

UNIVERSITE CATHOLIQUE DE LOUVAIN
Institut des Sciences du Travail



SUMMARY

**STUDY ON THE REPRESENTATIVENESS OF THE SOCIAL PARTNER
ORGANISATIONS IN THE CHEMICAL INDUSTRY**

EU25 and Bulgaria, Romania and Turkey

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INTRODUCTION

PRESENTATION OF THE STUDY

This report has been produced as part of the research into the institutional representativeness of social partners in the European Union, and the situation of trade unions and employers' associations in the candidate countries. The research has been conducted by the Institut des Sciences du Travail (Université catholique de Louvain) at the request of the Employment and Social Affairs Directorate-General of the European Commission (Call for tenders No VT/2002/83).

The issue of the representativeness of European organisations came to the fore in the context of the promotion of social dialogue. In a communication published in 1993¹, the European Commission set out three criteria determining the access that employers' and workers' organisations had to the consultation process under Article 3 of the Agreement on Social Policy. According to the terms of this communication, the organisation must: (1) *be cross-industry or relate to specific sectors or categories and be organised at European level; (2) consist of organisations which are themselves part of the social partners structures of Member States which have the capacity to negotiate agreements, and which are representative of all Member States, as far as possible; (3) have adequate resources to ensure their effective participation in the consultation process.* In 1996, it adopted a consultation document² that sought to bring together the widest range of views on the measures to be employed in fostering and strengthening European social dialogue. At that point, given that the social partners at European level were, and still are, in the process of structuring themselves and accepting new applications for membership, the European Commission conducted a study on the representativeness of inter-professional and sector organisations in the European Union, and in a new communication³ in 1998, announced the measures that it proposed to take in order to adapt and promote social dialogue at European Union level. In it, the Commission reaffirmed the three criteria established by the 1993 Communication, permitting European organisations to be recognised as representative for consultation purposes under Article 3 of the Social Policy Agreement. Finally, in 2002, the Commission reaffirmed its support for a strengthening of social dialogue in its communication *The European social dialogue, a force for innovation and change*⁴. In the respect of the three criteria set up by the Commission, as has been pointed out in previous studies⁵, *the changes focus on the disappearance of demands relating to the inter-sector nature of organisations and on the fact that they are established in all Member States; the new rules have not been formulated in a very restrictive manner, they only require employers' and workers' organisations to represent "several" Member States. This relaxation of the implementation condition might pose a demarcation problem in the sense that there is no criterion setting out a minimum number of Member States to activate it.*

Against this background, it is clear that one of the main issues, both for the Commission and for the European social partners, is the enlargement of the European Union and its impact on the process of social dialogue at Community level: *The Communication underlines the vital role and the weaknesses of social dialogue in the candidate countries. Much has been achieved over the past decade with the support of Community programmes and initiatives. However, a lot remains to be done to strengthen the capacities of social partners and involve them in the accession process*⁶. As far as the European Commission is concerned, it is *only with sufficiently robust national structures that the social partners will be able to participate effectively in negotiations and in other European social dialogue activities and also implement agreements at national level*⁷.

The development of social dialogue, therefore, formed part of the "*acquis communautaire*" (community achievement): *The Treaty requires that social dialogue be promoted and gives additional powers to the social partners. The candidate countries are, therefore, invited to confirm that social dialogue is accorded the importance required and that the social partners are sufficiently developed in order to discharge their responsibilities at European Union and national level, and to indicate whether they are consulted on legislative drafts relating to the taking over of the employment and social policy acquis... Therefore, the development not only of tripartite structures but also of autonomous, representative*

¹ COM(93) 600 final of 14 December 1993, Communication from the Commission concerning *the application of the Protocol on Social Policy.*

² COM(96) 448 final of 18 September 1996 concerning *the development of the social dialogue at Community level.*

³ COM(98) 322 final of 20 May 1998, Communication from the Commission, *Adapting and promoting the Social Dialogue at Community level.*

⁴ COM(2002) 341 final of 26 June 2002, Communication from the Commission, *The European social dialogue, a force for innovation and change.*

⁵ Spineux A., Walthery P. et al., *Report on the representativeness of European social partners organisations*, Report coordinated by the Institut des Sciences du Travail of the Université catholique de Louvain, for the European Commission, Directorate General for Employment, Industrial Relations and Social Affairs, Louvain-la-Neuve, 1998.

⁶ *Op cit.*

⁷ *Op cit.*

bipartite social dialogue is an important aspect for the future involvement of the candidate countries' social partners in the social dialogue activities developed at European and national level⁸.

Enlargement of the European Union is a major issue from a quantitative and qualitative point of view: *The quantitative leap is quite clear as soon as the number of partners rises. The delegations taking part in social dialogue will be enlarged, and that, as we know, does not facilitate dialogue. However, the leap is also qualitative in that the new entrants present the industrial relations systems they have inherited from their national histories⁹.* By and large, most of the countries studied are notable for strongly developed tripartism, but for weakness at central bipartite level, in social dialogue at sector level, and at the level of organisations, particularly employers' associations.

The aim of the report is to produce a study that sets out both brief descriptions of the way that social dialogue functions in the countries concerned, and descriptions of the various workers' and employers' organisations involved in social dialogue at sector level. This study may be seen as a tool to help understand these quantitative and qualitative factors.

RESEARCH APPROACH AND COMMENTS ON METHODOLOGY

For the purposes of this study, a network of University researchers throughout the 15 European Union Member States and candidate countries was set up. These researchers are experts in industrial relations and are independent of both the European Commission and employers' and workers' organisations. Each researcher was charged with drawing up a report based on a common template. A questionnaire tailored to the specific realities of the chemical industry sector was elaborated to that effect. Each national report issued by the expert was submitted to the national organisations in order to enable them to make comments on collected data. The IST took charge of coordinating the study and drawing up the summaries. Constant communication and ongoing collaboration between the IST, national experts and national organisations takes place in order to associate the various players of the process of research. The report is also checked by the European organisations and their members in order to enable them to make comments on the report. This phase of consultation represents an important stage of research. Lastly, the report is checked by the European Commission's services. The IST wishes to stress its independence with regard to the political consequences and decisions which may be made on the basis of this study.

The research process, in its design, comprises a phase of collection of data on the players and the social dialogue in which they participate, but also an active approach embracing the building of a consensus, which is an integral part of the process of social dialogue itself. Thus, whereas in a good number of cases the data collected do not permit total definition of the role played by the organisations, the contacts made during the data collection and the discussions with the different players concerned should be an integral part of a process of mutual recognition¹⁰. The main sources used within the framework of this study are thus the social partners themselves.

Lastly, a few words on the consultation process involving the European social partners must be added. The organisations which have been consulted are cited in annex. The comments that the IST received from these organisations, and those of their members have been incorporated in different ways, depending on the kind of information received:

- The observation is directly included in the content of the report
- When a difference of opinion exists between the employers' or workers' organisation and the expert, the observation is included as a footnote in the report, as well as the justification of the expert.

The consultation for this report on the chemical industry took place during the months of October-November 2005.

Finally, given that national situations are very changeable and evolve rapidly, it is important to stress that the aim of this study is to take "a snapshot" of the situation of the organisations in 2005. Interviews with the organisations took place, and the national reports were written, between January and February 2005.

⁸ *Enlargement of the European Union. Guide to the negotiations. Chapter by chapter*, European Commission, DG Enlargement, June 2003.

⁹ Léonard E., Spineux A., *Les relations industrielles en Europe aujourd'hui*, Institut des Sciences du Travail, UCL, 2003 (unpublished).

¹⁰ Reply to Call for Tenders VT/2002/83. Studies on the representativeness of the social partners at sector level in the European Union and monographs on the situation of the social partners in the candidate countries, Institut des Sciences du Travail, UCL, 2002.

NACE NOMENCLATURE¹¹

Once again and according to the national traditions, the sector delimitation can differ from a country to another, and the particularities of each country are actually a very important point of the research. Indeed, the structuring of the employers' organisations and trade unions as well as the organization of the social dialogue can cover sub-sectors or different trades/professions. The following NACE nomenclature is thus presented as an indication.

23 MANUFACTURE OF COKE, REFINED PETROLEUM PRODUCTS AND NUCLEAR FUEL

23.1 Manufacture of coke oven products

23.10 Manufacture of coke oven products

23.2 Manufacture of refined petroleum products

23.20 Manufacture of refined petroleum products

23.3 Processing of nuclear fuel

23.30 Processing of nuclear fuel

24 MANUFACTURE OF CHEMICALS AND CHEMICAL PRODUCTS

24.1 Manufacture of basic chemicals

24.11 Manufacture of industrial gases

24.12 Manufacture of dyes and pigments

24.13 Manufacture of other inorganic basic chemicals

24.14 Manufacture of other organic basic chemicals

24.15 Manufacture of fertilizers and nitrogen compounds

24.16 Manufacture of plastics in primary forms

24.17 Manufacture of synthetic rubber in primary forms

24.2 Manufacture of pesticides and other agro-chemical products

24.20 Manufacture of pesticides and other agro-chemical products

24.3 Manufacture of paints, varnishes and similar coatings, printing ink and mastics

24.30 Manufacture of paints, varnishes and similar coatings, printing ink and mastics

24.4 Manufacture of pharmaceuticals, medicinal chemicals and botanical products

24.41 Manufacture of basic pharmaceutical products

24.42 Manufacture of pharmaceutical preparations

24.5 Manufacture of soap and detergents, cleaning and polishing preparations, perfumes and toilet preparations

24.51 Manufacture of soap and detergents, cleaning and polishing preparations

24.52 Manufacture of perfumes and toilet preparations

24.6 Manufacture of other chemical products

24.61 Manufacture of explosives

24.62 Manufacture of glues and gelatines

24.63 Manufacture of essential oils

24.64 Manufacture of photographic chemical material

24.65 Manufacture of prepared unrecorded media

24.66 Manufacture of other chemical products n.e.c.

24.7 Manufacture of man-made fibres

24.70 Manufacture of man-made fibres

¹¹ Source: COMMISSION REGULATION (EC) No 29/2002 of 19 December 2001, amending Council Regulation (EEC) No 3037/90 on the statistical classification of economic activities in the European Community, In: Official Journal of the European Communities (10.01.2002).

