



Developments in social partner organisations – employer organisations

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This report is available in electronic format only.

This report examines the structure and role of employer organisations in the European Union and Norway, highlighting recent trends and developments. The report focuses mainly on national ‘peak’ employer organisations and sectoral organisations, their role in collective bargaining and tripartite/bipartite dialogue, and the services they provide to members. Other areas examined include subnational (regional or provincial) employer organisations, organisations that group employers with shared characteristics or interests, and the composition of the leadership of employer bodies.

Introduction

This report examines the structure and role of [employer organisations](#) in the Member States of the European Union (apart from France) and Norway, and looks at recent developments in this area, especially since 2003, when the [European Industrial Relations Observatory \(EIRO\)](#) last conducted a comparative study on the subject ([TN0311101S](#)). It is based on questionnaire responses from the [EIRO national centres](#), with the exception of the French centre, which did not contribute to the study.

For the purposes of this study, employer organisations are defined as bodies that represent employers’ collective interests in relation to the labour market and industrial relations. They may be ‘pure’ employer organisations, which solely represent labour market/industrial relations interests, or ‘dual’ organisations, which represent both labour market/industrial relations interests and other business interests – that is, acting as trade associations in relation to product or service markets. In the context of this report, an organisation is considered an employer organisation, in the strict sense, if it meets at least one of the following three criteria:

- it is able and willing to negotiate [collective agreements](#), directly or indirectly;
- it is involved in bipartite and/or tripartite consultations on labour market and industrial relations regulation;
- it has a special department dealing with such issues.

The study focuses mainly on national ‘peak’ employer organisations, along with sectoral organisations and, where significant in a particular country, organisations representing employers in a specific subnational geographical area. It also looks at organisations that group employers on lines other than sector or geographical area – for example, representing specific types of company, such as small and medium-sized enterprises (SMEs) or cooperatives, or employers with some other common feature.

The report focuses mainly on the private sector, rather than organisations representing the public sector and the state as an employer. However, it covers relevant organisations representing providers of ‘services of general interest’, which may be publicly or privately owned.

Peak organisations

National ‘peak’ employer organisations (NPEOs) are defined broadly here as organisations that are not affiliated to any higher-level body, have national scope and organise employers in more than one economic sector. Table 1 lists all of the organisations identified as being NPEOs for the purposes of this study.

In many countries, identifying NPEOs is a relatively straightforward task. However, in others the situation is less clear. Notably, in some countries organisations that do not correspond to the definition used in this report are treated in practice as NPEOs – for example, through involvement in national cross-industry tripartite and/or bipartite arrangements. For instance, in Belgium the Union of Small Firms and Traders ([Union des classes moyennes, UCM](#)) and the Union of Independent Entrepreneurs ([Unie van Zelfstandige Ondernemers, UNIZO](#)) are regional rather than national bodies, representing SMEs in Flanders and Wallonia respectively. Nevertheless, they are included in this list of NPEOs because they participate in national cross-industry consultative and bargaining arrangements, and in light of Belgium’s highly devolved nature and the absence of a national SME organisation.

The criterion that NPEOs should organise in more than one sector can also raise questions. There are cases in which essentially single-sector bodies are treated as NPEOs in practice, largely because cross-industry organisations do not cover, or cover only to a limited extent, the sector that they represent, such as agriculture, finance or tourism. These bodies are included in the list of NPEOs where they play a clear role in national cross-industry tripartite and/or bipartite arrangements. Examples include the following: the Confederation of Farmers of Portugal ([Confederação dos Agricultores de Portugal, CAP](#)) and the Confederation of Portuguese Tourism ([Confederação do Turismo Português, CTP](#)) in Portugal; the Danish Employers’ Association for the Financial Sector ([Finansektorens Arbejdsgiverforening, FA](#)) and the Danish Confederation of Employers’ Associations in Agriculture ([Sammenslutningen af Landbrugets Arbejdsgiverorganisationer, SALA](#)) in Denmark; the National Confederation of Hellenic Commerce ([Εθνική Συνομοσπονδία Ελληνικού Εμπορίου, ESEE](#)) in Greece; the Confederation of Italian Farmers ([Confederazione Italiana Agricoltori, CIA](#)), the National Confederation of Farmers ([Confederazione Nazionale Coltivatori Diretti, Coldiretti](#)) and the General Confederation of Italian Agriculture ([Confederazione Generale dell’Agricoltura Italiana, Confagricoltura](#)) in Italy; and the Dutch Federation of Agriculture and Horticulture ([Land en Tuinbouworganisatie-Nederland, LTO-Nederland](#)) in the Netherlands.

A further issue relates to the criterion that NPEOs should not be affiliated to any higher-level body. In the cases of Ireland and Spain, national cross-industry bodies representing SMEs – the [Small Firms’ Association \(SFA\)](#) and the Spanish Confederation of Small and Medium-sized Enterprises ([Confederación Española de la Pequeña y Mediana Empresa, CEPYME](#)) respectively – are affiliated to general employer confederations, namely the [Irish Business and Employers’ Confederation \(IBEC\)](#) and the Spanish Confederation of Employers’ Organisations ([Confederación Española de Organizaciones Empresariales, CEOE](#)); in practice, however, they have considerable independence and participate in their own right in national cross-industry tripartite and/or bipartite arrangements. They are thus included in this list.

Judgments have also been made, in some cases, over whether some peak organisations act as employer associations, in line with the definition used in this study. For example, the Federation of German Industries ([Bundesverband der Deutschen Industrie, BDI](#)) and the German Chambers of Industry and Commerce ([Deutscher Industrie- und Handelskammertag, DIHK](#)) are often involved in bipartite, tripartite or multilateral consultations on labour market issues, but are not included here as they are essentially trade associations and exist alongside bodies with an explicit

employer organisation role – for example, the German Confederation of Employers' Associations ([Bundesvereinigung der Deutschen Arbeitgeberverbände, BDA](#)) and the German Confederation of Skilled Crafts ([Zentralverband des Deutschen Handwerks, ZDH](#)). Chambers of commerce, industry and services are included only where they are involved in **collective bargaining** or have some other clear industrial relations role, as in Bulgaria, Cyprus, Ireland, Malta and Slovenia.

