,851	n.a.
IT	SLC-CGIL	Overlap	Voluntary	10,000	4,000
IT	FISTEL - CISL	Overlap	Voluntary	51,181	n.a.

	Trade union	Domain coverage	Type of membership	Active members total	Active members in the sector
IT	Uilcom - Uil	Overlap	Voluntary	40,937	n.a.
IT	UGL Carta e Stampa	Overlap	Voluntary	n.a.	n.a.
LT	LKDPF	Overlap	Voluntary	700	n.a.
LU	OGBL Syndicat Imprimerie, Média et Culture - FLTL	Overlap	Voluntary	n.a.	n.a.
LU	LCGB Industrie	Overlap	Voluntary	n.a.	n.a.
LV	LKDAF	Overlap	Voluntary	n.a.	n.a.
LV	LPNA	Overlap	Voluntary	n.a.	50
MT	GWU	Overlap	Voluntary	46,831	672
MT	UHM	Overlap	Voluntary	26,103	500
NL	FNV KIEM	Overlap	Voluntary	35,000	8,000
NL	CNV	Overlap	Mixed	n.a.	1,900
NL	DE UNIE	Sectionalism Overlap	Voluntary	50,000	250
PL	ZZPPP [ZZP from 1st September 2014]	Overlap	Voluntary	600	600
PL	NSZZ 'Solidarnosc'	Overlap	Voluntary	800,000	n.a.
PT	FIEQUIMET AL	Overlap	Voluntary	n.a.	n.a.
PT	SINDETEL CO	Overlap	Voluntary	n.a.	n.a.
PT	SINDEQ	Overlap	Voluntary	n.a.	n.a.
PT	SIMA	Overlap	Voluntary	n.a.	n.a.
RO	USTR	Congruence	Mixed	1,695	1,695
SE	GS	Sectionalism Overlap	Voluntary	43,000	5,900
SE	Unionen	Sectionalism	Voluntary	465,000	2,330

	Trade union	Domain coverage	Type of membership	Active members total	Active members in the sector
		Overlap			
SE	Ledarna	Sectionalism Overlap	Voluntary	91,000	1,200
SE	SEKO	Sectionalism Overlap	Voluntary	122,955	200
SI	Pergam	Overlap	Voluntary	n.a.	900
SI	SGDS	Congruence	Voluntary	n.a.	n.a.
UK	Unite the Union (Unite)	Overlap	Voluntary	1,240,000	25,000

Notes: See Table A3 further below for a more detailed description of the trade unions' membership domain with regard to the sector. n.a. = not available. Annex 2 presents a full list of country codes.

Table A2: Density, collective bargaining, consultation and affiliations of trade unions in the graphical industry, 2014

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
				Yes	On an ad-hoc basis	
AT	GPA-djp	27	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	ÖGB (Austrian Trade Union Federation), IndustriAll European Trade Union, EPSU (European Public Services Union), EFFAT (European Federation of Food, Agriculture and Tourism Trade Unions), EFJ (European Federation of Journalists), UNI Europa, IndustriAll Global Union, UNI Global Union
BE	ACV-CSC BIE	30	Yes, both multi-employer and single bargaining	Yes	On an ad-hoc basis	ACV-CSC UNI Europa Graphical, EFBH, IndustriAll UNI Global; IndustriAll and BWI
BE	SETCa – BBTk	2	Yes, both multi-employer and single bargaining	Yes	On a regular basis	Uni Europa Graphical, Uni Global
BE	LBC-NVK	15	Yes, both multi-employer and single	Yes	n.a.	ACV-CSC Uni Europa, EPSU, Eurocadres, ETF, UNI Global; IndustriAll and ITF

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
			bargaining			
CY	OVIEK-SEK	n.a.	Yes, both multi-employer and single bargaining	n.a.	n.a.	Cyprus Workers' Confederation (SEK), EMF, ECF, ETUF/TCL, EGF, Uni Europa Graphical IMF, IUFECE, ITGL, IFG, ICEM
CY	SEVETTYK-PEO	38	Yes, both multi-employer and single bargaining	No	n.a.	Pancyprian Federation of Labour (PEO), Uni Europa Graphical -
CZ	Typografická beseda, odborový svaz zaměstnanců polygrafické výroby v Čechách, na Moravě a ve Slezsku (OS TB)	0	Yes, single-employer bargaining only	No	n.a.	None
DE	ver.di	n.a.	Yes, both multi-employer and single bargaining	No	n.a.	DGB, UNI Europa
DK	HK/Privat	97	Yes, both multi-employer and single bargaining	Yes	On a regular basis	Danish Confederation of Trade Unions (LO), UNI Europa, UNI Global Union
EL	OMTVX	n.a.	No	Yes	On an ad-hoc basis	Greek General Confederation of Labour (GSEE) None World Federation of Trade Unions
EL	Greek National Graphical Industry Workers' Union	2	No	Yes	On an ad-hoc basis	Greek General Confederation of Labour (GSEE), World Federation of Trade Unions
ES	FSC-CCOO	11	Yes, both multi-employer and single bargaining	No	n.a.	CCOO, UNI Europa Graphical, UNI Global
ES	FSP-UGT	3	Yes, both multi-employer and single bargaining	Yes	n.a.	UGT, UNI Europa Graphical, UNI Global
ES	ELA-STV	n.a.	Yes, both multi-employer	n.a.	n.a.	None