25 MANUFACTURE OF RUBBER AND PLASTIC PRODUCTS

25.1 **Manufacture of rubber products**

- 25.11 Manufacture of rubber tyres and tubes
- 25.12 Retreading and rebuilding of rubber tyres
- 25.13 Manufacture of other rubber products

25.2 **Manufacture of plastic products**

- 25.21 Manufacture of plastic plates, sheets, tubes and profiles
- 25.22 Manufacture of plastic packing goods
- 25.23 Manufacture of builders' ware of plastic
- 25.24 Manufacture of other plastic products

26 MANUFACTURE OF OTHER NON-METALLIC MINERAL PRODUCTS

26.1 **Manufacture of glass and glass products**

- 26.11 Manufacture of flat glass
- 26.12 Shaping and processing of flat glass
- 26.13 Manufacture of hollow glass
- 26.14 Manufacture of glass fibres
- 26.15 Manufacture and processing of other glass, including technical glassware

26.2 **Manufacture of non-refractory ceramic goods other than for construction purposes; manufacture of refractory ceramic products**

- 26.21 Manufacture of ceramic household and ornamental articles
- 26.22 Manufacture of ceramic sanitary fixtures
- 26.23 Manufacture of ceramic insulators and insulating fittings
- 26.24 Manufacture of other technical ceramic products
- 26.25 Manufacture of other ceramic products
- 26.26 Manufacture of refractory ceramic products

26.3 **Manufacture of ceramic tiles and flags**

- 26.30 Manufacture of ceramic tiles and flags

26.4 **Manufacture of bricks, tiles and construction products, in baked clay**

- 26.40 Manufacture of bricks, tiles and construction products, in baked clay

26.5 **Manufacture of cement, lime and plaster**

- 26.51 Manufacture of cement
- 26.52 Manufacture of lime
- 26.53 Manufacture of plaster

26.6 **Manufacture of articles of concrete, plaster and cement**

- 26.61 Manufacture of concrete products for construction purposes
- 26.62 Manufacture of plaster products for construction purposes
- 26.63 Manufacture of ready-mixed concrete
- 26.64 Manufacture of mortars
- 26.65 Manufacture of fibre cement
- 26.66 Manufacture of other articles of concrete, plaster and cement

26.7 **Cutting, shaping and finishing of ornamental and building stone**

- 26.70 Cutting, shaping and finishing of ornamental and building stone

26.8 **Manufacture of other non-metallic mineral products**

- 26.81 Production of abrasive products
- 26.82 Manufacture of other non-metallic mineral products n.e.c.

OTHERS

- 19.1 Tanning and dressing of leather (within the section: Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear)
- 31.62 Manufacture of other electrical equipment (within the section: Manufacture of electrical machinery and apparatus)
- 50.5 Retail sale of automotive fuel (within the section: Sale, maintenance and repair of motor vehicles and motorcycles; retail of automotive fuel)
- 51.46 Wholesale of pharmaceutical goods (within the section: Wholesale trade and commission trade, except of motor vehicles and motorcycles)
- 51.55 Wholesale of chemical products (within the section: Wholesale trade and commission trade, except of motor vehicles and motorcycles)
- 90.01 Collection and treatment of sewage (within the section: Sewage and refuse disposal, sanitation and similar activities)

ABBREVIATIONS USED IN THIS REPORT

In the text:

%	Per cent
€	Euro(s)
CA	Collective agreement
CB	Collective bargaining
Density	Number of salaried workers or enterprises of the sector affiliated to the organisation divided by total number of salaried workers or enterprises of the sector
GDP	Gross Domestic Product
NACE	Statistical Classification of Economic Activities in the European Community
ND	no data, i.e. no data is available
PAV	Present Annual Value
SD	Social dialogue
SME	Small-to-Medium Enterprise
SSD	Sector social dialogue
SW	Salaried workers

In the tables in the national summaries:

CB	does the organisation take part in collective bargaining?
Density companies or enterprises	Number of enterprises of the sector affiliated to the organisation divided by the total number enterprises of the sector
Density SW	Number of salaried workers of the sector affiliated to the organisation divided by the total number of salaried workers of the sector

Organisations' abbreviations:

AESGP	European Self-Medication Association
AISE	International Association for Soaps, Detergents and Maintenance Products
BIAC	The Business and Industry Advisory Committee to the OECD
BLIC	European Association of the Rubber Industry
CEC	European Confederation of Executives and Managerial Staff (Confédération Européenne des Cadres)
CEEP	European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest
CEFIC	European Chemical Industry Council
CEPE	European Council of Paint, Printing Ink and Artists Colours Industry
CESI	European Confederation of Independent Trade Unions
CIC	International Confederation of Executives and Managerial Staff (Confédération Internationale des Cadres)
COLIPA	European Cosmetic Toiletry and Perfumery Association
CPA	Commonwealth Pharmaceutical Association
EAFP	European Association of Faculties of Pharmacy
ECEG	European Chemical Employers Group
ECITU	European Confederation of Independent Trade Unions

ECPA	European Crop Protection Association
EDMA	European Association of Diagnostic Means
EFBWW	European Federation of Building and Woodworkers
EFFAT	European Federation of Food, Agriculture and Tourism
EFPIA	European Federation of Pharmaceutical Industries and Associations
EGA	European Generic Medicines Associations
EIPG	European Industry Pharmacist Group
EMCEF	European Mine, Chemical and Energy Workers' Federation
EMF	European Metal Federation
EPPA	European Plastics Profile Association
EPSU	European Federation of Public Service Unions
ETF	The European Transport Worker's Federation
ETGLWF	European Textile, Garment and Leather Workers' Federation
ETUC	European Trade Union Confederation
ETUF:TCL	European Trade Union Federation of Textiles, Clothing and Leather
EUPC	European Plastics Converters
Eurochambers	European Chambers of Commerce and Industry
EUROFEDOP	European Organisation of Public Service Employees
EuropaBio	The European Association for Bioindustries
EuroPharm Forum	Forum of European Pharmaceutical Associations
Europharm SMC	European Internet portal for Small and Medium Sized Pharmaceutical companies
FEA	Federation of European Aerosol associations
FECC	European Association of Chemical Distributors
FECCIA	European Federation of Managers in the Chemical and Allied Industries
FECER	European Federation of Executives in the Sectors of Energy & Research
FERPA	European Federation of Retired and Elderly Persons
FICCIA	International Federation of Managers in the Chemical and Allied Industries
FIP	International Pharmaceutical Federation
FMTI	International Confederation of the Workers from Industry
GIRP	European Association of Pharmaceutical Wholesalers
GPEU	Pharmaceutical Group of the European Union
ICC	International Chamber of Commerce
ICCA	International Council of Chemical Associations
ICEM	International Federation of Chemical, Energy, Mine and General Workers' Unions
ICFTU	International Confederation of Free Trade Unions
IFAH	International Federation of Animal Health
IFBWW	International Federation of Building and Wood Workers
IFMA	International Federation of the Pharmaceutical Industry
IFPMA	International Federation of Pharmaceutical Manufacturers & Associations
IG BCE	Mining, Chemical and Energy Industrial Union
IGMA	International Generic Medicines Association
IMF	International Metalworkers' Federation
IN	Nordic Industry Workers
INFEDOP	International Federation of Employees in the Public Service
IOE	International Organisation of Employers
ITF	International Transport Workers' Federation
ITGLWF	International Textile, Garment and Leather Workers' Federation
IUF	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations
MNC	Multinational company
NFS	Council of Nordic Trade Unions
NFU	Nordisk Farmaceutunion
NIF	Nordic Industry Workers' Federation
NTBF	Nordiska Byggnads och Träarbetare Federation
NTF	Nordiska Transportarbetare Federationen
NTO	Nordisk Telekommunikation
OPCE	Interprofessional Employers Businessmen Organisations of European Capital Cities
PGEU	Pharmacists Group of the European Union
PSI	Public Services International
RIOST	International Network of Subcontracting, Industrial Cooperation and Partnership Organizations
SECB	European Endowment for Christian Mine Workers

TEPPFA	The European Plastics Pipe and Fitting Organisation
TNC	Transnational corporations
TUAC	Trade Union Advisory Committee
UEAPME	European Association of Craft Small and Medium-sized Enterprises
UIADM	International Union of Medical Advisers Associations
UMCE	Union of Mediterranean Confederations of Enterprise
UNI	Union Network International
UNI Europa	European Union Network International
UNICE	Union of Industrial and Employers' Confederations of Europe
VAA	Association of salaried academics and managers in the chemical industries
WFIW	World Federation of Industry Workers
WCL	World Confederation of Labour

Disclaimer

The contents of this publication do not necessarily reflect the opinion or position of the European Commission, Directorate-General Employment and Social Affairs. This study has been carried out by independent experts. It therefore does not involve the Commission's responsibility in any way. The European organisations subject of this study have had the opportunity to comment on the content of this study before its final approval¹².

¹² Its approval by the Commission does not imply the approval of any of the European organisations as to its content.

A. Comparative study UE15

1. DESCRIPTION OF THE SECTOR

1.1. Delimitation and scope of activities of the sector

a) European level

At European level, the situation of the social partners is not completely homogeneous. Indeed, the workers' organisation (EMCEF) members cover almost the totality of the NACE 23, 24 and 25. On the other hand, the employers' organisation (ECEG) members include NACE 24 (exceptions: members in France and in Italy who do not represent manufacturing and who belong to NACE 24.4). Moreover, NACE 23 and NACE 25 are rarely covered (or partially covered).

b) National level

For this comparative review, we have endeavoured, in terms of the specific characteristics of each of the countries studied, to present two essential pieces of information:

- Activities included in the sector from the statistical point of view
- Activities included in the sector from the collective bargaining point of view

This information clarifies the delimitation effected at national level and serves as a reference for the remainder of this comparative section. We have made every effort to respect, as closely as possible, the different national concepts and realities.