Almost all NPEOs in the countries examined are 'dual' organisations, which represent both labour market/industrial relations interests and other business interests. There are few 'pure' employer organisations, which solely represent labour market/industrial relations interests: the exceptions include BDA in Germany, the [Malta Employers' Association \(MEA\)](#), and the Slovenian Employers' Association ([Združenje delodajalcev Slovenije, ZDS](#)) and the Slovenian Employers' Association of Crafts ([Združenje delodajalcev obrtnih dejavnosti Slovenije, ZDODS](#)).

Table 1: Overview of national peak employer organisations in the EU and Norway

Country	General, cross-industry	Specific employer type*			Specific sector*
		SMEs	Crafts	Other	
AT (2)	WKÖ				IV
BE (4)	FEB/VBO	UCM, UNIZO		UNISOC (for-profit social enterprises)	
BG (6)	BCCI, BIA	UPBE, UPEE		CEIBG (large and medium-sized enterprises), BICA (publicly-owned)	
CY (2)	KEBE, OEB				
CZ (2)	KZPS, SP ČR				
DE (2)	BDA		ZDH		
DK (3)	DA				FA (finance), SALA (agriculture)
EE (1)	ETTK				
EL (3)	SEV	GSEVEE			ESEE (commerce)
ES (2)	CEOE	CEPYME			
FI (1)	EK				
HU (9)	MGYOSZ, VOSZ	IPOSZ, KISOSZ	IPOSZ, OKISZ	MOSZ, OKISZ and ÁFEOSZ (all cooperatives), STRATOSZ (public utilities)	AMSZ (agriculture), MOSZ (agriculture), KISOSZ (commerce), ÁFEOSZ

					(commerce, agriculture, food)
IE (4)	CI, IBEC	ISME, SFA			
IT (14)	Confindustria	Confapi, Confesercenti	CLAAI, CNA, Confartigianato	AGCI, Confcooperative, Legacoop and UNCI (all cooperatives)	CIA, Coldiretti and Confagricoltura (all agriculture), Confcommercio and Confesercenti (both commerce, tourism, services), Confapi (manufacturing)
LT (2)	LPK, LVDK				
LU (1)	UEL				
LV (1)	LDDK				
MT (3)	MCCEI, MEA	GRTU			
NL (3)	VNO-NCW	MKB-Nederland			LTO-Nederland (agriculture)
NO (2)	NHO				HSH (private services)
PL (5)	BCC, KP, KPP, PKPP	ZRP	ZRP		
PT (4)					CAP (agriculture), CCP (commerce and services), CIP (manufacturing and services), CTP (tourism)
RO (13)	CNPR, CP CONCORDIA, CONPIROM, CoNPR, CPISC, PNR, PR, UGIR, UGIR 1903, UNPCPR, UNPR	CNIPMMR		CNIPMMR (cooperatives)	ARACO (construction and building materials)
SE (8)	SN	SAO-		Arbetsgivaralliansen	

		Småföretagarna, Sinf		(non-profit), Idea (non-profit and voluntary), KFO (cooperatives and non-profit), KFS and Pacta (both municipality-linked companies)	
SI (5)	GZS, ZDS	OZS, ZDODS	OZS, ZDODS		TZS (trade/commerce – formally cross-industry)
SK (2)	AZZZ SR, RUZ SR				
UK (1)	CBI				

Notes: See Annex for full names of organisations.

** Some NPEOs (in HU, IT, PL, RO and SI) are listed more than once because they: organise more than one specific type of employer, for example both SMEs and crafts; or organise specific type(s) of employer in a specific sector/group of sectors, for instance SMEs in commerce.*

Source: EIRO national centres, questionnaire responses, 2009

Structure

The structure of peak-level employer representation varies enormously between countries, encompassing single peak organisations and multiple peak organisations.

Single peak organisations

The simplest structure is that found in Estonia, Finland, Latvia, Luxembourg and the United Kingdom (UK), where there is essentially a single NPEO – that is, both general in that it seeks to represent companies of all size and types, and cross-industry in that it seeks to represent all sectors of the economy (or at least the private sector economy). In several of these countries, the situation is somewhat more complicated in practice. For example, in Finland, church and agricultural employers have separate organisations, both of which conduct collective bargaining, while the Federation of Finnish Enterprises ([Suomen Yrittäjät](#), [SY](#)), which represents mainly SMEs, takes an interest in employment matters, without being involved in bargaining or fully meeting the definition of an employer organisation used in this report. In the UK, there are other organisations representing business interests, both general and those of SMEs, but again without fully meeting the definition used here.

Multiple peak organisations

In all other countries, there are multiple NPEOs, varying from two in Austria, Cyprus, the Czech Republic, Germany, Lithuania, Norway and Slovakia to 13 in Romania and 14 in Italy. The NPEOs within a country may represent different membership domains – in terms of size or type of company or of sector – or may compete (at least potentially) within the same membership domain.

In four of these countries, all NPEOs are general and cross-industry, seeking to represent all types of company across the economy. This is the case in Cyprus, the Czech Republic, Slovakia and (formally at least) Lithuania. In the other 18 countries with multiple NPEOs, general cross-industry organisations co-exist with peak associations for particular sectors or groups of sectors and/or for particular company types (see section below on ‘Employer type’).

The sectoral dimension is most important in Norway and Portugal. Sectoral peak organisations are also present in Denmark, Greece, Hungary, Italy, the Netherlands, Romania and Slovenia. In Austria, while one of the peak organisations, namely the Austrian Federal Economic Chamber ([Wirtschaftskammer Österreich, WKÖ](#)), is cross-industry and the other, namely the Federation of Austrian Industry ([Industriellenvereinigung, IV](#)), covers the broadly defined industrial sector, the most important distinction between them is that WKÖ is a statutory body of which membership is compulsory for companies, while IV is a voluntary organisation.