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
			and single bargaining			
ES	LAB Sindikatua	n.a.	Yes, multi-employer bargaining only	No	n.a.	None
FI	Pro-liitto	n.a.	Yes, multi-employer bargaining only	Yes	On a regular basis	Finnish Confederation of Salaried Employees (STTK)
FI	TEAM	n.a.	Yes, multi-employer bargaining only	Yes	On a regular basis	Central Organisation of Finnish Trade Unions (SAK), Uni Europa, Uni Global
FR	FILPAC-CGT	n.a.	Yes, both multi-employer and single bargaining	Yes	On an ad-hoc basis	General Confederation of Labour (CGT), UNI Europa Graphical
FR	F3C CFDT	n.a.	Yes, both multi-employer and single bargaining	Yes	On an ad-hoc basis	French Democratic Confederation of Labour (CFDT), UNI Europa Graphical, European Federation of Journalists (EFJ), UNI Global Union, International Federation of Journalists (IFJ)
FR	Livre FO	n.a.		Yes	On an ad-hoc basis	General Confederation of Labour – Force ouvrière (CGT-FO)
FR	FASAP FO	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	General Confederation of Labour – Force ouvrière (CGT-FO), EURO MEI, UNI MEI
FR	SNIL CFE-CGC	n.a.	Yes, both multi-employer and single bargaining	n.a.	n.a.	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff (CGE-CGC)
FR	SNP CFTC	n.a.	Yes, both multi-employer and single bargaining	Yes	On an ad-hoc basis	French Christian Workers' Confederation (CFTC)
HR	Trade Union in Printing and Publishing Industry	52	Yes, single-employer bargaining	Yes	On an ad-hoc basis	UNI Europa, UNI Global Union

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
	of Croatia		only			
HU	NYDSZ	19	Yes, single-employer bargaining only	Yes	On an ad-hoc basis	Magyar Szakszervezetek Országos Szövetsége (MSZOSZ), Magyar Szakszervezeti Szövetség (the newly established Hungarian Trade Union Confederation, as legal successor to MSZOSZ), UNI Europa Graphical, UNI Global
IE	Irish Print Group (part of SIPTU)	21	Yes, multi-employer bargaining only	n.a.	n.a.	None sector related
IE	Unite	n.a.		Yes	On an ad-hoc basis	None sector related
IT	SLC-CGIL	4	Yes, both multi-employer and single bargaining	Yes	n.a.	UNI Europa Graphical, European Trade Union Confederation (ETUC)
IT	FISTEL - CISL	n.a.	Yes, both multi-employer and single bargaining	Yes	n.a.	Confederazione Italiana Sindacati Lavoratori (CISL), UNI Europa Graphical, European Trade Union Confederation (ETUC), UNI Global Union
IT	Uilcom - Uil	n.a.	Yes, both multi-employer and single bargaining	Yes	On an ad-hoc basis	Unione Italiana del Lavoro (UIL), European Trade Union Confederation (ETUC), UNI Europa, Union Network International (UNI)
IT	UGL Carta e Stampa		Yes, both multi-employer and single bargaining	n.a.	n.a.	Unione Generale del Lavoro (UGL), UGL Federazione Nazionale Chimici
LT	LKDPF	n.a.	No	Yes	On an ad-hoc basis	Lithuanian Trade Union Confederation (LPSK), UNI Europa Graphical
LU	OGBL Syndicat Imprimerie, Média et Culture - FLTL	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Independent Trade Union Confederation of Luxembourg (Onofhängege Gewerkschaftsbond Lëtzebuerg, OGB-L), European Region of Media & Entertainment

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
						International (EURO-MEI), European Entertainment Alliance (EEA), UNI Europa Graphical, Union Global Union (UNI)
LU	LCGB Industrie	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	Luxembourg Confederation of Christian Unions (Lëtzebuerger Chrëschtliche Gewerkschafts-Bond, LCGB), IndustriAll - European Trade Union
LV	LKDAF	n.a.	No	Yes	On a regular basis	Free Trade Union Confederation of Latvia (LBAS), UNI Europa Graphical, International Federation of Actors (FIA), International Federation of Musicians (FIM), and Media & Entertainment International (UNI-MEI) via LKDAF
LV	LPNA	n.a.	No	Yes	On a regular basis	Free Trade Union Confederation of Latvia (LBAS), UNI Europa Graphical, International Federation of Actors (via LKDAF)
MT	GWU	44	Yes, single-employer bargaining only	Yes	On a regular basis	European Federation of Public Service Unions (EPSU), European Trade Union Confederation (ETUC), European Union Network (UNI Europa), European Workers' Education Association (EURO WEA), Federation of Europe Retired Personal Association (FERPA), Council of European Professional and Managerial Staff (Eurocadres), European Transport Federation (ETF), European Federation of Building and Wood Workers (EFBWW), European Metalworkers Federation (EMF), European Federation of Trade Unions in the Food, Agriculture and Tourism Sectors and Allied Branches (EFFAT). Public Services International (PSI), International Trade Union Confederation (ITUC),

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
						International Labour Organization (ILO), International Transport Workers' Federation (ITF), International Union of Food, Agriculture, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Association (IUF), International Federation of Building and Wood Workers (IFBWW), International Metalworkers' Federation (IMF), International Federation of Chemical, Energy, Mining and General Workers' Union (ICEM), International Textiles, Garment and Leather Workers' Federation (ITGLWF), Union Network International (UNI), International Federation of Musicians (IFM) and the International Federation of Workers' Education (IFWEA).
MT	UHM	33	Yes, single-employer bargaining only	Yes	On a regular basis	Confederation of Malta Trade Unions (CMTU), European Organisation of Public Service Employees (EUROFEDOP), International Organisation of Public Service Employees (INFEDOP). Being a member of the CMTU, the UHM is indirectly affiliated with the European Trade Union Confederation (ETUC), Commonwealth Trade Union Council (CTUC), the European Federation of Retired and Elderly Parents (FERPA), and the International Trade Union Confederation (ITUC).
NL	FNV KIEM	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	FNV Uni Europa Graphical
NL	CNV		Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	CNV WOW
NL	DE UNIE	n.a.	Yes, multi-employer	Yes	On an ad-hoc	MHP