Activities included in the sector from the statistical and CB point of view by country

Country	Activities included in the sector
Austria	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24, but the membership domains of all employer associations and unions covering this sector are more encompassing than NACE 24. Moreover, the sector is divided into an "industrial" and a craft sector, something which has resulted in a corresponding divide in industrial relations.
Belgium	<ul style="list-style-type: none"> •no statistical delimitation •activities correspond to NACE 24 + 25 + 51.46 + 51.55
Cyprus	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24
Czech Republic	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24 + 23.2
Denmark	<ul style="list-style-type: none"> • activities correspond to NACE 24 (in some cases: + NACE 23 + NACE 25) • activities correspond to NACE 24 (in some cases: + NACE 23 + NACE 25)
Estonia	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24
Finland	<ul style="list-style-type: none"> • activities correspond to NACE 24 • activities correspond to NACE 24 (+plastics industry sector)

France	<ul style="list-style-type: none"> •main chemical industry sectors as defined by the Ministry for Industry: inorganic chemicals and organic chemicals; paracheicals, soaps, perfumes and cleaning preparations; pharmaceuticals. •the scope of the collective agreement (the numerous activities covered by the Union of Chemical Industries (UIC), by an associated employers' organisation and the other activities covered by UIC or by another associated employers' organisation) does not overlap exactly the wider definition of the industrial sectors related to chemicals as established by the Ministry for Industry.
Germany	<ul style="list-style-type: none"> •activities correspond to NACE 24 • activities correspond to NACE 24 + parts of NACE 23, 25 and some service sectors.
Greece	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24
Hungary	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24 + NACE 23 + NACE 25
Ireland	<ul style="list-style-type: none"> •activities correspond to NACE 244, 245 and NACE 247 •activities correspond to NACE 244, 245 and NACE 247, except some of the other chemical companies under NACE 24 (a small minority) which do not take part in social dialogue within the Irish chemical industry
Italy	<ul style="list-style-type: none"> •activities correspond to NACE 24 •the main industry-wide agreements cover NACE 24 + several others sub-sectors, included within NACE 19, 23, 25, 26, 31, 90 (more exactly, 19.1, 23.2, 26.2, 31.62, and 90.01)
Latvia	<ul style="list-style-type: none"> •activities correspond to NACE 24 + NACE 23 + NACE 25 •activities correspond to NACE 24 + NACE 23 + NACE 25
Lithuania	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24 + organisations include members mainly from NACE 23.2 and 50.5
Luxembourg	<ul style="list-style-type: none"> •activities correspond to NACE 24 + NACE 25 •activities correspond to NACE 24 + NACE 25
Malta	<ul style="list-style-type: none"> •activities correspond to NACE 24 + NACE 23 •activities correspond to NACE 24 + organisations include members of firms not formally included in NACE 24
The Netherlands	<ul style="list-style-type: none"> •activities correspond to NACE 24 •different industry categorisation based on affinities in the production system and conditions of employment rather than on the fact whether or not a chemical process is at stake (e.g.: the manufacture of pharmaceuticals is left out, whereas the waste processing industry is included in the definition of the industry).
Poland	<ul style="list-style-type: none"> •activities correspond to NACE 24 •organisations cover part of NACE 24; others include sub-sections of NACE 25 and 23
Portugal	<ul style="list-style-type: none"> •activities correspond to NACE 24 •there is a difference between Chemical Industry and Pharmaceutical Industry and Commerce, both object of CCT
Slovakia	<ul style="list-style-type: none"> •activities correspond to NACE 24, except 24.5 and 24.64 + NACE 25.1 and 25.2 •activities correspond to NACE 24, except 24.5 and 24.64 + NACE 25.1 and 25.2
Slovenia	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24 + NACE 25.1 and 25.2
Spain	<ul style="list-style-type: none"> •official statistics tend to adapt to the NACE 24

	<ul style="list-style-type: none"> •CB usually includes activities corresponding to NACE 24 + NACE 25. On the other hand, activities corresponding to NACE 24.7 are not always included.
Sweden	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24 + part of NACE 23 + NACE 25 + NACE 26
The United Kingdom	<ul style="list-style-type: none"> •activities correspond to NACE 24 •activities correspond to NACE 24

Source: national reports

Except for four countries (Cyprus, Estonia, Greece and The United Kingdom), where the activities correspond exactly to NACE 24 from both statistical and CB points of view, the delimitation is not so homogeneous. Indeed, even if the activities correspond –or tend to adapt- statistically to NACE 24, the situation is rather different for collective bargaining which includes generally NACE 24 or part of it, but covers also other activities. Particular cases concerning the delimitation are France, Ireland, the Netherlands and Portugal.

1.2. Socio-economic features of the sector

This section presents comparative data on the economic weight of the sector and on employment within the sector, the number and size of enterprises as well as the number of the workers and their repartition by size of enterprise. The weight of the sector and the employment within the sector, compared to the economy as a whole, can be considered as a good estimation of the economic importance of the sector and data on enterprises and workers give an overview of the economic structuring of the sector.

Economic weight and employment weight by country

Country	Economic weight and employment weight
Austria	<ul style="list-style-type: none"> •ND •0.9% of total employment
Belgium	<ul style="list-style-type: none"> •ND •5.2% of total employment
Cyprus	<ul style="list-style-type: none"> •0.5% of GDP •0.75% of total employment
Czech Republic	<ul style="list-style-type: none"> •ND •1.1% of total employment
Denmark	<ul style="list-style-type: none"> •3.85% of GDP •1.31% of total employment
Estonia	<ul style="list-style-type: none"> •ND •0.5% of total employment
Finland	<ul style="list-style-type: none"> •4% of GDP •0.8% of total employment
France	<ul style="list-style-type: none"> •ND •1.51% of total employment
Germany	<ul style="list-style-type: none"> •6.4% of GDP •1.4% of total employment
Greece	<ul style="list-style-type: none"> •ND

	<ul style="list-style-type: none"> •ND
Hungary	<ul style="list-style-type: none"> •6% of GDP •1.7% of total employment
Ireland	<ul style="list-style-type: none"> •ND •1.54% of total employment
Italy	<ul style="list-style-type: none"> •ND •1.42% of total employment
Latvia	<ul style="list-style-type: none"> •ND •0.83% of total employment
Lithuania	<ul style="list-style-type: none"> •0.9% of GDP •0.4% of total employment
Luxembourg	<ul style="list-style-type: none"> •0.02% of GDP •ND
Malta	<ul style="list-style-type: none"> •ND •0.69% of total employment
The Netherlands	<ul style="list-style-type: none"> •8% of GDP •10% of total employment
Poland	<ul style="list-style-type: none"> •ND •7.9% of total employment
Portugal	<ul style="list-style-type: none"> •ND •0.76% of total employment
Slovakia	<ul style="list-style-type: none"> •8.5% of GDP •1.15% of total employment
Slovenia	<ul style="list-style-type: none"> •3.3% of GDP •3.1% of total employment
Spain	<ul style="list-style-type: none"> •14.2% of GDP •1.1% of total employment
Sweden	<ul style="list-style-type: none"> •2.4% of GDP •1.9% of total employment
The United Kingdom	<ul style="list-style-type: none"> •2.3% of GDP •1% of total employment

Source: national reports

Enterprises and workers by country

Country	Enterprises (trends relative to number and size)	Workers (trends relative to number and repartition by size of enterprises)
Austria	<ul style="list-style-type: none"> •NACE 24: 370 enterprises •45.7% = enterprises with 10-100 SW 	<ul style="list-style-type: none"> •NACE 24 : 27,141 employees (blue + white collars) •ND

Belgium	<ul style="list-style-type: none"> •NACE 24 + 25 + 51.46 + 51.55: 2,551 enterprises •59.3% = enterprises with <10 SW 	<ul style="list-style-type: none"> •NACE 24 + 25 + 51.46 + 51.55: 117,936 SW •73.5% in enterprises >100 SW
Cyprus	<ul style="list-style-type: none"> •NACE 24.1 to 24.6: 57 enterprises •50.9% = enterprises with 10-100 SW 42.1% = enterprises with <10 SW 	<ul style="list-style-type: none"> •NACE 24.1 to 24.6: 1,728 SW •55% in SW in enterprises >100 SW 36.9% in SW in enterprises with 10-100 SW
Czech Republic	<ul style="list-style-type: none"> •NACE 24 + 23.2: 3,635 enterprises •61%= enterprises with no SW 16.2%= enterprises with 1-9 SW 	<ul style="list-style-type: none"> •NACE 24 + 23.2: 44,061 SW •ND
Denmark	<ul style="list-style-type: none"> •NACE 24: 400 enterprises •39% = enterprises without SW 32% = enterprises with <10 SW 	<ul style="list-style-type: none"> •NACE 24: 28,917 workers full-time •ND
Estonia	<ul style="list-style-type: none"> •NACE 24: 84 enterprises •50% = enterprises with < 10 SW •39.2% = enterprises with 10-100 	<ul style="list-style-type: none"> •NACE 24: 2,923 workers •ND
Finland	<ul style="list-style-type: none"> •NACE 24: 389 enterprises •50% = enterprises with 10-100 SW 	<ul style="list-style-type: none"> •NACE 24: 19373 SW •76.6% in enterprises >100 SW
France	<ul style="list-style-type: none"> •3,257 enterprises •45.5% = enterprises with <10 SW 43% = enterprises with 10-200 SW 	<ul style="list-style-type: none"> •239 186 SW •65.74% in enterprises >199 SW
Germany	<ul style="list-style-type: none"> •NACE 24: 1,861 enterprises •54% = enterprises 50-499 SW 	<ul style="list-style-type: none"> •NACE 24: 464,314 SW •62.7%in enterprises >499 SW
Greece	<ul style="list-style-type: none"> •NACE 24: 985 enterprises •75.9%= enterprises with <10 SW 	<ul style="list-style-type: none"> • NACE 24: 15,222 SW •99.8% in enterprises >10 SW
Hungary	<ul style="list-style-type: none"> •NACE 24 + 23 + 25: 3515 enterprises •92%= enterprises with <20 SW 	<ul style="list-style-type: none"> •NACE 24 + 23 + 25: 75,787 SW •ND
Ireland	<ul style="list-style-type: none"> •NACE 24: 250 units¹³ •54.4% = enterprises 10-100 SW 	<ul style="list-style-type: none"> • NACE 24: 25,436 workers •78% in enterprises >100 workers
Italy	<ul style="list-style-type: none"> •NACE 24: 5,904 enterprises •42% = enterprises <10 SW 	<ul style="list-style-type: none"> •NACE 24: 215,909 workers •72% in enterprises >100 SW
Latvia	<ul style="list-style-type: none"> •NACE 24 + 23 + 25 : 306 enterprises 55% = enterprises with < 10 SW 39% = enterprises with 10-100 SW 	<ul style="list-style-type: none"> •NACE 24 + 23 + 25: 8,522 SW •54.7% in enterprises with > 100 SW 36.1% in enterprises with 10-100 SW
Lithuania	<ul style="list-style-type: none"> •NACE 24: 122 enterprises •58% enterprises with < 10 SW 37% enterprises with 10-100 SW 	<ul style="list-style-type: none"> •NACE 24: 5,614 SW •70% in enterprises with > 100 SW 27% in enterprises with 10-100 SW

¹³ A unit is geographically based. A single legal entity may own several dispersed units.