With regard to cross-industry NPEOs covering particular types of company, these most commonly represent SMEs and/or crafts enterprises: at least one specific SME or crafts organisation is present in 14 countries. Other company categories represented by specific NPEOs include cooperatives in Hungary, Italy and Sweden.

In the 18 countries where general cross-industry organisations co-exist with peak associations for particular types of company (and sectoral peak organisations in some cases), the overall structure of peak-level employer representation is relatively straightforward in cases where only one NPEO seeks to represent each membership domain. In countries with both general NPEOs and SME NPEOs, the former’s membership domain usually includes SMEs but in practice it generally appears to be accepted that many SMEs are represented by the latter. The situation is probably simplest, and least potentially competitive, in Belgium, Denmark, Germany, Greece, the Netherlands and Spain.

In the remaining countries, there are two or more NPEOs seeking to represent at least one membership domain. The situation is probably most complicated – with multiple NPEOs in some membership domains (for example 11 general cross-industry NPEOs in Romania) – in Bulgaria, Hungary, Italy, Poland, Romania and Slovenia.

Recent structural changes

The overall structure of peak-level employer representation has remained stable over the past decade or so in most countries examined. In the countries that have seen change, this has mainly involved mergers and consolidation, usually with the aim of strengthening employers’ collective voice (towards government and trade unions) and, in some instances, avoiding duplication or reflecting changes in the structure of the economy. In the original 15 EU Member States prior to enlargement in 2004 and 2007 (EU15), the main case of consolidation since 2003 involved the creation of a general cross-industry NPEO from associations with narrower membership domains. This concerned the establishment of the Confederation of Finnish Industries ([Elinkeinoelämän keskusliitto, EK](#)) in 2005 through the merger of the Confederation of Finnish Industry and Employers ([Teollisuuden ja Työnantajain Keskusliitto, TT](#)), which mainly represented industry and construction, and the Employers’ Federation of Service Industries ([Palvelutyönantajat, PT](#)), which represented services companies.

Among the post-2004 new Member States, consolidation between narrower bodies to create a general cross-industry NPEO has occurred in Malta, where in 2008 the [Malta Chamber of Commerce and Enterprise \(COC\)](#) and the [Malta Federation of Industry \(FOI\)](#), which largely represented manufacturing, merged to form the [Malta Chamber of Commerce, Enterprise and Industry \(MCCEI\)](#) – the decline of FOI’s industrial membership base was a factor in the merger decision. However, in the central and east European new Member States (CEECs), where

employer organisations have existed for only two decades, the direction of change has been less clear-cut, and the structure of representation is still in a state of development in some countries. While consolidation is occurring, there are also cases of new NPEOs being created, or existing bodies splitting, as the following examples demonstrate:

- the Bulgarian International Business Association ([Българска асоциация на международния бизнес](#), BIBA), representing the Bulgarian operations of multinational companies, merged in 2006 with the Employers' Association in Bulgaria ([Асоциация на работодателите в България](#), EABG), representing many larger employers, to create the Confederation of Employers and Industrialists in Bulgaria ([Конфедерация на работодателите и индустриалците в България](#), CEIBG);
- in Poland, a new general, cross-industry NPEO, the Confederation of Employers 'Lewiatan' ([Konfederacja Pracodawców 'Lewiatan'](#), [KP Lewiatan](#)), was established in 2004, stemming from the Polish Chamber of Commerce ([Krajowa Izba Gospodarcza](#), [KIG](#));
- in Romania, the number of peak organisations has continued to grow, with the Employers' Confederation for Industry, Services and Commerce ([Confederația Patronala a Industriei, Serviciilor și a Comerțului](#), [CPISC](#)) established in 2003 and the Concordia Employers' Confederation ([Confederația Patronală Concordia](#), [CP Concordia](#)) founded in 2007, although one such organisation has disappeared recently ([Confederația VITAL](#), Vital Confederation). However, there has also been movement towards greater consolidation. Nine peak organisations, along with four business associations, have joined an umbrella body, the Alliance of Employer Confederations in Romania ([Alianța Confederațiilor Patronale din România](#), [ACPR](#)), formed in 2006. ACPR does not function as an NPEO at present;
- a new general NPEO was created in Slovenia in 2006 – namely, the Slovenian Chamber of Commerce ([Trgovinska zbornica Slovenije](#), [TZZ](#)), which is formally cross-industry but in practice represents the trade/commerce sector;
- Slovakia's sole NPEO, the general cross-industry Federation of Employers' Associations ([Asociácia zamestnávateľských zväzov a združení Slovenskej republiky](#), [AZZZ SR](#)), split in 2004, with around half of the members leaving to form another general cross-industry body, the National Union of Employers ([Republiková únia zamestnávateľov Slovenskej republiky](#), [RUZ SR](#)). The reason for the split appears to have been differences of opinion about AZZZ SR's management and how best to represent employers' interests.

Short of a merger, recent years have seen increasing cooperation between Lithuania's two NPEOs – the Lithuanian Confederation of Industrialists ([Lietuvos pramoninkų konfederacija](#), [LPK](#)) and the Lithuanian Business Employers' Confederation ([Lietuvos verslo darbdavių konfederacija](#), [LVDK](#)) – with the aim of greater consolidation of representation and coordination of action.

Membership

The membership of NPEOs may be made up of lower-level employer organisations, either sectoral or territorial (such as regional or local), companies or individual employers, or both. The most common pattern is that NPEOs' members comprise both lower-level associations and companies. This applies in around four out of 10 cases. A little over a third of NPEOs have only lower-level associations as members, while about a quarter have only individual companies as members.