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
			bargaining only		basis	
PL	ZZPPP [ZZP from 1st September 2014]	n.a.		No	n.a.	All-Poland Alliance of Trade Unions (OPZZ), UNI Europa Graphical, ETUC (as a member of the OPZZ), UniGlobal
PL	NSZZ ‘Solidarnosc’	n.a.	Yes, single-employer bargaining only	No	n.a.	None
PT	FIEQUIMETAL	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	General Confederation of Portuguese Workers (CGTP), IndustriALL
PT	SINDETELCO	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	UNI Europa Graphical, Union Network International (UNI)
PT	SINDEQ	n.a.	Yes, multi-employer bargaining only	na	n.a.	General Union of Workers (UGT)
PT	SIMA	n.a.	Yes, multi-employer bargaining only	No	n.a.	IndustriALL Europe, IndustriALL
RO	USTR	n.a.	Yes, both multi-employer and single bargaining	No	n.a.	Founding member of National Trade Union Bloc (BNS)
SE	GS	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Swedish Trade Union Confederation (LO), UNI EUROPA Graphical, European Federation of Building and Woodworkers (EFBWW), Building and Wood Workers International (BWI), UNI Global Union
SE	Unionen	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	Swedish Confederation for Professional Employees (TCO), UNI Europa Graphical, UNI Global Union
SE	Ledarna	n.a.	Yes, multi-employer bargaining	Yes	On an ad-hoc basis	CEC European Managers

	Trade union	Sectoral density (%)	Collective bargaining	Consultation		National, European and international affiliations
			only			
SE	SEKO	n.a.		n.a.	n.a.	LO, European Transport Federation (ETF), UNI Europa, EBTF, European Federation of Public Service Unions (EPSU), International Transport Federation (ITF), UNI Global, BWI, Public Service International (PSI)
SI	Pergam	22	Yes, multi-employer bargaining only	No	n.a.	UNI Europa Graphical, IndustriAll, UNI Global
SI	SGDS	n.a.		No	n.a.	KSS Pergam
UK	Unite the Union (Unite)	22	Yes, both multi-employer and single bargaining	Yes	On an ad-hoc basis	Trades Union Congress (TUC). UNI Europa, European Federation of Building and Woodworkers (EFBW), European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), European Federation of Public Service Unions (EPSU), European Transport Workers' Federation (ETF), IndustriAll European Trade Union. UNI Global Union, Building and Wood Workers' International (BWI), IndustriAll Global Union, International Transport Workers' Federation (ITF), International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers (IUF), Public Services International (PSI).

Note: n.a. = not available.

Table A3: Trade unions organisations, domain coverage and domain description in relation to graphical industry, 2014

	National association	Domain coverage	Domain description
AT	GPA-djp	Overlap	White-collar workers in all sectors of the private economy
BE	ACV-CSC BIE	Sectionalism Overlap	Blue-collar workers and technical white-collar workers in many sectors

	National association	Domain coverage	Domain description
			(packaging, paper production, paper recuperation, building sector, building materials, wood and furniture, chemical, energy, etc.)
BE	SETCa – BBTK	Sectionalism Overlap	White-collar workers in all sectors of the private economy
BE	LBC-NVK	Sectionalism Overlap	White-collar workers in industry, service, commerce, finance and healthcare
CY	OVIEK-SEK	Sectionalism Overlap	All workers in the private sector
CY	SEVETTYK-PEO	Sectionalism Overlap	All workers in the private sector
CZ	OS TB	Sectionalism	Graphical sector in some regions of the country
DE	ver.di	Overlap	Cross-sector domain
DK	HK/Privat	Overlap	All workers in administration on a broad scale including information technology jobs
EL	OMTVX	Overlap	All workers in graphical industry and paper industry
EL	Greek National Graphical Industry Workers' Union	Overlap	All workers in graphical industry and paper industry
ES	FSC-CCOO	Overlap	All workers in graphical industry, public administration, transport, tourism, telecommunications and information technology, postal services and courier companies, paper and photography, mass media, culture, leisure and shows
ES	FSP-UGT	Overlap	All workers in graphical industry, communication, banking and insurance activities, cleaning and private security
ES	ELA-STV	Sectionalism Overlap	All workers in industry and construction sector in the Basque Country
ES	LAB Sindikatua	Sectionalism Overlap	All workers in the Basque Country
FI	Pro-liitto	Sectionalism Overlap	White-collar workers in most of the private sectors
FI	TEAM	Sectionalism Overlap	All workers in 13 different industrial sectors, including basic chemicals, motor vehicle tyre sector, rubber industry, glass and ceramics industry, glazing, plastics and chemical