Luxembourg	<ul style="list-style-type: none"> •NACE 24 + 25 : 40 enterprises •70% = enterprises 10-100 SW 	<ul style="list-style-type: none"> •NACE 24 + 25 : 8,978 workers •ND
Malta	<ul style="list-style-type: none"> •ND •ND 	<ul style="list-style-type: none"> •NACE 24 + NACE 23: 1,022 workers •ND
The Netherlands	<ul style="list-style-type: none"> •NACE 24: 900 enterprises •30.6% = enterprises 10-100 SW 28.4% = enterprises with <10 SW 25.1% = enterprises without SW 	<ul style="list-style-type: none"> •ND (NACE 24: 73,000 full-time-equivalent) •ND
Poland	<ul style="list-style-type: none"> •NACE 24: 3,823 enterprises •76.7% enterprises with <10 SW 	<ul style="list-style-type: none"> • NACE 24: 84,900 SW •ND
Portugal	<ul style="list-style-type: none"> •NACE 24: 671 or 847* enterprises •51.6% = enterprises with <10 SW 	<ul style="list-style-type: none"> •NACE 24: 21,683 or 22,001 •55.2% in enterprises >100 SW
Slovakia	<ul style="list-style-type: none"> •ND •ND 	<ul style="list-style-type: none"> •NACE 24 (except 24.5 and 24.64) + NACE 25.1 and 25.2: 28,887 •ND
Slovenia	<ul style="list-style-type: none"> •NACE 24: 144 enterprises •32% = enterprises with > 100 SW 25%= enterprises with 10-100 SW 23%= enterprises without SW 18%= enterprises with <10 SW 	<ul style="list-style-type: none"> •NACE 24: 13,733 SW (except figures for NACE 24.7 which are confidential) •82% in enterprises >100 SW
Spain	<ul style="list-style-type: none"> •NACE 24:4,617 enterprises •46% = enterprises with <10 SW 	<ul style="list-style-type: none"> •NACE 24: 157,600 workers •65% in enterprises >100 SW
Sweden	<ul style="list-style-type: none"> •NACE 24 + NACE 23 200 + NACE 25 110-25 240 + NACE 26 110 to 26 300 : 3,457 enterprises •54% = enterprises without SW 	<ul style="list-style-type: none"> • NACE 24 + NACE 23 200 + NACE 25 110-25 240 + NACE 26 110 to 26 300 : 72,681 workers •73% in enterprises >100 SW
The United Kingdom	<ul style="list-style-type: none"> •NACE 24: 3,743 enterprises •ND 	<ul style="list-style-type: none"> •NACE 24: 235,000 workers •ND

*depends on the source.

Source: national reports

Among the countries where data are available, we observe that the economic weight of the sector varies between 0.02% (Luxembourg) and 14.2% of GDP (Spain), reaching an average of almost 5% of GDP. In the same way, the employment rate generated by the chemical sector accounts for between 0.4% (Lithuania) and 10% (The Netherlands) of total employment, with an average of 2%.

The number of chemical enterprises is also very different according to the country (from 40 in Luxembourg to nearly 29,000 in Slovakia). However, a strong trend shows the predominance of SMEs or small enterprises with 10 to 100 salaried workers and particularly less than 10 salaried workers. On the other hand, in the Czech Republic, Denmark, The Netherlands, Slovenia and Sweden, a large number of enterprises have no salaried workers at all, while in Germany and Slovenia, the presence of bigger enterprises is greater than in other countries. Another characteristic is the predominance of private companies.

The same trend is observable for the workers: their number fluctuates from 1,728 in Cyprus to 464,314 in Germany. The majority of them work in enterprises with more than 100 workers. Concerning the main particularities, we observe that in comparison with other industries, the level of education in the chemical sector is generally high and the workforce is, in most cases, well-

qualified and highly skilled. This is due partly to the complex character of the industry, and also to the fact that the work is largely automated and hence requires at least some technical education. Average wages are higher than the average for all of manufacturing industry. The exception is Latvia, where the wages in this sector do not differ much from the overall wage level in the country. The great majority of employees work in full-time jobs with open-ended contracts; fixed-term contracts, part-time jobs and temporary work are fairly rare. Even if data on the importance of the underground economy are hard to come by, it seems that its share is probably small, not to say non-existent.

2. DESCRIPTION OF THE ORGANISATIONS ACTIVE IN THE SECTOR

2.1. European level

At European level, the organisations which take part in the European sector social dialogue committee for the chemical industry are the following:

a) European Mine, Chemical and Energy Workers' Federation (EMCEF)¹⁴

EMCEF is a federation which organises 2.5 million workers in 35 countries and 128 national trade unions. One other organisation has the status of observer. EMCEF organises both blue and white-collar workers. As a trade union, it takes care of the interests of its members and pursues the most effective representation of their interests vis a vis the EU institutions and the employers. Some of its main objectives are as follow: to safeguard economic, social, environmental and cultural interests; to enhance relations between affiliated organisations; to promote contacts, relations and negotiations with employers; to follow the European treaties; to promote equal opportunities regardless of gender, race or creed; to harmonise collective bargaining and industrial relations policies; to provide relevant data, information and services. The EMCEF is a member of ETUC and co-operates with other European Industry Federations in the ETUC. EMCEF also works in line with the International Federation of ICEM. The EMCEF organises members in a wide range of industrial areas: Energy - Mines - Chemical - Pharmaceuticals - Rubber - Plastics - Glass - Pulp and Paper. The industrial policy committee looks after industrial, technical and legal matters relevant to these industries. EMCEF has 4 Committees: collective bargaining; European works councils; industrial relations (incl. environment, health and safety); social dialogue. The EMCEF has a long-standing record in creating and co-ordinating European Works Councils. With more than 200 EWCs in all its sectors, EMCEF has been extremely active in shaping one important element of the European social dialogue.

b) European Chemical Employers Group (ECEG)¹⁵

ECEG is a group of 21 national employers' associations from as many European countries. Its members represent the companies of the Chemical Industry and, in some cases, those of related industries also, whether they be upstream or downstream. Via its national member federations ECEG represents some 10,000 companies of the Chemical Industry with more than 1 million employees in Europe. Membership for companies with the national federations organised within ECEG is voluntary in most cases. ECEG is an independent European organisation and was founded by 11 national employer associations in January 2002 in order to represent the Chemical Industries interests in the areas of Social Affairs and Social Dialogue. It is a partner, within the Cefic family of European organisations, representing the interests of the European Chemical Industry in many different areas. In addition to its close relationship with Cefic, ECEG closely works together with UNICE and other European sector employers organisations. Since December 2004, ECEG has run a formalised (i.e. acknowledged by the European Commission) Social Partner Dialogue with its trade union counterpart EMCEF for the EU Chemical Industry.

¹⁴ Source: www.emcef.org and Reinhard Reibsch, General Secretary of EMCEF "European Mine, Chemical and Energy Workers Federation"/Brussels.

¹⁵ Source: Lutz Mühl, Secretary of ECEG "European Chemical Employers Group"/Brussels.

2.2. National level

At national level, the situation relative to the organisations active within the sector is heterogeneous. The main objective of this part is to highlight these differences and also the similarities which could appear. We will present the organisations active within the chemical industry sector by country, membership, possible recognition of social partners and role within the CB at sector level, as well as direct European affiliation(s).

Note: Direct affiliation refers to situations where a given organisation is affiliated to, and is therefore a member of, another organisation – for instance at European level. By contrast, an “indirect” affiliation refers to a situation in which a given organisation A is affiliated to another one –organisation B- and the organisation B is affiliated to a third one –organisation C-. In this latter case, A is “indirectly a member” of C.

a) Workers' organisations

Workers' organisations active in the sector by country

Country	Organisations	Total members (members in the sector)	Possible recognition of social partners	Role in the CB at sector level	European affiliations (direct)
Austria	The Union of the White-Collar Workers of the Private Sector	287,558 (ND)	dependent sub-unit of a federation which has the status of a legal entity	Negotiates autonomously but signs CAs formally in the name of its federation	-
	The Union of the Blue-Collar Workers of the Chemical Industry	34,018 (ND)	dependent sub-unit of a federation which has the status of a legal entity	Negotiates autonomously but signs CAs formally in the name of its federation	EMCEF
Belgium	Belgian General Federation of Labour	1,300,000 (ND)	recognition regulated by law	Negotiates and signs CAs	ETUC EMCEF**
	Confederation of Christian Trade Unions	1,600,000 (ND)	recognition regulated by law	Negotiates and signs CAs	ETUC EMCEF**
	Federation of Liberal Trade Unions of Belgium	220,000 (3,748)	recognition regulated by law	Negotiates and signs CAs	ETUC EMCEF
Cyprus	Cyprus Industrial, Commercial, Press-Printing and General Workers Trade Union (SEVETTYK) PEO	9,000 (350)	recognition regulated by the Cyprus Industrial Relations Code	Negotiates and signs CAs	UNI Europa
	Cyprus Industrial Workers Federation, (OVIEK) SEK	12,000 (900)	recognition regulated by the Cyprus Industrial Relations Code	Negotiates and signs CAs	EMCEF UNI Europa EMF EFFAT ETUFTCL
	Federation of Construction, Mines and related Occupations SEK	10,000 (120)	recognition regulated by the Cyprus Industrial Relations Code	Negotiates and signs CAs	-
Czech Republic	Trade Union ECHO	18,400 (ND)	Conditions authorising bodies to conduct CB as regulated by law	Only union that conducts sector CB, signs CAs	EMCEF
Denmark	Central Organisation of Industrial Employees	306,511 (ND)	Mutual recognition within the system of collective bargaining	Negotiates and signs CAs	EMCEF

