

UNIVERSITE CATHOLIQUE DE LOUVAIN

Institut des Sciences du Travail



**MONOGRAPHS ON THE SITUATION OF SOCIAL PARTNERS  
IN ACCEDING AND CANDIDATE COUNTRIES  
INTERSECTORAL LEVEL  
SUMMARY**

Project No VT/2002/0215

March 2004

Research project conducted on behalf of the Employment and Social Affairs Directorate-General  
of the European Commission

# SUMMARY

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

The aim of the report has been to produce monographs that set out both brief descriptions of the way that social dialogue functions in acceding and candidate countries, and descriptions of the various workers' and employers' organisations involved in social dialogue at national and intersectoral level in these countries.

## Background

This research is located against a backdrop of the European Commission's promotion of social dialogue at Community level, and in the setting of enlargement of the European Union.

The issue of the representativeness of European organisations came to the fore in the context of the promotion of social dialogue. In a Communication<sup>1</sup> in 1993, the European Commission set out three criteria determining the access of employers' associations and trade unions to the consultation process established under Article 3 of the Social Policy Agreement, and in 1996, it adopted a consultation document<sup>2</sup> 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 interprofessional and sectoral organisations in the European Union, and in a new Communication<sup>3</sup> in 1998, announced the measures that it proposed taking in order to adapt and promote social dialogue at EU 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. They were that the social partners should (1) *be related to specific sectors or categories and organised at European level; (2) consist of organisations which are themselves an integral and recognised part of Member States' social partner structures and with the capacity to negotiate agreements, and which are representative of several Member States; (3) have adequate resources to ensure their effective participation in the consultation process.* 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*<sup>4</sup>.

Against this background, it is clear that one of the main issues in the coming months, both for the Commission and for the European social partners, will be to prepare for 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*<sup>5</sup>. As far as the European Commission is concerned, *[o]nly with sufficiently robust national structures will*

---

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

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

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

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

<sup>5</sup> *Op cit.*

*the social partners be able to participate effectively in negotiations and other European social dialogue activities and also implement agreements at national level*<sup>6</sup>.

The development of social dialogue therefore forms part of the *acquis communautaire*: *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 EU 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 bipartite social dialogue is an important aspect for the future involvement of the candidates countries' social partners in the social dialogue activities developed at European and national level*<sup>7</sup>.

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 histories. The role played by collective bargaining is vastly inferior to the traditions of which we are aware, for example, in Germany, Sweden or Italy. In particular, social dialogue does not exist in all countries at a sectoral level*<sup>8</sup>. By and large, most of the country studies are notable for strongly developed tripartism, but weakness at central bipartite level, in social dialogue at sectoral level, and at the level of organisations, particularly employers' associations.

This study may be seen as a tool to help understand these quantitative and qualitative factors. It will also make it possible to understand the various systems of industrial relations in different countries, and to introduce the actors involved in social dialogue.

## The research process and methodological remarks

For the purposes of conducting this research, a network of university researchers was established for the 13 acceding and candidate countries. These researchers are independent both of the European Commission and of employers' and workers' organisations. Each researcher was tasked with producing a report on the basis of a common canvas, and a questionnaire dealing specifically with the realities of the acceding and candidate countries was drawn up for this purpose (see questionnaire in the Annex). The IST was responsible for coordinating and writing the summaries, and reaffirms its independence in respect of the political consequences and decisions that may flow from this study.

The research process that was developed involved not only the gathering of quantitative and qualitative information on the actors and the social dialogue in which they took part, but also *an active approach to constructing a consensus that forms an integral part of social dialogue itself*. For example, although the data collected do not in many cases make it possible to be wholly objective about the role played by organisations, the contacts that were made in the course of collecting the data and discussions with the various actors concerned will *form an integral part of a process of mutual recognition*<sup>9</sup>. It follows that the main sources used in the course of this study have been the social partners themselves.

In the same way, a process of consultation of the results of the study by the employers' and employees' confederations was organised. At the European level, the following organisations could consult the draft report and make comments about it: the Union of Industrial and Employers' Confederations of Europe (UNICE), the European Association of Craft, Small and

---

<sup>6</sup> *Op cit.*

<sup>7</sup> *Enlargement of the European Union. Guide to the negotiations. Chapter by chapter*, European Commission, DG Enlargement, June 2003.