	National association	Domain coverage	Domain description
			products industry, textile industry and oil, gas and petrochemical products industry
FR	FILPAC-CGT	Overlap	All workers in graphical industry, publishing, press, paper industry, advertisement and press distribution
FR	F3C CFTD	Overlap	All workers in graphical industry, press, publishing, media, audiovisual, culture, sport, telecommunication, communication consultancy, advertisement, postal and distribution activities
FR	Livre FO	Sectionalism Overlap	All workers in graphical industry except printers belonging to a national daily newspaper and daily regional and departmental press (presse quotidienne régionale et départementale), distribution of press, reproduction
FR	FASAP FO	Sectionalism Overlap	All workers in printing of newspaper subsector and live performance sector, audiovisual, press and newspaper
FR	SNIL CFE-CGC	Congruence	All workers in graphical industry
FR	SNP CFTC	Sectionalism Overlap	All workers in graphical industry, press and audiovisual
HR	Trade Union in Printing and Publishing Industry of Croatia	Congruence	All workers in graphical industry
HU	NYDSZ	Congruence	All workers in graphical industry
IE	Irish Print Group (part of SIPTU)	Sectionalism Overlap	Blue-collar workers in all the sectors
IE	Unite	Sectionalism Overlap	Craft-workers across a variety of sectors
IT	SLC-CGIL	Overlap	All workers in all the sectors
IT	FISTEL - CISL	Overlap	All workers in all the sectors
IT	Uilcom - Uil	Overlap	All workers in all the sectors
IT	UGL Carta e Stampa	Overlap	All workers in all the sectors
LT	LKDPF	Overlap	All workers in graphical industry and live performance
LU	OGBL Syndicat Imprimerie, Média et Culture - FLTL	Overlap	All workers in graphical industry, media (TV, broadcast, radio, press) and advertisement

	National association	Domain coverage	Domain description
LU	LCGB Industrie	Overlap	All workers in graphical industry, steel and metal industries, textile and energy
LV	LKDAF	Overlap	All workers in graphical industry, culture, arts and entertainment sectors
LV	LPNA	Congruence	All workers in graphical industry
MT	GWU	Overlap	All workers in all sectors
MT	UHM	Overlap	All workers in all sectors
NL	FNV KIEM	Overlap	All workers in all sectors
NL	CNV	Overlap	All workers in all sectors
NL	DE UNIE	Sectionalism Overlap	Some workers in all sectors
PL	ZZPPP [ZZP from 1st September 2014]	Overlap	All workers in graphical and paper industry
PL	NSZZ 'Solidarnosc'	Overlap	All workers in all sectors
PT	FIEQUIMETAL	Overlap	All workers in most of industry sectors and energy
PT	SINDETELCO	Overlap	All workers in graphical, postal services, telecommunications, mass media and logistics
PT	SINDEQ	Overlap	All workers in graphical industry, energy, chemical, shoe and other industries and complementary activities
PT	SIMA	Overlap	All workers in manufacturing sector
RO	USTR	Congruence	All workers in graphical industry
SE	GS	Sectionalism Overlap	Blue-collar workers in graphical industry, forestry, woodworking and packaging
SE	Unionen	Sectionalism Overlap	All private sector white-collar workers
SE	Ledarna	Sectionalism Overlap	Managers in the graphical industry
SE	SEKO	Sectionalism Overlap	Blue-collar workers in printing of banknotes and other security papers, service and communication
SI	Pergam	Overlap	All workers in graphical industry and also some other sectors like pharmacy, construction, health sector, publishing and printing, traffic
SI	SGDS	Congruence	All workers in the graphical industry
UK	Unite the Union	Overlap	All workers in all sectors

	National association	Domain coverage	Domain description
	(Unite)		

Employer organisations

Table A4: Domain coverage and membership of employer/business organisations in the graphical industry, 2014

	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in the sector	Employees total	Employees in the sector
AT	VDMT	Congruence	Voluntary	217	217	5,625	5,625
AT	BI KHW	Sectionalism Overlap	Compulsory	4,566	110	3,303	
AT	PPV	Sectionalism Overlap	Compulsory	88	n.a.	9,177	n.a.
BE	FEBELGRA	Congruence	Voluntary	500	500	7,500	7,500
BE	ABEJ-BVDU	Congruence	Voluntary	n.a.	n.a.	n.a.	n.a.
BG	СПИБ/PIUB	Congruence	Voluntary	100	100	5,000	5,000
CY	Cyprus Newspapers and Magazines Publishers' Association	Sectionalism	Voluntary	5	5	n.a.	
CY	Pancyprian Master Printers Association	Sectionalism	Voluntary	10	10	n.a.	
CZ	SPP	Overlap	Voluntary	69	50	2,171	2,000
DE	bvdm	Sectionalism Overlap	Voluntary	n.a.	n.a.	n.a.	n.a.
DK	GA (now: GRAKOM)	Sectionalism Overlap	Voluntary	500	500	4,801	4,801
EE	ETTL	Overlap	Voluntary	n.a.	n.a.	n.a.	n.a.
EL	SEMEE	Sectionalism	Voluntary	120	120	n.a.	n.a.
EL	SEV	Sectionalism Overlap	Voluntary	n.a.	n.a.	n.a.	n.a.
EL	GSEVEE	Sectionalism Overlap	Voluntary	n.a.	n.a.	n.a.	n.a.
ES	FEIGRAF	Sectionalism	Voluntary	7,000	7,000	94,770	94,770
ES	ADEGI	Sectionalism Overlap	Voluntary	1,200	n.a.	48,000	n.a.
ES	Employer	n.a.	Voluntary	n.a.	n.a.	n.a.	n.a.