Employer organisation density

This report does not attempt to assess the overall [representativeness](#) of employer organisations, in terms of the proportion of all companies they represent, or the share of the total national workforce employed by these companies. This is an area where reliable figures are hard to come by, especially data that are comparable between countries. Furthermore, in countries with multiple NPEOs, it is sometimes the case that their membership overlaps, with the same companies affiliated to several organisations, directly or through membership of lower-level associations. Studies on sectoral representativeness of the social partners have regularly been conducted by the [European Foundation for the Improvement of Living and Working Conditions \(Eurofound\)](#).

However, it is clear that employer organisation ‘density’ varies considerably between countries. Compulsory membership of [WKÖ](#) (except for agriculture and the liberal professions) means that density is virtually 100% in Austria. According to the [European Commission’s Industrial relations in Europe 2008](#) report, in 2006 overall density was as follows: over 80% in the Netherlands; 70%–80% in France, Luxembourg, Belgium, Spain, Finland and Greece; 60%–70% in Germany and Malta; 50%–60% in Portugal, Cyprus, Sweden, Denmark and Italy; 30%–40% in the UK, Hungary, Slovenia and the Czech Republic; and 20%–30% in Estonia, Latvia, Lithuania and Poland. Density levels are generally lower in the CEECs than elsewhere, although Bulgaria and Romania (not included in the Commission research) appear to have comparatively high densities according to the data provided by the EIRO national centres.

Recent changes

In terms of the overall number of employers that NPEOs represent, most countries have experienced little significant change over recent years and the overall picture is one of considerable stability. The exceptions include a rising trend in membership in Bulgaria, which may be attributed to factors such as economic restructuring (notably privatisation and increased foreign investment) and an increasing capacity of employer organisations, in terms of participating in [social dialogue](#) and providing services to members. Membership has also been increasing in Latvia, where the sole NPEO has grown strongly since 2004. By contrast, the clearest case of declining overall membership is Slovenia, where the traditionally high density has been falling sharply. An important factor was the abolition of compulsory membership of the Chamber of Commerce and Industry of Slovenia ([Gospodarska zbornica Slovenije, GZS](#)) in 2006. In 2009, GZS had only a fifth of the number of member companies that it did in 2004. The Slovenian Employers’ Association ([Združenje delodajalcev Slovenije, ZDS](#)), the other general cross-industry NPEO, has increased its company membership since 2003 (following a decline in the period 1994–2003) but represents a diminishing proportion of the private sector workforce, partly because the number of large member companies is declining. However, [TZS](#), which was formed in 2006 as a representative organisation for the commerce sector, has grown rapidly since its creation.

In several countries, such as Lithuania and Slovenia, bankruptcies and liquidations resulting from the current economic crisis have been a factor in reducing the number of companies affiliated to NPEOs since 2008.

The Confederation of Italian Industry ([Confederazione Generale dell’Industria Italiana, Confindustria](#)), Italy’s largest and most influential NPEO, has significantly widened its membership from its traditional manufacturing base to growing service sectors, such as business services, tourism and private healthcare, reflecting changes in the structure of the economy. At

the same time, it has also recruited important publicly-owned, or formerly publicly-owned, companies.

In Malta, NPEOs are experiencing differing fortunes. The [Malta Chamber of Small and Medium Enterprises \(GRTU\)](#) and especially the MEA have been growing. In contrast, MCCEI is probably losing members, although official figures are not available, not least because of a steep decline in the manufacturing industry.

The number of lower-level employer organisations affiliated to NPEOs is likely to vary over time for reasons such as the formation of associations in new sectors, the merger of existing organisations or the disappearance of associations, for example in dwindling sectors. Beyond these ‘natural’ developments, there have been few significant changes in the number of lower-level affiliates affiliated to NPEOS in recent years.

The Confederation of Danish Employers ([Dansk Arbejdsgiverforening, DA](#)) in Denmark has perhaps been the NPEO most affected by mergers of lower-level affiliates – a process reflected among their trade union counterparts – with the number falling from 157 affiliates in the 1980s to 13 today. This has had the effect of creating a dominant affiliate, namely the Confederation of Danish Industries ([Dansk Industri, DI](#)), which represents over 60% of the total payroll of DA-represented companies. Largely at DI’s behest, DA has restructured to become a slimmer organisation with a reduced role.

In several countries, there has been a degree of flux in the affiliation of lower-level employer organisations, with associations switching between NPEOs (as has happened quite extensively in Romania) or becoming independent. This has mainly occurred in a number of CEECs, where employers’ representational structures have not yet settled into a stable pattern. For example, in the Czech Republic, some lower-level organisations have changed affiliation, while the Czech Confederation of Commerce and Tourism ([Svaz obchodu a cestovního ruchu ČR, SOCR ČR](#)) has disaffiliated from the Confederation of Employers’ and Entrepreneurs’ Associations of the Czech Republic ([Konfederace zaměstnavatelských a podnikatelských svazů ČR, KZPS](#)) and is now independent. In Slovakia, following the split between AZZZ SR and RUZ SR in 2004, the Association of Employers of Transport, Post Offices and Telecommunications ([Zväz zamestnávateľov dopravy, pôšt a telekomunikácií, ZZDPT](#)) left RUZ SR and renamed itself the Union of Transport, Post and Telecommunications ([Únia dopravy, pôšt a telekomunikácií, UDPT SR](#)). Following an unsuccessful attempt to establish itself as an NPEO in its own right, UDPT SR became affiliated to AZZZ SR in 2008. In the same year, one of the biggest and most influential private sector employer organisations, the Slovak Industry Association ([Zväz priemyslu Slovenska, ZPS](#)), left RUZ SR and is now independent. Similarly, in 2007, the Portuguese Federation of Construction Industry and Public Works ([Federação Portuguesa da Indústria da Construção e Obras Públicas, FEPICOP](#)), one of the largest affiliates, left the Confederation of Portuguese Industry ([Confederação da Indústria Portuguesa, CIP](#)).