<sup>8</sup> Léonard E., Spineux A., *Les relations industrielles en Europe aujourd'hui*, Institut des Sciences du Travail, UCL, 2003 (unpublished).

<sup>9</sup> *Reply to Call for tenders VT/2002/83. Studies on the representativeness of the social partners at sectoral 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.

Medium-sized Enterprises (UEAPME), the European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest (CEEP), the European Trade Union Confederation (ETUC), the Council of European professional and managerial staff (EUROCADRES) and the European Confederation of Executive and Managerial Staff (CEC). Their comments and reactions have been integrated as far as possible in the final report.

From the point of view of delimiting the scope of the research, three criteria were defined *a priori* with a view to identifying the organisations to be included:

- organisations that negotiate at intersectoral level;
- organisations that are members of recognised European organisations;
- emerging organisations that are not recognised, but which play roles at intersectoral level.

The aim of incorporating these three criteria was both to target the organisations *that play a role in social dialogue at intersectoral and national level* in each country, and to take account of the *evolving nature* of the various national situations.

Several methodological questions were raised on this point, and a number of choices were made, although some departed from previously established criteria in order to adapt to the national realities in each country.

- In particular, it is important to draw attention to the participation, or non-participation, of certain organisations that are members of European organisations, which are themselves recognised to take part in national social dialogue. Examples include Chambers of Commerce and Industry which, although often members of Eurochambers, sometimes play the role of social partners, and sometimes do not participate in processes of collective bargaining; the mandatory nature of their membership also raises questions as to their status. Some national members of organisations deemed representative at European level have therefore, when totally excluded from the field of social dialogue in their own countries, been placed outside the scope of the study. At national level, these organisations are special-interest associations and pressure groups.
- The main criterion used was an organisation's ability to sign collective agreements at national or intersectoral level. In several countries, it is true, no collective agreements are signed at national level at all, and confederated organisations are not empowered to sign such agreements, but that does not prevent these organisations from being recognised at national level and playing a role in social dialogue. They are "umbrella organisations" that coordinate the work of sectoral organisations negotiating at their level.
- With the national level of industrial relations in acceding and candidate countries characterised by the marked prevalence of tripartism (i.e. tripartite consultation or concertation with the public authorities), organisations that have signed tripartite agreements and/or which sit on formal tripartite bodies at national level have obviously been included as organisations recognised at national level.
- Moreover, in a process of research focusing on institutional representativeness<sup>10</sup>, it was important to question the representativeness criteria and the processes of recognising actors at national level in order to approach the various national realities as effectively as possible.

Lastly, 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 organisations in 2003. Interviews with organisations took place, and the national reports were written, between March and June 2003.

## Intersectoral monographs on candidate countries

The intersectoral monographs set out below examine the situations in the 13 acceding and candidate countries, that is to say Bulgaria, Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia and Turkey.

---

<sup>10</sup> It is worth pointing out here that it is not the aim of this study to examine all the factors affecting the recognition or legitimacy of employers' associations or trade unions. This legitimacy may be interpreted in many ways including the ability to mobilise the activist base, and results in social elections. See IST research reports under Project V/001/97.

After a short description of the macroeconomic situation (macroeconomic indicators) of each country and its labour market (the main indicators characterising the labour market), each national monograph sets out the main characteristics of the way that social dialogue functions. The following aspects of tripartism in these countries are examined:

- tripartite concertation structures (the setting up of these structures, and their missions);
- the actors that participate in tripartite concertation;
- the criteria for the recognition and/or representativeness of these actors at national level;
- the processes of decision-making/consultation that may be observed in these structures;
- the characteristics of the outcomes of these processes;
- the issues addressed by these tripartite structures.

Autonomous social dialogue (ie bipartism) is described under the following headings:

- What are the various levels of social dialogue?
- The characteristics of agreements concluded by the organisations (e.g. duration and extension procedures)
- The criteria of recognition and/or representativeness of the actors taking part in collective bargaining.
- The issues addressed in collective bargaining.
- The coverage rate of collective agreements.