	United Federation of Workers, 3F	365,500 (884)	Mutual recognition within the system of collective bargaining	Represented in the negotiation by the cartel (Central Organisation of Industrial Employees) created by the unions	-
	The Union of Commercial and Clerical Employees in Denmark, HK	367,000 (3,661)	Mutual recognition within the system of collective bargaining	Represented in the negotiation by the cartel created by the unions	-
	Danish Metalworkers Union	146,000 (ND)	Mutual recognition within the system of collective bargaining	Represented in the negotiation by the cartel created by the unions	-
	Danish Union of Electricians	30,000 (ND)	Mutual recognition within the system of collective bargaining	Represented in the negotiation by the cartel created by the unions	EMCEF
	Danish Association of Professional Technicians	32,000 (330)	Mutual recognition within the system of collective bargaining	Represented in the negotiation by the cartel created by the unions	-
	Danish Laboratory Technicians	10,500 (6,200)	Mutual recognition within the system of collective bargaining	not present in chemical industry	-
	The Danish Society of Engineers, IDA	61,000 (3,000)	Mutual recognition within the system of collective bargaining	not present in chemical industry	EMF
	Association of Danish Pharmacists	4,000 (1,600)	Mutual recognition within the system of collective bargaining	not present in chemical industry	NFU
	The Danish Association of Masters and PhDs	34,600 (379)	Mutual recognition within the system of collective bargaining	not present in chemical industry	-
	The Organisation of Managerial and Executive Staff in Denmark	74,400 (2,233)	Mutual recognition within the system of collective bargaining	not present in chemical industry	CEC
Estonia	No central trade union organisations at sector level	-	-	ONLY SD AT ENTERPRISE LEVEL	-
Finland	Chemical Workers' Union	49,000 (49,000)	no formal recognition system on the part of the social partners in Finland	Negotiates and signs CAs	EMCEF ETUF:TCL
	Finnish Electrical Workers' Union	32 000 (100)	no formal recognition system on the part of the social partners in Finland	Negotiates and signs CAs (very small player representing one specialised group of workers)	EMCEF EMF IN
	Union of Salaried Employees TU	125 000 (11,000)	no formal recognition system on the part of the social partners in Finland	Negotiates and signs CAs	EMCEF Nordiska Metall + NIF IN
France	Federation of the Chemical Industries-CGT	25,000 (13,000)	representative by law	Negotiates and signs CAs	EMCEF
	Federation of the Chemical and Energy Industries-CFDT	ND (ND)	representative by law	Negotiates and signs CAs	EMCEF
	Chemical Federation CGT-FO	15,000 (ND)	representative by law	Negotiates and signs CAs	EMCEF

	Federation of the Chemical, Mine, Textile and Energy Industries-CFTC	ND (3,000)	representative by law	Negotiates and signs CAs	EMCEF
	Federation of managerial and professional staff of the Chemical, Parachemical and Related Industries- CFE-CGC	ND (3,000)	representative by law	Negotiates and signs CAs	FECCIA
Germany	Mining, Chemical and Energy Industrial Union	771,000 (200,000)	shows characteristics established by Federal Labour Court	Negotiates and signs CAs	EMCEF ETGLWF
	Chemicals Executives Union	28,000 (18,000)	shows characteristics established by Federal Labour Court	Negotiates and signs CAs	FECCIA
	Christian Chemicals and Energy Workers' Union	15,408 (13,200)	shows characteristics established by Federal Labour Court	Negotiates and signs CAs	SECB
Greece	Pan-Hellenic Association of Pharmacists (PEF)	2,200 (ND)	mutual recognition	Negotiates and signs CAs	EIPG
	Federation of Employed Pharmaceutical and United Occupations of Greece (OEFSEE)	2,950 (2,950)	mutual recognition	Negotiates and signs CAs	-
	Hellenic Federation of Medical Advisers (POIE)	160 (160)	mutual recognition	Negotiates and signs CAs	-
	Employee Federation of the Chemicals' Industry of Greece (OEHVE)	6,870 (6,870)	mutual recognition	Negotiates and signs CAs	-
	Pan-Hellenic Association of Manufacturing Chemical Scientists (PSHV)	1,200 (180)	mutual recognition	Negotiates and signs CAs	-
Hungary	MOL Chemistry Industry Workers' Trade Union	8,850 (3,929)	Recognition by the Hungarian Labour Code	Negotiates and signs CAs	EMCEF
	Federation of Trade Unions of the Chemical, Energy and Allied Workers	26,000 (17,500)	Recognition by the Hungarian Labour Code	Negotiates and signs CAs	EMCEF
Ireland	The Services, Industrial, Professional and Technical Union	Over 200,000 (ND)	recognised under its affiliation to an national organisation which takes part as a social partner in the national collective agreements	takes part in consultations	EMCEF
Italy	Chemical and Allied Workers' Union	126,774 (ND)	mutual recognition	Negotiates and signs CAs	EMCEF
	Energy, Fashion, Chemicals and Allied Industries Federation	136,098 (55,670)	mutual recognition	Negotiates and signs CAs	EMCEF ETUF EPSU
	Union of Italian Chemicals, Energy and Manufacturing Workers	80,184 (± 23,000)	mutual recognition	Negotiates and signs CAs	EMCEF

	UGL Federation of Italian Chemical Workers	ND (ND)	mutual recognition	takes part actively in the social dialogue, but slight influence on negotiations	-
	Autonomous Federation of Italian Chemicals Workers	12,305 (ND)	mutual recognition	takes part actively social dialogue, but slight influence on negotiations	-
	Italian Autonomous Federation of Chemical Workers	± 10,000 (± 6,000)	not recognised at national level as representative within the sector	takes part actively in social dialogue, but representation of singular cases	-
	National Federation of Industrial Company Managers	± 80,000 (± 14,000)	mutual recognition	takes part actively in the social dialogue, but representation of singular cases	FECCIA
Latvia	Latvian Industrial Sectors Trade Union (LISTU)	7,000 (ND)	no formal or reciprocal recognition systems	ONLY SD AT ENTERPRISE LEVEL	-
Lithuania	Lithuanian Chemical Industrial Workers' Union Federation	5,000 (3,000)	no formal or reciprocal system of recognition	Negotiates and signs CAs	-
Luxembourg	Federation of the Chemicals, Ceramics, Glass and other industries	28,000 (ND)	representative at national level by law	ONLY SD AT ENTERPRISE LEVEL but participates in CB, coordination role	- ¹⁶
	Wood, rubber, ceramics, chemicals, paper, plastic, textiles and glass union	ND (ND)	recognised representative at national level by law	ONLY SD AT ENTERPRISE LEVEL but participates in CB, coordination role, participates in consultations with the public powers	- ¹⁷
	National Private Sector Salaried Employees' Union	1,500 (ND)	not representative nationally nor at sector level	ONLY SD AT ENTERPRISE LEVEL but coordination role in CB	-
Malta	General Workers' Union (GWU)	46,489 (ND)	Reciprocal recognition	ONLY SD AT ENTERPRISE LEVEL	EMCEF
	Union of United Worker	25,901 (± 25)	Reciprocal recognition	ONLY SD AT ENTERPRISE LEVEL	EUROFEDOP
	Malta Chamber of Pharmacists	110 (6)	Reciprocal recognition	ONLY SD AT ENTERPRISE LEVEL	EuroPharm PGEU (observer)
	Union of Assistant Chemists	30 (5)	*recognition as it is listed in the register of trade unions held by the Registrar of Trade Unions *but does not have the recognition to carry out CB in the chemical sector due to its small number of members	ONLY SD AT ENTERPRISE LEVEL	-

¹⁶ The European organisation EMCEF claims that this organisation is directly affiliated to EMCEF. Nevertheless, after consultation of the national expert, the latter confirmed that the Federation of the Chemicals, Ceramics, Glass and other industries is affiliated directly to LCGB and is, through this organisation, an indirect member of EMCEF.

¹⁷ Same comment as above.

The Netherlands	FNV allied unions, Section Processing Industry	450,000 (22,000 active and 4,170 inactive)	mutual recognition	ONLY SD AT ENTERPRISE LEVEL	EMCEF
	CNV industrial, food production and transport sectors, sector chemistry and Industry	8,000 (5,700 active and 2,300 inactive)	mutual recognition	ONLY SD AT ENTERPRISE LEVEL	EMCEF
	The union	ND (ND)	mutual recognition	ONLY SD AT ENTERPRISE LEVEL	EMCEF
	Association of higher personnel	ND (ND)	mutual recognition	ONLY SD AT ENTERPRISE LEVEL	EMCEF
Poland ¹⁸	Chemical Industry Workers Secretariat of the Independent Self-Governed Trade Union 'Solidarnosc'	37,552 (15,403)	Recognition through recognition of Solidarnosc	Negotiates and can sign CAs at sector level	EMCEF
	Pharmaceutical Industry Workers National Section of ISTU 'Solidarnosc'	3,500 (3,500 in NACE 24.4)	Recognition through recognition of Solidarnosc	Negotiates and can sign CAs at sector level	-
	Chemical Industries National Section of ISTU 'Solidarnosc'	11,903 (11,903 all in NACE 24, except in 24.4)	Recognition through recognition of Solidarnosc	Negotiates and can sign CAs at sector level	-
	Trade Union Federation of Chemical, Glass and Ceramic Industries in Poland	20,000 SW + 15,000 pensioners	recognised under its affiliation to an national organisation which respects the criterion of representativeness	Negotiates and can sign CAs at sector level	EMCEF
	Chemical Industries Secretariat of the ISTU 'Solidarnosc-80'	10,000 (10,000, in NACE 24.1, 24.3 and 24.6)	Recognition through recognition of Solidarnosc-80	Negotiates and can sign CAs at sector level	-

¹⁸ EMCEF notes that "the two trade unions in the Pharmaceutical Industry and the one of ISTU Solidarnosc are not affiliated to EMCEF". However, the national expert wishes to specify that Solidarnosc is organised under different secretariats, according to sector, amongst which is the one that we concerns us for the purposes of this study, the Chemical Industry Workers Secretariat of ISTU "Solidarnosc" - Sekretariat Przemyslu Chemicznego NSZZ "Solidarnosc". Each secretariat has a certain number of sections, which generally represent narrower professional groupings. With regard to the chemical industry workers secretariat, amongst others, it covers the two following sections, relevant to this study : the Pharmaceutical Industry Workers' National Section of ISTU "Solidarnosc" - Sekcja Krajowa Pracownikow Przemyslu Farmaceutycznego NSZZ "Solidarnosc" and the Chemical Industries' National Section of ISTU "Solidarnosc" - Sekcja Krajowa Przemyslu Chemicznego NSZZ "Solidarnosc". So it is this secretariat which is a member of EMCEF. Both sections are members of the secretariat and, as such, they consider themselves indirectly affiliated to, and the secretariat confirms this also. These confirmations were obtained from Mr Konecki, President of the secretariat. The sections certainly do not appear on EMCEF's list, which would account for the remark. However, EMCEF, by affiliating the secretariat, which is composed of these two sections in particular, covers the workers who are members of these two sections. It should be noted that, in general in Poland, workers have a greater feeling of belonging to the section than to the secretariat, which is more of a "super-structure".