Role of NPEOs

Collective bargaining

In 17 countries, NPEOs engage in direct negotiations with trade union confederations over cross-industry agreements regulating at least some aspects of employment conditions, or have done so at least once over the 2003–2009 period. These agreements take two basic forms:

- regular, for example annual or two-yearly, general accords setting pay increases and other general employment terms, or laying down guidelines or minima in these areas to be observed by lower-level bargainers;
- agreements on specific employment-related issues, generally of a ‘one-off’ nature, but in a few cases more regular.

Regular intersectoral agreements on general pay and conditions are concluded by NPEOs in: Belgium (the Federation of Enterprises in Belgium ([Fédération des Entreprises de Belgique/Verbond van Belgische Ondernemingen, FEB/VBO](#)), UCM and UNIZO); Bulgaria (all peak associations, but only once, in 2007); Finland (EK until 2007); Greece (all peak associations); Ireland ([Chambers Ireland \(CI\)](#), IBEC and SFA); Norway (all peak associations); Romania (all peak associations except CP Concordia and the National Union of Romanian Employers ([Uniunea Națională a Patronatului Român, UNPR](#))); Slovenia (GZS, ZDS, ZDODS and, until 2009, the Chamber of Craft and Small Businesses of Slovenia ([Obrtno-podjetniška zbornica Slovenije, OZS](#))); and Spain (all peak associations). In Hungary, all NPEOs are involved in annual tripartite talks on minimum wage increases and recommendations for private sector pay bargaining.

Agreements on specific employment-related issues – such as training, stress, telework, social security or industrial relations procedures – are concluded by NPEOs in: Belgium (FEB/VBO, UCM and UNIZO); Cyprus (all peak associations); Denmark (DA and SALA); Estonia (the Estonian Employers’ Confederation ([Eesti Töandjate Keskliit, ETTK](#))); Italy (all peak associations); Luxembourg (the Union of Luxembourg Companies ([Union des Entreprises Luxembourgeoises, UEL](#))); Norway (all peak associations); Portugal (all peak associations); Spain (all peak associations); and Sweden (the Confederation of Swedish Enterprise, ([Svenskt Näringsliv, SN](#))).

In some of these countries, and in a number of others, NPEOs may engage in bipartite talks with trade union confederations that lead to joint texts that are not agreements, or in talks with trade unions and the government that lead to tripartite agreements (see below under ‘Tripartite and bipartite arrangements’).

Those organisations considered as NPEOs for the purposes of this study which have an essentially sectoral scope often engage directly in collective bargaining for their particular sector or group of related sectors. For example, this occurs in Denmark, Hungary, Italy, the Netherlands, Portugal, Slovenia and Sweden. In Austria and Slovenia, sectoral collective bargaining is conducted by the relevant sectoral sections and units of the NPEOs, rather than independent employer organisations – therefore, the peak associations (WKÖ in Austria, GZS, ZDS and ZDODS in Slovenia) essentially conduct all sectoral bargaining directly.

Where they are not direct parties to sectoral bargaining, NPEOs in some cases play a role in bargaining at this level and/or in company-level bargaining. For example:

- the industrial relations department of the Cyprus Chamber of Commerce and Industry ([Κυπριακό Εμπορικό και Βιομηχανικό Επιμελητήριο](#), [KEBE](#)) participates directly in collective bargaining at company and sector levels;
- Denmark's DA is involved, during major bargaining rounds in the private sector area it covers, in 'pooling' all the sectoral agreements into an overall settlement for approval by trade union members in a single ballot;
- IBEC in Ireland is sometimes involved in local negotiations in member companies (although this has been diluted by the predominance of national-level collective bargaining since 1987) and represents affiliates in third-party [conciliation, mediation and arbitration](#) processes;
- in Malta, MEA may, at the request of member companies, 'act on their behalf in their capacity as employers in regulating the relations between employers and employees' and also become involved in settling industrial disputes through negotiation and/or arbitration;
- in Sweden, where disputes arise in sectoral bargaining, [SN](#)'s affiliated associations may refer the matter to the peak organisation to seek a solution through direct negotiations with trade unions.

While not engaging directly, some or all NPEOs coordinate the lower-level bargaining conducted by their affiliates in various ways in countries such as the Czech Republic, Denmark, Finland, Germany, Ireland, Italy, the Netherlands, Norway and Portugal. The Netherlands and Norway present particularly clear cases of NPEO coordination:

- the Confederation of Netherlands Industry and Employers ([Verbond van Nederlandse Ondernemingen](#) and [Nederlands Christelijk Werkgeversverbond](#), [VNO-NCW](#)) and the Dutch Federation of Small and Medium-sized Enterprises ([Midden en Klein Bedrijf-Nederland](#), [MKB-Nederland](#)) in the Netherlands provide a high level of coordination through means such as national bargaining recommendations. VNO-NCW has an important affiliate, the General Employers' Association ([Algemene WerkgeversVereniging](#), [AWVN](#)), which supports and organises bargaining over around 500 collective agreements at sector and company level;
- in Norway, on occasions where the Confederation of Norwegian Enterprise ([Næringslivets Hovedorganisasjon](#), [NHO](#)) does not negotiate at intersectoral level on behalf of its sectoral affiliates and bargaining takes place at branch/industry level, it plays a major coordinating role. NHO is party to all agreements, together with the relevant sectoral federations, and exerts strong central authority over the federations' bargaining. It also sometimes adopts general guidelines for company-level bargaining within the framework of sectoral agreements.

Most NPEOs provide, to varying degrees, support for the collective bargaining conducted by their affiliates, through advice, assistance, information, statistics, consultancy and training. An exception is Austria's IV, which, although legally entitled to bargain, refrains from activity in the collective bargaining arena, which it leaves exclusively to WKÖ. Other peak organisations that seem to provide only limited bargaining support or services to affiliates include all peak associations in Hungary, the [Irish Small and Medium Enterprises Association \(ISME\)](#) in Ireland, the [Latvian Confederation of Employers \(Latvijas Darba Devēju Konfederācija, LDDK\)](#) in Latvia, LPK and LVDK in Lithuania, UEL in Luxembourg, AZZZ SR and RUZ SR in Slovakia, and the [Confederation of British Industry \(CBI\)](#) in the UK.