All workers' and employers' organisations taking part in social dialogue at national and intersectoral level are then described under the following headings:

- institutional and organisational characteristics (legal status, decision-making process, historical overview, finance, means of information, and services);
- elements of representativeness (numbers of members represented, and types of membership);
- elements of the organisation's recognition (participation in tripartite structures, empowerment to sign collective agreements, and participation in social dialogue);
- affiliations to organisations representing employers and workers at European and international level.

## Tripartism

Generally speaking, tripartism plays a predominant role at national level in acceding and candidate countries. There are tripartite structures in all countries, and sometimes sectoral and regional tripartite structures have been put in place as well. In this context, the state is a central actor in industrial relations. In post-communist countries, tripartite structures were established in the 1990s, particularly following pressure from the ILO. They were a major element in fostering social peace during the period of transition, and may be consultative or capable of taking codecisions. It is sometimes felt that tripartite bodies are too formal and ineffective, and do not involve the social partners enough in decision-making processes

Tripartism was introduced into **Bulgaria** at the beginning of the transitional period on the initiative of the trade unions. Until 1994, the Bulgarian tripartite system was characterised by the fact that the employers' associations that took part were weak; the predominance of the state and the trade unions is still clear today. The tripartite system is both a consultative and a codecisional process: decisions reached in tripartite structures are not binding at bipartite negotiating levels, but the tripartite council is nonetheless a facilitator of bipartite social dialogue.

In **Cyprus**, tripartism was put in place following independence in 1960. A large number of tripartite organisations and bodies operate in the various Ministries: the most important, the Labour Advisory Board (*Ergatiko Simvouleftiko Swma*), is a consultative body that makes recommendations to the government, and publishes opinions on draft legislation. The tripartite system is well established in Cyprus. Trade unions and employers' associations in the Turkish part of the island do not take part.

In the **Czech Republic**, the tripartite process was introduced in 1990, its principal mission being to maintain social peace and prevent disputes during the period of transition. Tripartite concertation established, among other things, the structure of

bipartite collective bargaining at sectoral and company level. Consultation takes place between the social partners, and information is exchanged, on the tripartite council. There are also tripartite concertation structures in the regions.

The first tripartite agreement in **Estonia** was signed in 1992, and the state has so far played a major role in the tripartite process. However, the importance of the state in industrial relations is likely to diminish in the future. The aims of the tripartite process are not only consultation and the exchange of information, but also the negotiation of agreements. Strategic objectives for 2003 include the development of social dialogue at all levels. Compared with bipartite negotiation, the tripartite system in Estonia is well developed.

The first tripartite concertation forum in **Hungary** was established in 1988 by the final government prior to the democratic transition. The scope of tripartism was initially limited to the determination of salaries, but it was subsequently extended to include the formulation of social and economic policies and draft legislation. The main tripartite structure is an instrument of concertation, and then of consultation: in 2002, it became a body with consultative and codecisional powers that include the negotiating of agreements.

The aim of tripartite concertation in **Latvia** is to promote cooperation between the government, the employers and the trade unions with a view to resolving certain socio-economic problems. The main role of the tripartite council is to table proposals, and possibly objections, in the context of the preparation of draft laws. The social partners are extremely pleased with the way that the council operates.

The tripartite council in **Lithuania** was established in 1995; for the most part, it is a consultative body. Tripartite agreements were signed in 1995, 1999 and 2002. They have been binding since 2002, and therefore impact on the outcomes of bipartite negotiations. Lithuania also has regional tripartite structures.

A tripartite council was established in **Malta** in 1988. It is both a consultative body and a council, and deals with economic, budgetary and social policy. Discussions sometimes result in tripartite agreements. The council has played a major role in constructing consensual social dialogue.

The first tripartite commission was set up in **Poland** in 1993. It was felt to be formal and ineffective, and in 2001, was replaced by the Tripartite Commission for Socio-Economic Affairs, whose main objective is to contribute to social peace. The resolutions that the Commission takes are based on consensus, and they may or may not be binding. Tripartite structures have also been established at regional level.