	National Alliance of Trade Unions for Continuous Work	18,000 (6,000, in NACE 24.1 and 24.7)	recognised under its affiliation to an national organisation which respects the criterion of representativeness	Negotiates and can sign CAs at sector level	-
	Engineers and Technicians Trade Union	20,500 (ND)	Legally registered	Negotiates and can sign CAs at sector level	-
Portugal	Democratic Trade Union of Energy, Chemical, Textile and other Industries	10,000 (1,500)	formal or reciprocal recognition	Negotiates and signs CAs	EMCEF
	Trade Union for Chemical, Pharmaceutical, Petrol and Gas Worker of the North	5,216 (ND)	ND	Negotiates trough its federation	-
	Trade Union of Chemical, Pharmaceutical, Petrol and Gas Worker from the Centre, South and Islands	7,200 (3,500)	formal or reciprocal recognition	Negotiates trough its federation and has the right to be consulted on various matters	-
Slovakia	Chemistry Trade Union of the Slovak Republic	20,000 (18,000)	Recognition systems supported by legislation	Negotiates and signs CAs	EMCEF
Slovenia	Trade Union of Chemical, Non-Metallic and Rubbers Industry of Slovenia	11,530 (8,000)	Mutual recognition	Negotiates and signs CAs	EMCEF
Spain	Federation of Textile-Leather Industries, Chemicals and Related Industries of Workers' Commissions	67,000 (35,000)	recognised representative at national level	Negotiates and signs CAs	EMCEF
	Federation of Related Industries of Workers' General Union	75,000 (22,500)	recognised representative at national level	Negotiates and signs CAs	EMCEF
	Basque Workers' Solidarity – Diversity of sectors	22,550 (2,250)	recognised representative at national level	does not take part in the bargaining of the most important CAs	EMCEF
	Confederation of Federations of Chemical Managers	90 (90)	recognised representative at national level	Role only at enterprise level	FECCIA
Sweden	The Industrial Workers' Union	71,040 (28,490)	representative	Negotiates and signs CAs	EMCEF
	The Swedish Federation of Industrial Employees	301,100 (25,000)	representative	Negotiates and signs CAs	EMCEF
	The Swedish Association of Graduate Engineers	75,900 (5,000)	representative	Negotiates and signs CAs	EMCEF
	The Swedish Association for Managerial and Professional Staff	65,000 (500)	representative	Negotiates and signs CAs	CEC
The United Kingdom	Amicus	1.2m (12,000)	voluntary	negotiate on behalf of employees in the industry, and are signatories of the Charter with the CIA	EMCEF
	GMB	600,000	voluntary	negotiate on behalf of employees in the	EMCEF

		(10,000)		industry, and are signatories of the Charter with the CIA	
	Transport and General Workers' Union (TGWU)	835,000 (40,000)	voluntary	negotiate on behalf of employees in the industry, and are signatories of the Charter with the CIA	EMCEF
	Union of Shop, Distributive and Allied Workers (USDAW)	340,000 (ND)	voluntary	negotiate on behalf of employees in the industry, and are signatories of the Charter with the CIA	EMCEF
	Prospect	104,000 (ND)	voluntary	small presence in the sector; not signatory of the chemical industry charter	EMCEF
	British Association of Colliery Management (BACM)	3,500 (ND)	voluntary	no major company presence; not signatory of the chemical industry charter	EMCEF CEC FECER
	National Association of Colliery Overmen, Deputies and Shotfirers (NACODS)	610 (ND)	voluntary	does not take part in consultations at company or site level and does not have agreements at major companies; not signatory of the chemical industry charter	EMCEF

*D : direct affiliation; I : indirect affiliation; **thanks to its Professional groups.

Source: national reports

Note: Besides the information presented within the table, it is worth noting that unavailable data on members working in the sector per organisation are due to problems in evaluating the figures, as may occur, for example, if the delimitation of activities within the organisation which does not correspond to the national delimitation of the sector.

FECCIA requests the addition of some organisations within this study. However, further to consultation of national experts, we noticed that in most cases, these organisations are not specific to the chemical sector. For that reason, we decided to note these organisations which are not specifically involved in the chemical sector within a separate text in the comparative part of the report. In some cases, the national expert gives a brief explanation as to why he did not consider it relevant to give more information on the organisation.

Austria

Wirtschaftsforum der Führungskräfte (WdF) / Austrian Managers Association, member of CEC

The national expert did not consider it relevant to give more information on the organisation and to include it within the report for three main reasons:

1. The WdF is not a business association; nor is it a trade union. It is actually a club of managers.
2. The WdF lacks any involvement as an interest association in industrial relations.
3. The WdF organises managers across sectors, hence its activities do not specifically refer to the chemical sector.

Belgium

La Confédération Nationale des Cadres/Nationale Confederatie van het Kaderpersoneel (CNC/NCK) / Belgian Confederation of Executives and Managerial Staff, member of CEC

In fact, this association was set up in 1966. It presents itself as a national, apolitical and lay organisation which defends the social and economic interests of managerial staff. In 1986, it was recognised by Royal Decree as a representative organisation for managerial staff, which enables it to take part in social elections. In the 2004 elections, it obtained 10.4 % of the seats available

for managerial staff in the works councils, of which about twenty were in the chemical industry. The CNC/NVK claims to affiliate more than 10,000 managers. Its funding comes from membership subscriptions. There are 2 – 3 people employed by the organisation. It should be noted that the CNC/NCK is not recognised as representative organisation at sector level and is not a full social partner. As such, it has no seat on any joint-appeals board. Moreover, the organisation does not take part in tripartite concertation and does not have the ability to sign CAs at enterprise level. La CNC/NCK is a member of the ETUC, CEC and CIC.

Czech Republic

Česká Manažerská Asociace (CMA) / Czech Management Association, observer member of the CEC

The national expert did not consider it relevant to give more information on the organisation and to include it within the report for three main reasons:

- 1) It is member of the biggest employers' organisation – the Confederation of Industry of the Czech Republic (<http://www.spcr.cz/cz/sdruzeni/index.htm>);
- 2) It is a professional organisation of managers and its members are individuals (managers) and collective members (firms);
- 3) The CMA does not conduct collective bargaining.

Greece

Enossi Anotaton Stelehon Epihirisseon (EASE) / Association of Chief Executive Officers, member of CEC

EASE was established in 1986, with the purpose of contributing to the continuous improvement of the level of top management and to make good use of the knowledge and the experience of its members to the benefit of the Greek economy. EASE has 400 members that manage a large segment of the most dynamic companies in Greece. The Association does not have the legal capacity to conclude collective labour agreements but participates in the social dialogue process and has recently become a member of the National Competitiveness Council. EASE is a member of the Confederation Européenne des Cadres (CEC). This organisation participates in the social dialogue process but does not conclude a collective labour agreement.

Note also that this organisation only covers the chemical industry sector very partially; moreover, it can hardly be characterised as a classical trade union, representing salaried workers, since it really represents management staff and well paid senior managers who often have shares in the company.

Hungary

Menedzserek Országos Szövetsége / National Association of Managers, observer member of CEC.

The legal predecessor of the organisation (Gazdasági Vezetők Érdekképviseleti Szervezete; Organisation of Chief Executive Officers) was founded in 1989 in order to ensure a professional forum for the Hungarian managers and to represent their interests as employees. The organisation in its current form has been operating since 1993. The National Association of Managers operates in various sectors of the Hungarian economy. The 640 members of the Association are natural persons; leaders and managers employed in Hungarian and multinational firms operating in Hungary. Around 60 of them work in the chemical sector. The Association has two regional organisations (in Debrecen and Szeged), and two sections (Section of Young Managers and the Section of Mentor Managers, which gives advice for the leaders and managers of small- and medium-sized enterprises). The leading body of the organisation is the presidency with the president at its head. The secretary general is responsible for the operation of the Association. The representatives of the Association rarely take part directly in the sector social dialogue in the chemical industry but help the participants as advisers. The staff is composed of 12 people. The organisation takes part in consultations at sector level. However, the representatives of the Association rarely take part directly in the sector social dialogue in the chemical industry but help the participants as advisers. There were no CAs signed by the organisation in 2003 and 2004. The organisation does not take part in tripartite concertation.

Poland

Porozumienie Związków Zawodowych (KADRA) / Alliance of Trade Unions, member of CEC

The national expert did not consider it relevant to give more information on the organisation and to include it within the report because KADRA is not involved in the chemical sector. KADRA confirmed clearly to the national expert that the organisation is not involved in the chemical sector.

Stowarzyszenie Menedżerów w Polsce (SMWP) / Managers Association in Poland (MAP), observer member of CEC

The national expert did not consider it relevant to give more information on the organisation and to include it within the report, because SMWP is not involved in the chemical sector. In addition, SMWP is not recognised either as an employers' association or as trade union.