Recent changes

There have been few significant changes in the bargaining role of NPEOs over recent years. However, in several countries, NPEOs have either taken on or abandoned, temporarily or perhaps permanently, a direct cross-industry bargaining role with trade union confederations:

- in Bulgaria, in 2007 the social partners concluded a first-ever bipartite agreement on recommended annual pay increases in the private sector. However, they were unable to do so again in 2008;
- in Finland, a long period of national incomes policy agreements came to an end in 2007, when EK and the trade union confederations were unable to agree a new national accord. EK now favours wage formation based on sector, company or individual-level bargaining and appears to have given up its former direct role in cross-industry bargaining on pay and conditions;
- in 2002, Spain's cross-industry social partners started to negotiate annual agreements laying down guidelines for lower-level collective bargaining on pay and employment conditions. This continued until 2009, when the partners were unable to reach an agreement, due to disagreements over the economic crisis and its impact on bargaining.

Slovenia's OZS formerly represented its members' interests in collective bargaining. However, membership of OZS is compulsory for crafts enterprises, and legislation adopted in 2006 provided that from 2009 only employer organisations with voluntary membership may conclude collective agreements. OZS thus lost its bargaining role in May 2009.

Tripartite and bipartite arrangements

All countries considered here have some type of national tripartite consultative or advisory arrangements, in which NPEOs are represented alongside peak trade union organisations and the government/public authorities. These may take the form of: standing, formal structures, dealing with general social/economic and/or legislative matters, or with specific issues; ad hoc committees or working groups addressing specific matters; representation on the boards of bodies regulating areas such as the labour market, social security, dispute resolution or **health and safety**; or less formal arrangements. It is not within this report's remit to examine tripartite arrangements in detail, but it may be noted that they differ between countries in terms of their nature and extent, their degree of formality, their influence, the issues dealt with and the outcomes. In some countries, the arrangements are extensive and play an important role in making policy and legislation, while in others they are limited in scope and play a less decisive role.

In most countries, these tripartite arrangements have been largely stable over the past decade or so. However, such systems are still developing in some of the CEECs, and with them the input and influence of NPEOs. Examples include Bulgaria, Hungary and Latvia. In Malta, the government has lately intensified social partner consultations on issues of national importance, such as the state budget. In the UK, where there are few formal national tripartite bodies, there has been a growth in more informal and ad hoc tripartite partnership in recent years. Moreover, the UK implementation of EU employment directives has resulted in previously unknown forms of tripartite agreement on **information and consultation**, and **equal treatment** for temporary agency workers.

The economic crisis that has hit Europe since 2008 has intensified tripartite dialogue in a number of countries, such as Malta and Slovenia. At the same time, it has led to forms of tripartite agreement on measures to tackle the crisis in countries such as Estonia, Lithuania, the Netherlands, Poland, Spain and Romania.

The identity of the NPEOs that participate in national tripartite structures and processes has changed in some countries. As noted above (see under ‘Recent structural changes’), there have been recent mergers in Bulgaria, Finland and Malta, and new NPEOs have been created in Poland, Romania, Slovakia and Slovenia. In most cases, the new organisations participate fully in national tripartite arrangements. Furthermore, in Bulgaria and Portugal, existing organisations have recently been admitted to formal tripartite dialogue.

Not all of the organisations considered as NPEOs for the purposes of this report are fully involved in tripartite arrangements and this can be a source of controversy. In Ireland, for example, ISME does not participate in national social partnership processes and has unsuccessfully (reportedly due to opposition from IBEC) sought admission on a number of occasions, arguing that the interests of SMEs are inadequately represented at the highest levels. ISME was offered a ‘secondary’ role in the process, but refused and continues to lobby for a more influential role. In Poland, participation in the central-level tripartite social dialogue is dependent on meeting specific representativeness criteria. KP Lewiatan has attempted to meet these conditions since its establishment in 2004 but has so far been unsuccessful.

In most countries, NPEOs and trade union organisations engage in bipartite dialogue (short of collective bargaining) on issues of mutual interest. This may occur through formal structures – as seen in Belgium, Denmark and the Netherlands – on the basis of cooperation agreements, or on a more informal and ad hoc basis. The dialogue may lead to agreements, other joint texts and various other types of joint work. As with tripartite dialogue, these bipartite processes are generally stable in most countries, albeit with varying degrees of harmony between the parties, but ongoing changes can be detected in some cases.

Bipartite dialogue has deepened in recent years in some CEECs. For example, in the Czech Republic the NPEOs and trade union confederations signed a cooperation agreement in 2004, seeking to reinforce bipartite dialogue through, for example, drafting joint proposals to the government.

In Finland, the 2000s have seen a trend towards a new ‘continuous negotiation’ system, rather than the previous situation where the main engagement between peak employer and trade union organisations was the negotiation of national incomes policy agreements. Under this new system, the social partners have been setting up a range of joint projects and working groups on a bipartite or tripartite basis.

As well as increased tripartite dialogue (see above), the period since the late 1990s has seen increased, generally informal, bipartite cooperation in the UK, resulting in joint texts on various issues. The national implementation of ‘autonomous’ [framework agreements](#) reached by the EU-level cross-industry social partners has involved the production by the UK social partners of joint guides on implementing the European agreements on issues such as telework (2002) and work-related stress (2004). The implementation of these European agreements has also prompted innovation in bipartite national dialogue in countries such as Luxembourg.