The institutionalisation of tripartite concertation in **Romania** began in 1993. The various tripartite bodies are either consultative or codecisional: the aim of the most important body is to facilitate social dialogue between the government, the employers and the trade unions, and to maintain stability and social peace. Tripartite agreements have also been concluded outside the tripartite bodies: they normally apply to everyone, and act as a reference point for bipartite negotiations at all levels. Tripartite concertation also takes place at sectoral and regional level.

The tripartite concertation council in **Slovakia** was placed on a legal footing in 1999. It is a consultative body, and its decisions are not binding, although they apply to all. General Agreements concluded at tripartite level establish the general structure of collective bargaining.

Tripartite exchanges got off the ground in **Slovenia** in the early 1990s, and were institutionalised in 1994 with the setting up of a tripartite council. This council was involved in an easing of social and political tension in Slovenia during the period of transition. The social partners take part in the council's decision-making activities, often in the form of agreements that have the force of law. These agreements apply to the whole workforce.

The tripartite system has had little impact at national level in **Turkey**. The state and representatives of employers and workers sit on several tripartite and multipartite bodies, the most important of which in terms of social dialogue is the Economic and Social Council, which was established in 1995. The tripartite process in the Council is consultative, and is characterised by very large government representation.

## Autonomous social dialogue (bipartism)

Generally speaking, bipartite social dialogue is marked by weakness at national and sectoral level. The main negotiating level is company level, and bargaining is accordingly isolated and fragmented. There is also a certain resistance on the part of the employers to conclude collective agreements. The role of collective bargaining is therefore relatively limited, and the coverage rate is fairly low (estimated to be 25-30% on average).

**Bulgaria** has autonomous social dialogue at intersectoral, sectoral, branch (ie intersectoral) and company level. Leaving to one side the importance of tripartism, the main negotiating level is company level. Bipartite negotiations have only recently been introduced, and agreements concluded at this level (they have still not been signed) therefore concentrate on negotiating processes. The coverage rate of collective agreements in Bulgaria is about 17-19%.

Collective bargaining in **Cyprus** takes place at sectoral level and workplace level. The state is not completely excluded from the bipartite system, where it can play a mediating, and even an arbitrating, role when the parties are unable to reach an agreement. About 85% of the workforce are covered by sectoral and workplace-level collective agreements. The general climate of social dialogue is marked by consensual negotiations and few disputes.

Bipartite negotiations in the **Czech Republic** take place at sectoral level ("higher-level collective agreements"), and at regional and company level. There is no collective bargaining at intersectoral level. At sectoral, or "higher", level, social dialogue does not cover all sectors, and few agreements are concluded. About 20% of employees in the civil sector<sup>11</sup> were covered by a sectoral collective agreement in 2001: more workers are covered by agreements concluded at company level, but this figure is falling.

Collective agreements in **Estonia** may be concluded at national, sectoral and company level, although the national and sectoral levels are currently weak and are mostly ineffective. No agreements have been concluded at national level, and most sectoral agreements have been concluded in the state enterprises sector. Company-level agreements are normally applied to all employees in the enterprise, whether or not they are members of a signatory trade union.

Bipartite negotiation is underdeveloped in **Hungary**, the most developed level being the "workplace level". Concluded agreements apply to all workers in the enterprises covered. Agreements at sectoral level ("multi-employer level") do not cover the whole of a sector, but mainly enterprises that are organised and already covered by company-level agreements.

The role of the social partners at intersectoral level in **Latvia** is mainly limited to tripartite concertation, and the organisations admit that they have little experience in bipartite collective bargaining. The main level of bipartite negotiation is company level, with a few exceptions at sectoral and municipal in some sectors. Under 20% of the workforce were covered by collective agreements in 1999.

Collective agreements in **Lithuania** may be concluded at branch, regional and company level. At national level, discussions between the social partners are mainly restricted to the tripartite process, and no agreements have been concluded under the bipartite umbrella. The sectoral level is also rather weak, with the employers very poorly organised. The most important level of negotiation is company level, but outcomes are still relatively modest in the private sector. They are more favourable in the public enterprise sector.