Slovenia

Združenje Managerjev Slovenije / Managers' Association of Slovenia (MAS), member of CEC

The national expert did not consider it relevant to give more information on the organisation and to include it within the report for three main reasons:

1. Managers' Association could be described as an organisation (but not as a trade union) with members from the top positions in different companies.
2. This Managers' Association is definitely not an organisation which would be or is included in social dialogue in general nor in the social dialogue in the sector of the Chemicals industry.
3. Neither the representatives of the trade union nor those of the Chamber of Commerce of Slovenia consider the Managers' Association as an actor in the social dialogue.

For further information, see: <http://www.zdruzenje-manager.si/eng/>

Spain

Confederación de Cuadros y Profesionales (CCP) / Managers' and Professionals' Confederation, member of CEC

The national expert did not consider it relevant to give more information on the organisation and to include it within the report for the following reason: accordingly with FEQUICC, the CCP should not be included because only sector organisations are included in the report. The Confederación de Cuadros y Profesionales (CCP) embraces FEQUICC, which is the sector organisation (in the Chemical industry) of the CCP. Note also that the 90 affiliated members of FEQUICC are also affiliated to the CCP.

United Kingdom

Managerial and Professional Staff Association (MPA), member of CEC

The MPA is a specialised federation of Associations and Unions that represent the interests of managerial, professional and technical staff. The MPA was formed by the merger of two other federations, COMPS (Council of Managerial and Professional staff) and MPG (Federation of Managerial, Professional and General Associations), in the 1980s. Of its 24 affiliated organisations, 13 MPA members are certified as trade-unions, and 11 of these 13 hold a Certificate of Independence. The MPA's Associations have between them around 200,000 individual members, across a wide range of industries. The Association is directly affiliated to the CEC.

Association of Management and Professional Staffs (AMPS)

AMPS is now a section of the Amicus, but is self governing, has its own staff and is fully autonomous in all industrial relations activities. It is a UK registered trade union whose origins go back to the British Association of Chemists founded in 1918. Its original membership of graduate scientists in the UK chemical industry has since widened to include managers, scientists and other graduate level staff in a range of science based UK industries. These include chemicals, pharmaceuticals, and textiles, and there is also a special section for professional divers. AMPS can represent its members in negotiations with employers, and deal with grievances, and represent members in employment tribunals. Even if its website refers to negotiations, it is not an independent signatory to the Chemical Industry Charter which involved the CIA, Amicus, the GMB, the T&G and Usdaw. By virtue of its position within Amicus, the AMPS is affiliated to the Trades Union Congress (TUC). It is also a member of the MPA. At European and international levels, it is a direct member of FECCIA and FICCIA and is indirectly affiliated to EMCEF, ETUC, CEC and CIC.

b) Employers' organisations

Employers' organisations active in the sector by country

Country	Organisations	Number members (number SW)	Recognition	Role in the CB at sector level	European Affiliations (direct)
Austria	The Federal Organisation of the Chemical Industry	310 (45,156)	Recognised as part of its federation	Negotiates and signs CAs	CEFIC, CEPE, COLIPA, ECPA, EFPIA, EUPC, TEPPFA, EPPA, EuropaBio, ECEG, Europharm SMC
	The Federal Organisation of Chemical Crafts	1,014 (38,061)	Recognised as part of its federation	The BIC does not participate in boards affecting the sector (there are no affiliations relating to the sector under consideration)	-
Belgium	Federation of Belgian Chemical Industries	750 (97,016)	recognition regulated by law	Negotiates and signs CAs	ECEG CEFIC
Cyprus	Cyprus Pharmaceutical Manufacturers Association	5 (400)	recognition through their membership of the Cyprus Chamber of Commerce and Industry (CCCI)	It does not deal with CB and do not sign any CA	-
	Cyprus Association of Paints, Varnishes and Adhesives Manufacturers	8 (205)	recognition through their membership of the CCCI	It does not deal with CB and do not sign any CA	-
	Cyprus Aerosol, Detergents & Cosmetics Manufacturers Association	6 (150)	recognition through their membership of the CCCI	It does not deal with CB and do not sign any CA	Federation of European Aerosol
Czech Republic	Association of Chemical Industry of the Czech Republic (SCHP CR)	114 (ND)	Conditions authorising bodies to conduct CB as regulated by law	Negotiates and signs CAs	CEFIC ECEG
Denmark	Confederation of Danish Industries, DI	255 (30,500)	Mutual recognition within the system of collective bargaining	Negotiates and signs CAs	ECEG UNICE
Estonia	Federation of Estonian Chemical Industry	32 (ND)	-	ONLY SD AT ENTERPRISE LEVEL	CEFIC ECEG
Finland	The Chemical Industry Federation of Finland	280 (38,000)	no formal recognition	Negotiates and signs CAs	CEFIC ECEG

			system on the part of the social partners in Finland		
France	Union of Chemical Industries	1,191 (ND)	Employers' groupings determine their own mode of deliberation	Negotiates and signs CAs	CEFIC ECEG
Germany	German Federation of Chemical Employers' Associations	1,900 (580,000)	show characteristics established by Federal Labour Court	Negotiates and signs CAs	ECEG
Greece	Hellenic Association of Pharmaceutical Companies (SFEE)	64 (9,000)	mutual recognition	Negotiates and signs CAs	EFPIA
	Pan-Hellenic Association of the Pharmaceutical Industry (PEF)	33 (500)	mutual recognition	Negotiates and signs CAs	-
	Association of Representatives of Pharmaceutical Products (SAFEE)	ND (ND)	mutual recognition	Negotiates and signs CAs	ND
	Pan-Hellenic Union of the Industries & Representatives of Cosmetics & Perfumes (PSVAK)	71 (7,500)	mutual recognition	Negotiates and signs CAs	COLIPA
	Pan-Hellenic Association of Greek Cosmetics and Beauty Products Manufacturers and Artisans (PEVVEKKP)	40 (400)	mutual recognition	Negotiates and signs CAs	-
	Pan-Hellenic Association of Wholesalers and Qualified Pharmacists (PSF)	130 (2,500)	mutual recognition	Negotiates and signs CAs	GIRP
	Association of Representatives, Importers and Producers of Veterinary Drugs (SAEPKF)	22 (ND)	mutual recognition	Negotiates and signs CAs	-
	Association of Hellenic Chemical Industries (SEHV /HACI)	57 (3,000)	mutual recognition	*does not have the status of social partners *hence: does not participate in collective bargaining procedures and does not sign collective agreement *but: puts its demands forward to the state authorities	CEFIC
	Association of Greek Industry of Detergents and Soaps (SEVAS)	12 (2,000)	mutual recognition	*does not have the status of social partners *hence: does not participate in collective bargaining procedures and does not sign collective agreement *but: puts its demands forward to the state	-

				authorities	
Hungary	HUNGAMOSZ, Association of Hungarian Aluminium Producers	5 (ND)	Recognition by the Hungarian Labour Code	does not take part at social dialogue and does not sign CA	UNICE
	MAVESZ, Hungarian Chemical Industry Association	52 (22,600)	Recognition by the Hungarian Labour Code	Negotiates and signs CAs	CEFIC ECEG EUPC
	MAGYOSZ, Hungarian Pharmaceutical Manufacturers' Association	47 (13,944)	Recognition by the Hungarian Labour Code	Negotiates and signs CAs	AESGP
	MAGUSZ, Hungarian Rubber Manufacturers' Association	30 (ND)	Recognition by the Hungarian Labour Code	Negotiates and signs CAs	UNICE BLIC
Ireland	Pharmaceutical Ireland	55 (ND)	recognised under its main organisation which takes part as a social partner in the national collective agreements	does not negotiate	CEFIC
Italy	Italian Federation of the Chemical Industry	± 1,350 (± 103,000)	mutual recognition	Negotiates and signs CAs	ECEG CEFIC
	Italian Association of the Pharmaceutical Industry	240 (± 73,000)	mutual recognition	Negotiates and signs CAs	EFPIA
	Italian Association of Small and Medium-sized Chemical companies	± 1,300 (± 30,000)	mutual recognition	Negotiates and signs CAs	-
	General Italian Confederation of Artisans	ND (ND)	mutual recognition but not very representative of the sector	takes part in CB	UEAPME
	National Mechanical Engineers' Association	ND (ND)	mutual recognition but not very representative of the sector	Negotiates and signs CAs	-
	Independent Confederation of Artisans' Organisations	ND (ND)	mutual recognition but not very representative of the sector	takes part in CB	-
	Confederation of Italian Free Crafts Associations	ND (ND)	mutual recognition but not very representative of the sector	takes part in CB	-
Latvia	Association of Latvian Chemical and Pharmaceutical Industry Producers (ALCPIP)	27 (2,000)	no formal or reciprocal recognition systems	ONLY SD AT ENTERPRISE LEVEL but takes part in consultations at sector level	COLIPA CEFIC (as observer) ECEG
Lithuania	Association of Lithuanian Chemical Industry	23 (7,000); in NACE 24:	no formal or reciprocal	Negotiates and signs CAs	CEFIC

	Enterprises	12 (4,000)	system of recognition		ECEG
Luxembourg	FEDIL industry, construction, business services	40 (8,978)	not considered as an employers' organisation since signs CAs individually by each company	ONLY SD AT ENTERPRISE LEVEL but centralises information on the sector	-
Malta	Malta Employers Association (MEA)	230 (36,000); in the sector: 30 (± 3,000)	recognition as it is listed in the register of employers' associations held by the Registrar of Trade Unions	ONLY SD AT ENTERPRISE LEVEL	CEEP OPCE
	Malta Federation of Industry (FOI)	300 (25,000); in the sector: ND	recognition through reciprocal recognition systems on the part of social partners	ONLY SD AT ENTERPRISE LEVEL	UNICE UMCE
The Netherlands	Association of Dutch Chemical Industry	600 (ND)	Mutual recognition	ONLY SD AT ENTERPRISE LEVEL	CEFIC
	General Employers' Association Netherlands	200 (ND)	Mutual recognition	ONLY SD AT ENTERPRISE LEVEL	-
Poland	Polish Chamber of Chemical Industry	62 (ND)	recognised under its affiliation to an national organisation which respects the criterion of representativeness	*negotiates *has the power to sign CAs, but has not so far signed any at this level	ECEG EAFP
	Polish Union of Employers of the Pharmaceutical Industries	20 (10,000)	recognised under its affiliation to an national organisation which respects the criterion of representativeness	*it has above all a lobby role against the state and against the other employers rather than against workers *thus, even it has the power to sign CAs, it prefers to keep the social dialogue at company level and focusing its action on the economic defence of its members	EGA
	Wielkopolski Union of Private Employers	2 (293)	No national recognition	It does not take part in negotiations of a CA at this level (it is a regional employers' organisation)	-
	Business Centre Club- Employers' Union	ND (ND)	It respects the criterion of representativeness; thus, it is directly recognised as a national organisation	ND	ND
Portugal	Portuguese Association of Chemical Enterprises	55 (ND)	ND	Negotiates and signs CAs	ECEG