	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in the sector	Employees total	Employees in the sector
	Association of Graphical Arts of Bizcaia						
ES	AEDE	Sectionalism	Voluntary	28	28	7,624	7,624
FI	VKL	Overlap	Voluntary	380	150	n.a.	5,000
FR	UNIC	n.a.	Voluntary	1,350	1,100	53,500	45,000
FR	GMI	Sectionalism	Voluntary	450	450	n.a.	n.a.
FR	Fédération des Scop de la Communication	Sectionalism Overlap	Voluntary	256	42	2,000	1,000
HU	Nyomda- és Papíripari Szövetség	Overlap	Voluntary	65	32	10,000	8,000
IE	Irish Printing Federation (part of Ibec)	Overlap	Voluntary	7,500	n.a.	n.a.	n.a.
IT	FIEG	Sectionalism	Voluntary	130	130	n.a.	n.a.
IT	Assografici	Sectionalism Overlap	Voluntary	806	559	36,615	24,056
IT	Confartigianato Grafici	Sectionalism	Voluntary	6,000	6,000	15,000	15
IT	CNA Comunicazione e Terziario Avanzato	Sectionalism Overlap	Voluntary	10,737	n.a.	14,500	n.a.
IT	CASArtigiani	Sectionalism Overlap	Voluntary	n.a.	n.a.	n.a.	n.a.
IT	CLAAI	n.a.	Voluntary	n.a.	n.a.	n.a.	n.a.
IT	AIE	Sectionalism	Voluntary	n.a.	n.a.	n.a.	n.a.
IT	ANES	Sectionalism	Voluntary	n.a.	n.a.	n.a.	n.a.
LU	AMIL	Congruence	Voluntary	29	29	850	850
LV	LPUA	Overlap	Voluntary	48	n.a.	n.a.	n.a.
LV	Latvijas iepakojuma asociācija, LIA	Overlap	Voluntary	22	8	n.a.	n.a.
MT	MPIA	Congruence	Voluntary	30	30	1,150	1,150
NL	KVGO	Congruence	Voluntary	1,100	1,600	17,000	20,000
NL	ZSO	Congruence	Voluntary	80	80	n.a.	n.a.

	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in the sector	Employees total	Employees in the sector
PT	APIGRAF	Congruence	Voluntary	503	503	10,175	10,175
SE	GFF	Sectionalism Overlap	Voluntary	470	385	13,900	8,850
SE	Almega	Sectionalism Overlap	Voluntary	650	192	45,000	3,000
SI	MZ-GZS	Overlap	Voluntary	117	60	1,000	500
SI	ZDS	Overlap	Voluntary	n.a.	n.a.	n.a.	n.a.
UK	BPIF	Overlap	Voluntary	1,386	1,270	66,000	n.a.
UK	GES	Sectionalism	Voluntary	28	28	n.a.	n.a.

Notes: See Table A6 for a more detailed description of the employer organisations' membership domain with regard to the sector. n.a. = not available.

Table A5: Density, collective bargaining, consultation and affiliations of employer organisations in the graphical industry, 2013

	Employer organisation	Sectoral density (%) Companies	Sectoral density (%) Employees	Collective bargaining	Consultation		National, European and international affiliations
					Yes	On a regular basis	
AT	VDMT	24.74	47.26	Yes, multi-employer bargaining only	Yes	On a regular basis	European Federation for Print and Digital Communication (Intergraf), FESPA (Federation of European Screen Printing Associations)
AT	BI KHW	12.54	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Austrian Federal Economic Chamber (WKO)
AT	PPV	n.a.	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	Austrian Federal Economic Chamber (WKO), Intergraf
BE	FEBELGRA	57.01	63.01	Yes, both multi-employer and single bargaining	Yes	On a regular basis	VBO-FEB, VOKA, BECI Intergraf, FESPA
BE	ABEJ-BVDU	n.a.	n.a.	Yes, both multi-employer and single bargaining	Yes	On an ad-hoc basis	No information.
BG	СПИБ/PIUB	9.06	n.a.	No	Yes	On an ad-hoc basis	Confederation of Employers and Industrialists in Bulgaria, Intergraf, Balkan Print Forum
CY	Cyprus	1.77	n.a.	Yes, multi-	No	n.a.	Cyprus Employers and

	Newspapers and Magazines Publishers' Association			employer bargaining only			Industrialists Federation (OEB)
CY	Pancyprian Master Printers Association	3.53	n.a.	Yes, multi-employer bargaining only	No	n.a.	Cyprus Employers and Industrialists Federation (OEB)
CZ	SPP	0.62	n.a.	Yes, single-employer bargaining only	No	On an ad-hoc basis	Unie zaměstnavatelských svazů ČR (Union of Employers' Associations of the Czech Republic)
DE	bvdm	n.a.	n.a.	Yes, both multi-employer and single bargaining	Yes	On an ad-hoc basis	German Confederation of Employers' Associations (BDA), German Association of Skilled Crafts Confederations (UDH), Federal Association of German Advertising Industry (ZAW), Intergraf, FESPA
DK	GA	59.38	66.23	Yes, multi-employer bargaining only	Yes	On a regular basis	Confederation of Danish Employers (DA), Intergraf, FESPA
EE	ETTL	n.a.	n.a.	No	Yes	n.a.	Intergraf
EL	SEMEE	1.50	n.a.	No	No	n.a.	SEV, Formerly in Intergraf
EL	SEV	n.a.	n.a.	No	Yes	n.a.	SEV, BUSINESSEUROPE
EL	GSEVEE	n.a.	n.a.	No	n.a.	n.a.	GSEVEE, UEAPME
ES	FEIGRAF	51.74	118.6	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Spanish Confederation of Employers' Organisations (CEOE), Intergraf
ES	ADEGI	n.a.	n.a.	Yes, multi-employer bargaining only	No	n.a.	None
ES	Employer Association of Graphical Arts of Bizcaia	n.a.	n.a.	n.a.	n.a.	n.a.	CEBEK
ES	AEDE	0.21	9.542	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	European Newspaper Publishers' Association (ENPA), World Association of Newspapers and News Publishers (WAN-IFRA)
FI	VKL	15.74	n.a.	Yes, multi-	Yes	On a	Confederation of Finnish