Bipartite social dialogue in **Malta** takes place almost exclusively at company level. Concluded agreements cover all employees of the enterprise concerned. There is a huge divergence between collective agreement coverage in the public and private sectors: union density is very high in the public sector (90%) and nearly all workers are covered by collective agreements, but only about a third of private-sector employees are covered. Social dialogue is particularly weakly developed in SMEs.

Collective bargaining in **Poland** mostly takes place at company level, particularly in the industrial sector, and at supra-enterprise level, which is more characteristic of negotiations in the public sector. Although a lot of work has gone into

---

<sup>11</sup> The civil sector does not include the army and soldiers. The civil sector has been chosen to calculate the coverage rate because soldiers are not allowed to form trade unions.

improving and organising social dialogue in Poland, collective bargaining practices are still quite weak, and employers at company level tend to avoid signing collective agreements.

Bipartite social dialogue in **Romania** takes place at national, sectoral and company level and, depending on the level of bargaining, negotiated agreements apply to all workers in the enterprise, sector or country concerned. The various levels of negotiation are interlinked, with provisions at national level binding on sectoral-level negotiations, and sectoral provisions binding on company-level bargaining. Not all sectors are covered by collective agreements, or "collective work contracts"; the coverage rate is about 60%. This rate is felt to be under-developed. "Collective labour contracts" at company level normally have to be signed annually in all enterprises employing at least 21 workers. Small enterprises are therefore exempt from this obligation.

Social dialogue in **Slovakia** takes place at sectoral level ("higher-level collective agreements") and company level. These agreements have the force of law. Company-level agreements are applied to members of signatory organisations, but they may be extended by the Ministry of Labour, Social Affairs and the Family to other enterprises in the same sector.

Tripartism in **Slovenia** constitutes the mandatory basis for bipartite negotiations at national, sectoral and company level. There is a hierarchical connection between the levels. Two collective agreements are signed at national level, one for the private sector, and other for the public sector, and almost entire workforce is therefore covered by at least one national agreement. Agreements have been signed in 28 branches of the private sector, and in terms of content, they are more or less developed in the sectors of activity. Collective bargaining is fairly limited at company level: most collective agreements are signed with large enterprises; in SMEs, they are replaced by unilateral rules known as "unilateral statutes".

Collective bargaining in **Turkey** takes place at sectoral level and "workplace level". No collective agreements have been signed at national level. Most agreements in the public sector are of a sectoral variety ("multi-plant" and "multi-employer" agreements), but the most important bargaining level in the private sector is the workplace level. Concluded agreements only cover union members and non-union members who pay a "solidarity due". The public sector state employs about 40% of the workforce, and 70% of unionised workers, and the state therefore plays a central role in bipartite social dialogue in Turkey as an employer.

## Organisations of workers and employers

Some general statements may be made about post-communist countries. On the trade union side, there are historically two kinds of structure: unions that were set up on the basis of communist trade union organisations, and unions that were re-established again during the years of transition. The 1990s were characterised by a marked decline in union density. Social dialogue is sometimes dominated by a large union, and sometimes there is a pluralist constellation of union structures, or even widespread fragmentation of workers' representation. Generally speaking, trade unions represent all workers in collective bargaining, and not just their own members. On the employers' side, the historically legitimate actors are Chambers of Commerce and Industry: sometimes they participate in social dialogue, and sometimes they are special-interest associations. Employers' associations are a recent development: they were founded in the 1990s, mainly when the tripartite structures were being put in place. They are sometimes poorly organised at sectoral level.

Union density in **Bulgaria** stands at about 28-29%, and membership is falling. At national, sectoral and branch (sub-sectoral) level, two trade unions are empowered to negotiate and conclude collective agreements. It should be noted that a process of verifying the representativeness of trade unions will be taking place at the end of 2003. This exercise was first conducted in 1998-1999. Four employers' associations are currently recognised by the government as representative organisations: one of them, the Bulgarian Industrial Association (BIA), is particularly representative in terms of enterprises and workers represented.