Other roles

Beyond the collective bargaining and representative functions discussed above (and representation in European and international bodies), all NPEOs provide other services to their affiliates. Because almost all NPEOs are ‘dual’ organisations, which represent both labour market/industrial relations interests and other business interests, many of these services relate to areas other than employment-related matters. Among the NPEOs examined here, the most common services and other roles provided are:

- lobbying governments and other public authorities (including at international level) and general opinion-forming in relation to the wider public;
- providing expert advice and consultancy services to affiliates, in a wide range of business-related areas, including legal and industrial relations matters;
- providing information, research, analysis and statistics on economic, social, tax, human resources, environmental and other relevant matters, primarily for affiliates but also sometimes aimed at feeding wider debates;
- offering or organising training and education on business-relevant matters to members and their employees;
- organising contacts, meetings and networking opportunities for affiliated companies, often including the organisation of or participation in exhibitions and trade fairs;
- giving assistance for affiliated companies in exporting and finding foreign trade partners, and in some cases promoting foreign inward investment.

The mix and extent of services offered varies from organisation to organisation, but most associations provide the majority of services listed above. In some CEECs, however, such as Latvia, Lithuania and Slovakia, NPEOs appear to be quite limited in their services, perhaps because of a lack of resources. Luxembourg's UEL also seems to provide relatively few member services of the type listed above, possibly because it is very much an umbrella body and many of its member organisations are virtually NPEOs and offer such services themselves.

Changes in services

A number of NPEOs have recently altered the nature or extent of the services they offer affiliates, reflecting developments in national contexts and employers' needs. A notable change has occurred in Italy, where NPEOs have extended the services provided to members. In the area of advice and assistance – in addition to 'traditional' topics, such as legislation, tax and industrial relations – they have increasingly focused on 'business development' issues such as internationalisation and new markets, finance and technology transfer. The Italian NPEOs have also increased lobbying and representation activities towards political institutions, apparently acquiring greater influence on policymaking at national and territorial level (especially in the case of Confindustria). Many NPEOs, including those representing cooperatives and crafts enterprises, have created affiliated companies to furnish services to their members, such as training and credit facilities. Confindustria has begun a 'modernisation of its membership system' intended to optimise management costs and make its business representation activity more efficient – for example, by merging sectoral and territorial structures.

Another case of significant change is Ireland, where NPEOs have increased the range of services and expert advice to affiliates, notably in the area of employment law, which has become increasingly complex. This has resulted in a major change of approach for CI, which had previously largely confined itself to lobbying on business issues. Since 2005, it has offered companies an employment consultancy service, which includes information and representation and an 'insurance policy' against awards made to employees in employment law cases.

Other examples of change in services include the following:

- in Bulgaria, the Bulgarian Industrial Association – Union of the Bulgarian Business ([Българска стопанска камара – Съюз на българския бизнес, BIA](#)), the Bulgarian Chamber of Commerce and Industry ([Българска търговско промишлена палата, BCCI](#)) and the Union for Private Economic Enterprise ([Съюз за стопанска инициатива, UPEE](#)) have

become very active in providing assistance to members in preparing projects under programmes funded by the EU budget or European-level employer organisations, while all NPEOs have expanded training and capacity-building activities;

- in Cyprus, the Employers' and Industrialists' Federation ([Ομοσπονδία Εργοδοτών και Βιομηχάνων, ΟΕΒ](#)), which deals mostly with industrial and labour issues, has decided to provide business with more support and assistance in relation to modern management practices. Therefore, in 2005, in collaboration with the Hellenic Management Association ([Ελληνική Εταιρεία Διοίκησης Επιχειρήσεων, ΕΕΔΕ](#)), it founded an independent, although closely linked, management development association aimed at promoting and improving management principles and practices;
- Estonia's ETTK has developed and professionalised its services in areas other than industrial relations in recent years, especially with regard to product market-related issues and policy development;
- Austria's two NPEOs have undertaken internal restructuring since the early 2000s, to economise on resources in the face of a greater focus by member companies on costs and benefits. This change, regarded as a success by both organisations, has affected services to affiliates. To enable it to cut membership dues, WKÖ reduced its staff, redistributed activities and tasks, and started charging for more 'sophisticated' services to members. IV also cut staff, and reorganised and outsourced in-house services;
- the National Association of Entrepreneurs and Employers ([Vállalkozók és Munkáltatók Országos Szövetsége, VOSZ](#)) in Hungary has increased its recruitment among SMEs and self-employed persons by organising more vocational training and becoming a partner in a government programme to facilitate SMEs' access to preferential credit. In 2009, four NPEOs mainly representing SMEs enlarged their service provision through a national network of 'legal points' to provide free legal assistance.

In general, an increased focus on service provision to members is also reported from countries such as Belgium and Sweden.

Sectoral organisations

Sectoral employer organisations (SEOs) organise employers in a particular sector of the economy – or in several adjoining sectors – at national level. They may be affiliated to an NPEO, or be independent.

Structure

Table 2 below sets out brief details of the structure of SEOs in the 27 countries under consideration. In most countries (15), SEOs are present throughout the economy, covering all or almost all branches. This is the case in Belgium, Cyprus, the Czech Republic, Denmark, Finland, Germany, Greece, Italy, Luxembourg, the Netherlands, Norway, Portugal, Slovakia, Spain and Sweden. SEOs also seem to extend across much of the economy in Bulgaria, Hungary and Latvia.

At the other extreme are Austria and Slovenia where, by and large, SEOs do not exist and NPEOs represent employers' interests at sector level through internal structures. This is also largely the case in Ireland and Malta, although some important sectoral bodies are evident in these cases.

In the remaining five countries, mainly CEECs, SEOs are present in some areas of the economy, but not others. This is the case in Estonia, Lithuania and Poland. A lack of data means that the picture is not clear in Romania, but the SEOs that sign collective agreements seem to be largely concentrated in manufacturing.

The UK situation is distinctive. SEOs once covered much of the economy but a major decline in sectoral collective bargaining has left only a few sectoral bodies that meet the statutory definition of employer organisations – that is, organisations whose main purposes include the regulation of relations between employers and workers or trade unions. However, in addition to employer organisations that meet the statutory definition, there are trade associations (some of which were formerly employer organisations) in almost all sectors and some of these provide members with advice and information on employment issues.