				employer bargaining only		regular basis	Industries (EK Intergraf (through member organisation Graafinenteollisuusry))
FR	UNIC	24.31	n.a.		Yes	On an ad-hoc basis	Movement of French Entreprises (MEDEF), Confederation of Small and Medium-sized Entreprises (CGPME), representing small and medium-sized enterprises (SMEs); Craftwork Employers' Association (UPA), representing self-employed craft workers; Intergraf.
FR	GMI	9.94	n.a.		Yes	On an ad-hoc basis	CGPME, Confédération Générale des Petites et Moyennes Entreprises / Confederation of Small and Medium-size Entreprises None None
FR	Fédération des Scop de la Communication	0.93	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Confédération Générale des Scop (CG Scop)
HU	Nyomda- és Papíripari Szövetség	0.95	105.2	No	Yes	On an ad-hoc basis	Disaffiliated from MGYOSZ (Business Hungary) in 2006, Intergraf, CEPI (paper industry)
IE	Irish Printing Federation (part of Ibec)	n.a.	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	None sector-related
IT	FIEG	0.80	n.a.	Yes, multi-employer bargaining only	Yes	On a regular basis	European Magazine Media Association (EMMA), European Newspaper Publishers Association (ENPA), World Association of Newspapers and News Publishers (WAN-IFRA), International Federation of the Periodical Press (FIPP)
IT	Assografici	3.44	25.76	Yes, both multi-employer and single bargaining	Yes	On a regular basis	Federazione della Filiera della Carta e della Grafica, Confindustria, Intergraf
IT	Confartigianato Grafici	36.91	0.016	Yes, multi-employer	Yes	On an ad-hoc	Confartigianato Imprese, European Association of

				bargaining only		basis	Craft, Small and Medium-sized Enterprises (UEAPME)
IT	CNA Comunicazione e Terziario Avanzato	n.a.	n.a.	Yes, multi-employer bargaining only	Yes	On a regular basis	CNA Nazionale, European Association of Craft, Small and Medium-sized Enterprises (UEAPME), Federation of European Publishers (FEP)
IT	CASArtigiani	n.a.	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	
IT	CLAAI	n.a.	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	
IT	AIE	n.a.	n.a.		Yes	On a regular basis	Confindustria, Federation of European Publishers (FEP), International Publishers Association (IPA)
IT	ANES	n.a.	n.a.		Yes	On a regular basis	Confindustria, International Federation of the Periodical Press (FIPP)
LU	AMIL	31.18	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Federation of Craft Workers (Fédération des Artisans), Intergraf
LV	LPUA	n.a.	n.a.	Yes, multi-employer bargaining only	Yes	On a regular basis	Latvian Employers' Confederation (LDDK), Intergraf
LV	Latvijas iepakojuma asociācija, LIA	2.06	n.a.		Yes	On a regular basis	Latvian Employers' Confederation (LDDK), World Packaging Association (WPO)
M T	MPIA	22.22	75.16	No	Yes	On an ad-hoc basis	Intergraf
NL	KVGO	11.05	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	VNO-NCW, Intergraf
NL	ZSO	2.21	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	VNO-NCW, ZSO (FESPA professional organisation)
PT	APIGRAF	17.75	65.1	Yes, multi-employer bargaining only	Yes	On a regular basis	CIP, RECIPAC, Print Power Portugal, Associação Museu de Imprensa CITPA, Intergraf, FESPA,

							CLIMATE, CALC
SE	GFF	31.17	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Confederation of Swedish Enterprise, Intergraf
SE	Almega	15.55	n.a.	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Confederation of Swedish Enterprise
SI	MZ-GZS	4.86	n.a.	Yes, multi-employer bargaining only	No	n.a.	Chamber of Commerce and Industry of Slovenia (GZS)
SI	ZDS	n.a.	n.a.	Yes, multi-employer bargaining only	No	n.a.	BUSINESSEUROPE, International Organisation of Employers (IOE), International Labour Organization (ILO)
UK	BPIF	10.48	n.a.	No	Yes	On an ad-hoc basis	CBI, Trade Association Forum, Intergraf, European Carton Makers Association (ECMA), International Federation of Manufacturers and Converters of Self-adhesive and Heat-seal Materials on Paper and other Substrate (FINAT), World Print Federation
UK	GES	0.23	n.a.	Yes, multi-employer bargaining only	n.a.	n.a.	CBI Scotland, Intergraf

Note: n.a. = not available.

Table A6: Employer organisations, domain coverage and domain description in relation to graphical industry, 2013

	National association	Domain coverage	Domain description
AT	VDMT	Congruence	All companies in the graphical industry
AT	BI KHW	Sectionalism Overlap	Artisan bookbinding activities and small cases manufacturers
AT	PPV	Sectionalism Overlap	All companies in graphical industry except printing activities and pre-press or pre-media activities and paper and cardboard production and processing industry
BE	FEBELGRA	Congruence	All companies in graphical industry
BE	ABEJ-BVDU	Congruence	All companies in graphical industry
BG	СПИБ/PIUB	Congruence	All companies in graphical industry