At the end of 2000, 123 trade unions were listed on the official register of the **Cyprus** Ministry of Labour and Social Insurance. At national level, these organisations are grouped into five national confederations; in addition, there are the Turkish Cypriot union confederations. Union density in Cyprus is between 67% and 70%. At the end of 2000, there were 35 employers' associations listed on the official register. The Employers' and Industrialists' Federation (OEB) is the umbrella

body for the main associations as well as some individual enterprises. The Chamber of Commerce and Industry also represents enterprises and staff associations.

There has also been a net fall in union density in the **Czech Republic** since the early 1990s, although trade unions still retain a degree of influence in terms of material and human resources. There are three trade union confederations in the Czech Republic, and two of them take part in tripartite concertation. Employers' associations may not have declined particularly in terms of membership over the years, but they are still marked by organisational weaknesses. National "umbrella" organisations do not conclude collective agreements, but instead concentrate on tripartite activities, and the coordination of, and support for, social dialogue at lower levels.

Union density in **Estonia** is low (14% in 2002), and has been falling since the beginning of the period of transition. Two trade union confederations are recognised as social partners at national level: the Confederation of Estonian Trade Unions (EAKL) and the Estonian Employees' Unions' Confederation (TALO). Only one employers' association, the Estonian Employers' Confederation (ETTK), takes part in social dialogue at national level; it represents about 25% of total employment in the country, and 35% of workers in the private sector.

**Hungary** is notable for considerable trade union pluralism. New structures have been formed, and the communist trade union (SZOT) has been reformed and broken up into several organisations. The employers' side, too, is marked by considerable fragmentation with nine organisations each having a seat on the tripartite council. Employers' associations are more defined as representatives of economic interests than as partners in social dialogue.

There is only trade union that represents workers at national level in **Latvia**: the Free Trade Union Federation of Latvia (LBAS), but it only represents a small number of workers (16% of the total workforce, and 90% of unionised workers); 70% of the members work in the public sector. The only confederation of employers at intersectoral level is the Confederation of Latvian Employers: it represents enterprises that employ 35% of the workforce.

Three trade unions are recognised at national level in **Lithuania**. Union density is an estimated 13% of the total workforce. Two confederations of employers take part in social dialogue at national level; there are also regional intersectoral employers' associations.

Union density stood at around 60% in **Malta** in 2002: 96% of unionised workers belong to three main trade unions, and these three organisations sit on the tripartite council. Malta has 25 employers' associations representing 9233 enterprises: three of these associations and the Chamber of Commerce and the Federation of Industries take part in the tripartite process.

About 250 trade unions are officially registered in **Poland**; most of them are local unions. The 1990s were marked by a decline in union density, and trade unions have few members in SMEs, and virtually none in the commerce and services sectors. The trade unions at national level are NSZZ Solidarnosc, the All-Poland Alliance of Trade Unions, and a new organisation, the Forum of Trade Unions. Four national employers' associations meet the representativeness criteria: they concentrate more on lobbying than on their work in the field of social dialogue.

Five trade unions are recognised at national level in **Romania**. The trade unions estimate union density to be 55-560%. Employers' organisations are characterised by significant fragmentation.

Union density in **Slovakia** stands at about 40%, and there are about 40 trade unions: most of them are affiliated to the Confederation of Trade Unions of the Slovak Republic, which was established in 1990. Other intersectoral organisations exist, but they represent a much smaller number of workers. The formation of structures representing employers in Slovakia commenced in 1991: these organisations have now stabilised and are going through a process of growth. Most are affiliated to the Federation of Employers' Associations of the Slovak Republic.

Union density in **Slovenia** is approximately 40% and falling. It was 60% in 1999. About half of all unionised workers belong to the main trade union, the Confederation of Slovenian Free Trade Unions (ZSSS); three other organisations take part in tripartite concertation. Five employers' associations, including the Chamber of Commerce and Industry and the Chamber of Craftworkers, take part in the tripartite system and in bipartite social dialogue. Membership of these Chambers is compulsory.

Union density in **Turkey** stands at about 10% of the workforce. Workers in Turkey are represented by three main trade union confederations: of these, **Türk-İş** with almost 2 million members, is the most important. Three other trade unions represent public sector employees. On the employers' side, a range of bodies such as chambers, employers' organisations and employers' associations enjoy different legal status. The confederations are not empowered to sign collective agreements at national level.