	Portuguese Association of the Pharmaceutical Industry	139 (10,200)	formal or reciprocal recognition	Negotiates and signs CAs	EFPIA AESGP
	Portuguese Association of Paint and Varnish Manufacturers	73 (3,512)	ND	Negotiates and signs CAs	CEPE
Spain	Spanish Chemical Industry Employers' Federation	1,200 (109,000)	recognition regulated by law	Negotiates and signs CAs	CEFIC ECEG
	Spanish Cosmetic Toiletry and Perfumery Association	250 (18,000)	recognition regulated by law	Negotiates and signs CAs	COLIPA
	Pyrotechnics Manufacturers' Association of the Community of Valencia	17 (500)	recognition regulated by law	Negotiates and signs CAs (for the Community of Valencia)	-
	Chemical Employers Association	80 (4,500)	recognition regulated by law	Negotiates and signs CAs (in Cantabria)	-
Slovakia	Association of Chemical and Pharmaceutical industry of the Slovak Republic	35 (17,300)	Recognition systems supported by legislation	Negotiates and signs CAs	CEFIC ECEG
Slovenia	Chemical Industries Association	163 (11,856)	Mutual recognition	Negotiates and signs CAs	CEFIC ECEG
Sweden	Swedish Industrial and Chemical Employers' Association	714 (\pm 71,000)	recognition	Negotiates and signs CAs	ECEG
The United Kingdom	Chemical Industries Association	150 (ND)	voluntary	does not undertake collective bargaining on behalf of its members, except for the Charter, but gives advice and conciliation. No CAs have been signed by the organisation in 2003 and 2004, except the Charter.	ECEG CEFIC

*D : direct affiliation; I : indirect affiliation

Source: national reports

Note: Besides the information presented within the table, it is worth noting that unavailable data on members working in the sector per organisation are due to problems in evaluating the figures, which may occur, for example, if the delimitation of activities within the organisation which does not correspond to the national delimitation of the sector.

3. DESCRIPTION OF THE SOCIAL DIALOGUE IN THE SECTOR

3.1. European level¹⁹

At present, the European chemical industry employs around 2 million people and is the second largest industrial sector in Europe. In December 2004, the European Commission formally announced the establishment of an EU-level social dialogue committee in this sector. The social partners in the EU-level chemical industry are, as noted above, ECEG and EMCEF.

¹⁹ Source: <http://www.eiro.eurofound.ie>

3.2. National level

Social dialogue can be tripartite and/or bipartite. The first one is characterised by the involvement of the government and the social partners (workers' and employers' organisations) and the second one takes place between the latter, without intervention from the government. After a brief overview of the tripartite concertation and its existence in few countries, we will focus on the bipartite social dialogue at sector level in the chemical industry sector.

a) Description of the tripartite concertation in the sector

Basic features of tripartite concertation specifically for the chemical sector

Country	Existence	Basic features of tripartite concertation	Results
Austria	-	-	-
Belgium	-	-	-
Cyprus	X	two types: one in dealing with labour disputes and the other for administrative and regulatory disputes	signed agreements
Czech Republic	-	-	-
Denmark	-	-	-
Estonia	-	-	-
Finland	-	-	-
France	-	-	-
Germany	-	-	-
Greece	-	-	-
Hungary	-	-	-
Ireland	-	-	-
Italy	X	joint body: "special tripartite table for the chemical industry's recovery"	no collective agreements signed, but document and joint strategy do exist
Latvia	-	-	-
Lithuania	-	-	-
Luxembourg	-	-	-
Malta	-	-	-
Poland	X (in theory)	the tripartite consultation is seen more as a place for discussion than for real negotiation	-
Portugal	-	-	-
Slovakia	-	-	-
Slovenia	-	-	-

Spain	X	tripartite social concertation only happens occasionally and without a regular pattern	signed agreements
Sweden	-	-	-
The Netherlands	-	-	-
The United Kingdom	-	-	-

Source: national reports

Only four countries organise a tripartite concertation specifically for the chemical sector, even if in Poland, this is only from a theoretical point of view, and in Spain, it happens rather rarely. On the other hand, we note that in Italy, although a tripartite joint body does exist, this does not lead to signed agreements but to documents and joint strategy. In conclusion, a tripartite concertation effectively used and which generates signed agreements occurs only in Cyprus.

On the other hand, other kinds of consultation or meetings between the government and social partners may be held, as some countries do for example on the REACH (Registration, Evaluation and Authorisation of Chemicals) project.

b) Description of the bipartite social dialogue in the sector

Basic features of bipartite social dialogue by country (Source: national reports)

Country	Bipartite social dialogue at:			Collective agreements at sector level
	Sector level	Company level	Other	
				-
Austria	X	-	-	X
Belgium	X	X	-	X
Cyprus	X	X	Multi-employers	-
Czech Republic	X	X	-	X
Denmark	X	X	-	X
Estonia	-	X	-	-
Finland	X	-	local	X
France	X	X	-	X
Germany	-	X	National sector level and regional sector level	-
Greece	X	-	Occupational level	X
Hungary	X	X	-	X
Ireland	X	X	-	X
Italy	-	X	National level and regional/provincial level	-
Latvia	-	X	-	-
Lithuania	X	X	-	-
Luxembourg	-	X	-	-

Malta	-	X	-	-
Poland	X	X	-	-
Portugal	X	X	-	X
Slovakia	X	X	-	X
Slovenia	X	X	-	X
Spain	X	X	Provincial (or autonomous community) level	X
Sweden	X	-	-	X
The Netherlands	-	X	-	-
The United Kingdom	-	X	Site level	-

B. SUMMARY FOR BULGARIA, ROMANIA AND TURKEY

In **Bulgaria**, the sector is not among the biggest in terms of economic contributions, employment and number of companies (as compared to trade, construction, and textiles, for example) and its economic contribution tends to be in decline. There are, altogether, 3 representative social partners, who play a role in the CB in the sector (2 trade unions and one employers' organisation). According to the Bulgarian Labour Code the social partners are allowed to sign only one sector/branch agreement. In other words, consensus has to be achieved on one CA between 2 trade unions and one employers' chamber. However, for more than 8 years these players have not succeeded in signing any sector CAs, it is really an exceptional situation in the Bulgarian context. Company level is the only level of effective CB. The sector has a very high presence of MNCs - Solvay Group and Farmaco are among the biggest investors in Bulgaria- which provide, in fact, the best examples for good social dialogue not only at sectoral, but also at nation-wide level. Of course, the leading economic role of the MNCs influences the CB as well. Maybe this fact is one of the explanations for the lack of sector CAs, since the leading players conclude enterprise CAs.

During the period 1960-1990, the **Romanian** chemical industry experienced continuous development. This entailed a reduced number of large and very large firms (97 firms in 1990), a large number of employees (274,500 in 1990), all enterprises were state owned, enterprises were spread out uniformly throughout the country. After 1990, there were big changes in this sector, with a relatively large increase in the number of companies as new ones were set up (more than 3,200 of them), a gradual reduction of the number of employees, such that in 2003 there were only 40.0% of the employees in the sector compared to 1990 and the privatisation of companies. In Romania, the social partners are organised in the chemical and petrochemical sector, with this latter being defined, in the single collective agreement at national level, as one of the 32 branches for which a collective agreement had been signed at sector level. In the sector there is one representative employers' federation and a relatively small number of union federations, compared to other sectors. This is due to the fairly large number of small and micro enterprises. At sector level, one single collective agreement is concluded and one agreement at "higher than enterprise" level. Normally, collective agreements are signed for a period of 2-3 years or more. Every year, changes or amendments to the contract are negotiated (particularly in respect of wages or other entitlements). The social partners consider that, at sector level, tripartite dialogue is not working. Even if there are consultations with the government or with government representatives, the solutions proposed by the employers or by the unions are not taken very seriously. Bipartite social dialogue is more developed at sector level. The main concern is the improvement of competitiveness in the sector, in order to stand up to more and more aggressive competitors, so that positions in existing external markets may be maintained and new markets might be « conquered ». At enterprise level, only the large companies, where the union and the employers' organisation are affiliated to an association or to an employers' or union federation, are able to sign collective work agreements. In practice, the law which provides that the collective work agreement at sector level is applied to all employees in the sector (even if they were not represented in the negotiations), is not applied by the smaller companies, and the authorities do not check up on this.

Established in the early 1950s, the **Turkish** chemical sector, including petroleum and petrochemical has come to produce nearly 10% of the GDP and provide a quarter of a million jobs. Nevertheless, a dual structure, where technologically backward SMEs operate along with large local firms and MNCs, is the central feature of the Turkish chemical industry. This structure has profoundly affected industrial relations and collective bargaining in the chemical industry. Social partners are well established and institutionalised to a large extent. They have extensive links with both national and international trade union federation and confederations. There are three trade unions and three employer associations at sector level in the Turkish chemical industry. The actual rate of unionisation (not official) is currently low and has been decreasing over the last ten years. Both trade unions are at the critical stage in terms of union density in the chemical industry. If the actual figures are taken into account one of the trade union (Lastik-İş) may even lose its competency. In Turkey, no forms of social dialogue exist at sector level. Agreements can only take place at establishment and enterprise (multi-establishment) levels. An average 128 CAs signed annually and just about 17% of the workforce is covered by the CAs in the chemical industry. The ongoing privatisation of the large public companies tends to undercut both trade unions and CB in the sector. Social partners have enough legitimacy and competency to undertake sector level social dialogue as long as the rate of unionisation increases and the problems related to carrying out sector level social dialogue and CB derive from the severe economic crisis, privatisation and managerial assault, the decreasing rate of unionisation and the bleak prospects for the trade unions and social dialogue.