CY	Cyprus Newspapers and Magazines Publishers' Association	Sectionalism	All companies in printing of newspapers (magazines inclusive) subsector
CY	Pancyprian Master Printers Association	Sectionalism	All companies in graphical industry except the printing of newspapers
CZ	SPP	Overlap	All companies in the graphical industry and suppliers of manufacturing technology, consumables (paper, inks, colours, printing plates etc.), vocational high schools
DE	bvdm	Sectionalism Overlap	Private, national and multi-national companies in the graphical industry and flexographic, engraving, further processing or media companies mainly producing text, audio- and picture formats for digital media.
DK	GA	Sectionalism Overlap	All private companies in graphical industry and the packaging sector
EE	ETTL	Overlap	All companies in the graphical industry and suppliers of printing equipment and vocational education
EL	SEMEE	Sectionalism	Private companies in the graphical industry
EL	SEV	Sectionalism Overlap	Large enterprises of private ownership in graphical industry and others
EL	GSEVEE	Sectionalism Overlap	Small size companies in all sectors
ES	FEIGRAF	Sectionalism	All companies in the graphical industry except printing of newspapers
ES	ADEGI	Sectionalism Overlap	All companies in all sectors in the province of Gipuzkoa (Basque Country)
ES	Employer Association of Graphical Arts of Bizcaia	n.a.	n.a.
ES	AEDE	Sectionalism	All companies in printing of newspapers subsector
FI	VKL	Overlap	Mostly private companies in the graphical industry and the entire media sector, including press, publishing and newspaper delivery
FR	UNIC	n.a.	n.a.
FR	GMI	Sectionalism	All companies in other printing activities subsector
FR	Fédération des Scop	Sectionalism Overlap	Workers cooperative societies in

	de la Communication		graphical industry, information and communication (publishing, film industry), live performance and art, advertising and consultancy in communication
HU	Nyomda- és Papíripari Szövetség	Overlap	Information not provided
IE	Irish Printing Federation (part of Ibec)	Overlap	Information not provided
IT	FIEG	Sectionalism	Private companies in the graphical industry
IT	Assografici	Sectionalism Overlap	Small size companies in graphical industry except printing of newspapers and paper industry
IT	Confartigianato Grafici	Sectionalism	Small size companies in the graphical industry
IT	CNA Comunicazione e Terziario Avanzato	Sectionalism Overlap	SMEs in graphical industry and high-tech enterprises' sector, call centres' sector and photography sector
IT	CASArtigiani	Sectionalism Overlap	SMEs in graphical industry, typographer, photographer as well as pulp and paper industry
IT	CLAAI	n.a.	n.a.
IT	AIE	Sectionalism	SMEs and Craftsmen in graphical sector except newspapers publishing
IT	ANES	Sectionalism	All companies in the graphical industry except except newspaper publishing
LU	AMIL	Congruence	All companies in the graphical industry
LV	LPUA	Overlap	All companies in the graphical industry, printing houses, graphic art suppliers, paper merchants and graphic art school.
LV	LIA	Overlap	All companies in the graphical industry, packaging producers, merchants), package treatment company Latvijas Zaļais punkts, education institutions.
MT	MPIA	Congruence	All companies in the graphical industry
NL	KVGO	Congruence	All companies in the graphical industry
NL	ZSO	Congruence	All companies in the graphical industry
PT	APIGRAF	Congruence	All companies in the graphical industry
SE	GFF	Sectionalism Overlap	All companies in the graphical industry except printing of newspapers and

			packaging activities
SE	Almega	Sectionalism Overlap	All companies in the graphical industry except book printing and the entire media sector
SI	MZ-GZS	Overlap	All companies in the graphical industry and publishing, bookselling and broadcast media
SI	ZDS	Overlap	All companies in all sectors
UK	BPIF	Overlap	All companies in the graphical industry and suppliers to the graphical industries.
UK	GES	Sectionalism	All companies in the graphical industry in Scotland

Organisation names and abbreviations

Table A7: Abbreviated trade union organisation names

	Abbreviation	Full association name
AT	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
BE	ACV-CSC BIE	Confederation of Christian Trade Unions, Building, industry & energy
BE	SETCa – BBTK	Union of White-Collar Staff, Technicians and Managers
BE	LBC-NVK	National Union of Employees
CY	OVIEK-SEK	Cyprus Industrial Workers' Federation
CY	SEVETTYK-PEO	Cyprus Union of Workers - Industry, Trade, Press and Printing and General Services
CZ	Typografická beseda, odborový svaz zaměstnanců polygrafické výroby v Čechách, na Moravě a ve Slezsku (OS TB)	Typographical association, trade union of employees of printing production in Bohemia, Moravia and Silesia (not used)
DE	ver.di	United Services Union
DK	HK/Privat	HK/Private
EL	OMTVX	Press and Paper Industry Salaried Workers' Federation
EL	Greek National Graphical Industry Workers' Union	Greek National Union of Lithographers, Graphic Arts and Press Salaried Workers and Similar Professionals
ES	FSC-CCOO	Federation of Citizen Services of the Trade Union Confederation of Workers' Commissions
ES	FSP-UGT	Services Federation of General Workers' Confederation

ES	ELA-STV	Basque Workers' Solidarity
ES	LAB Sindikatua	Abertzales Workers Commission
FI	Pro-liitto	Trade union Pro
FI	TEAM	Industrial Union TEAM
FR	FILPAC-CGT	Workers' Federation of the Publishing, Paper and Communication Industries – General Confederation of Labour
FR	F3C CFDT	Federation Communication Consultancy Culture - French Democratic Confederation of Labour
FR	Livre FO	Book industry federation FO
FR	FASAP FO	Art, Live Performance, Audio-visual and Press Federation - Force ouvrière
FR	SNIL CFE-CGC	Manager nation union of the printing industry and related activities
FR	SNP CFTC	Press National Unions CFTC
HR	Trade Union in Printing and Publishing Industry of Croatia	Trade Union in Printing and Publishing Industry of Croatia
HU	NYDSZ	Hungarian Printing Workers' Union
IE	Irish Print Group (part of SIPTU)	Irish Print Group (part of SIPTU)
IE	Unite	Unite the union
IT	SLC-CGIL	Communication Workers Union
IT	FISTEL - CISL	Information, Entertainment and Telecommunication Workers' Union
IT	Uilcom - Uil	Italian Communication Workers' Union
IT	UGL Carta e Stampa	The General Union of Work – Paper and Press Sector
LT	LKDPF	Lithuanian Trade Union Federation of Cultural Workers
LU	OGBL Syndicat Imprimerie, Média et Culture - FLTL	OGBL Printing, Media and Culture Union - FLTL
LU	LCGB Industrie	Luxembourg Confederation of Christian Unions - Industry
LV	LKDAF	Latvian Trade Union Federation for People Engaged in Cultural Activities
LV	LPNA	Latvian Graphical Industry Trade Union
MT	GWU	General Workers' Union
MT	UHM	Union of United Workers
NL	FNV KIEM	FNV KIEM
NL	CNV	CNV Christian Services Union
NL	DE UNIE	The Union

PL	ZZPPP [ZZP from 1st September 2014]	Trade Union of Employees of the Printing Industry
PL	NSZZ ‘Solidarnosc’	Independent Self-governing Trade Union ‘Solidarnosc’
PT	FIEQUIMETAL	Federation of Metalworking, Chemical, Pharmaceutical, Electrical, Energy and Mining Unions
PT	SINDETELCO	Democratic Trade Union of Communication and Media Workers
PT	SINDEQ	Trade Union of Energy, Chemical, Textile and Other Industries
PT	SIMA	Trade Union of Metalworkers and Allied Industries
RO	USTR	Romania’s Printers Trade Union
SE	GS	Swedish Union of Forestry, Wood and Graphical Workers
SE	Unionen	Unionen
SE	Ledarna	Ledarna
SE	SEKO	Swedish Union for Service and Communications Employees
SI	Pergam	Confederation of Trade Unions of Slovenia Pergam
SI	SGDS	Trade Union of Graphic Activities of Slovenia
UK	Unite the Union (Unite)	Unite the Union (Unite)

Table A8: Abbreviated employer organisation names

	Abbreviation	Full association name
AT	VDMT	Association of Printing and Media Technology Enterprises
AT	BI KHW	Federal Guild of Artisan Bookbinders and Cardboard Boxes and Small Cases Manufacturers
AT	PPV	Association of the Paper-processing Industry in Austria
BE	FEBELGRA	Belgian Federation of Graphical Industries
BE	ABEJ-BVDU	Belgian Association of Newspaper Editors
BG	СПИБ/PIUB	Bulgaria Printing Industry Union
CY	Cyprus Newspapers and Magazines Publishers’ Association	Cyprus Newspapers and Magazines Publishers’ Association
CY	Pancyprian Master Printers Association	Pancyprian Master Printers Association
CZ	SPP	Union of Printing Industry, Businessmen and Entrepreneurs
DE	bvdm	German Printing and Media Industries Federation
DK	GA (now: GRAKOM)	Graphic Association
EE	ETTL	Association of Estonian Printing Industry

EL	SEMEE	Hellenic Federation of Printing Media Communication
EL	SEV	Enterprises and Industries Association
EL	GSEVEE	General Confederation of Professional Craftsmen and Merchants of Greece
ES	FEIGRAF	Employer Federation of Graphical Industry of Spain
ES	ADEGI	Business Association of Gipuzkoa
ES	Employer Association of Graphical Arts of Bizcaia	Employer Association of Graphical Arts of Bizcaia
ES	AEDE	Spanish Newspaper Publishers' Association
FI	VKL	Federation of the Finnish Media Industry, Finnmedia
FR	UNIC	National Union of Printing and Communication
FR	GMI	Groupement des métiers de l'imprimerie
FR	Fédération des Scop de la Communication	Federation of Workers Cooperative Societies of Communication
HU	Nyomda- és Papíripari Szövetség	Federation of Hungarian Printers and Papermakers
IE	Irish Printing Federation (part of Ibec)	Irish Business Employers Confederation
IT	FIEG	Italian Federation of Newspapers and Magazines Publishers
IT	Assografici	Italian Printing and Paper Converting Industries Association
IT	Confartigianato Grafici	Confartigianato Graphical Industries
IT	CNA Comunicazione e Terziario Avanzato	CNA Communication and High-Tech Services Sector
IT	CASArtigiani	Autonomous Confederation of Artisan Unions
IT	CLAAI	Confederation of Free Italian Artisan Associations
IT	AIE	Italian Publishers Association
IT	ANES	National Association of Technical, Professional and Specialised Publishing Companies
LU	AMIL	Association of Master Printers of the Grand Duchy of Luxembourg
LV	LPUA	Latvian Printers' Association
LV	LIA	Latvian Packaging Enterprises Association
MT	MPIA	Malta Printing Industry Association

NL	KVGO	Royal Dutch Association of Printing and Allied Industries
NL	ZSO	Association of Screenprint and Sign Companies
PT	APIGRAF	Portuguese Printing, Visual Communication and Paper Converting Industries Association
SE	GFF	Swedish Graphic Companies' Federation
SE	Almega	Almega - Media Industries Employers Association
SI	MZ-GZS	Chamber of Media Providers
SI	ZDS	Association of Employers of Slovenia
UK	BPIF	British Printing Industries Federation
UK	GES	Graphic Enterprise Scotland

Annex 2: Country codes

Code	Country
AT	Austria
BE	Belgium
BG	Bulgaria
CY	Cyprus
CZ	Czech Republic
DE	Germany
DK	Denmark
EE	Estonia
EL	Greece
ES	Spain
FI	Finland
FR	France
HR	Croatia
HU	Hungary
IE	Ireland
IT	Italy
LT	Lithuania
LU	Luxembourg

LV	Latvia
MT	Malta
NL	Netherlands
PL	Poland
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
SK	Slovakia
UK	United Kingdom

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