In most countries, there are both SEOs covering broadly defined sectors and very narrow and specific associations. The former are, in some cases, themselves umbrella bodies for lower-level associations, as is often the case in Italy, Luxembourg and the Netherlands. In some countries 'super' sectoral federations exist, covering a number of related sectors – examples include [Agoria](#) (industry) and [Fedis](#) (services) in Belgium; DI (manufacturing, transport, commerce and other services) in Denmark; Norwegian Industry ([Norsk Industri](#)) and [NHO Service](#) in Norway; ZPS in Slovakia; the Association of Swedish Engineering Industries ([Teknikföretagen](#)) (a wide range of metalworking-related sectors and subsectors) in Sweden; and the [Engineering Employers' Federation \(EEF\)](#) (manufacturing, engineering and technology-based industries) in the UK.

The number of SEOs varies widely between countries, reflecting factors such as: the broad or narrow scope of these associations; the extent to which SEOs are present across the whole economy; whether or not there are separate NPEOs for specific types of company – notably SMEs and crafts – and thus multiple associations in individual sectors; and the structure and size of the economy. While data are not available for all countries, examples of those with relatively few SEOs (but high overall coverage by such associations of the national economy) include the Czech Republic, Denmark, Finland, Germany, Luxembourg, Slovakia and Sweden. Countries with large numbers of SEOs include the Netherlands, Italy, Cyprus, Belgium, Bulgaria and Spain.

All or almost all significant SEOs are affiliated to NPEOs in Belgium, Bulgaria, Cyprus, the Czech Republic, Denmark, Estonia, Finland, Germany, Luxembourg and Spain. High levels of membership of NPEOs (although with significant exceptions) are also found in Greece, Italy,

Latvia, Lithuania, the Netherlands, Norway, Poland, Romania, Slovakia and Sweden. In Portugal, relatively few of the numerous SEOs are affiliated to the NPEOs, but it should be noted that the NPEOs are themselves to some extent sectoral bodies.

Outside the affiliates of the NPEOs, independent SEOs (which do not qualify as peak associations under the definition used in this report), are most commonly found in the following sectors:

- finance (banking and/or insurance), as in Greece, Italy, Norway, Portugal and Sweden;
- hotels/catering, as in Greece, Ireland and Malta;
- agriculture, as in Austria, Finland and Norway;
- cooperatives, as in Austria, Norway and Portugal;
- state churches, as in Finland, Norway and Sweden;
- parts of the transport sector, as in Italy, Malta and Poland;
- construction, as in Greece, Ireland and Portugal.

In other sectors, particularly important unaffiliated sectoral associations include ZPS in Slovakia and SOCR ČR in the Czech Republic.

Table 2: Structure of SEOs in EU and Norway

AT	Employers' interests are represented at sector level by the various subunits of the compulsory-membership WKÖ. The latter has seven broad federal divisions, covering: craft production; manufacturing industry (including construction, mining and quarrying); commerce; banking and insurance; transport; information technology (IT) and consulting (including telecommunications and broadcasting); and tourism and other services. Each of these divisions is in turn divided into narrower federal branch subunits, of which there are 130 in total. Outside WKÖ, there are only: compulsory-membership chambers and voluntary associations in agriculture; two bodies representing cooperatives; and an organisation representing enterprises and institutions with public participation and/or ownership, along with enterprises providing services of general interest.
BE	Almost all SEOs are affiliated to the NPEOs, which have more than 180 such affiliates. They represent employers on over 100 sectoral joint committees. SEOs can be very small and represent only a few companies in a minor sector (such as inland water transport) or large multi-sector organisations, which are represented on a range of sectoral joint committees (such as Agoria in industry and Fedis in services). In some sectors, separate organisations exist for small and/or larger companies. In a few sectors (such as transport), there are separate regional organisations.
BG	All significant SEOs are affiliated to the country's six NPEOs, which claim a total of around 280 such affiliates. However, SEOs may belong to more than one peak body and the actual number of SEOs is around 170. Organisations affiliated to BIA, BCCI and, to some extent, CEIBG tend to cover broad sectors while the others tend to represent narrow branches.
CY	All SEOs are affiliated to the country's two NPEOs, which have around 200 such affiliates. Sectoral associations cover all sectors of economic activity, with the largest in building, banking and hotels. Some cover small sectors, such as solar energy or dental laboratories.

CZ	Almost all significant SEOs are affiliated to the country's two NPEOs, which have 36 such affiliates. At least one SEO operates in most sectors, and many are multi-sector bodies (covering two or three industries). They tend to be national bodies, representing most large companies in their sectors, although often not SMEs. Density is highest in sectors such as mining, road transport, the automotive industry, the chemicals and pharmaceuticals industries, and energy production and distribution. The main SEO not affiliated to a peak association is SOCR ČR, formerly a member of KZPS.
DE	All SEOs, which cover virtually the entire (private sector) economy, are affiliated to the two NPEOs. The general NPEO, BDA, has 57 sectoral affiliates, in most cases themselves made up of lower-level associations (over 1,000 in total) at regional level. These lower-level associations are usually affiliated to both a national SEO and one of BDA's 14 regional cross-industry organisations. In the crafts sector, the members of the German Association of Skilled Crafts Confederations (Unternehmensverband Deutsches Handwerk , UDH) – part of the ZDH peak association – comprise 38 confederations of guilds and eight professional associations.
DK	There are 18 SEOs, almost all affiliated to NPEOs, while one sectoral association, FA, is considered a peak association. SEOs cover the whole private sector. A few cover narrow sectors (such as master painters) but most are relatively broad and one, DI, is a wide multi-sector body covering large parts of manufacturing, transport, commerce and other services.
EE	The number of SEOs is unknown, but the 24 affiliates of the sole NPEO are thought to make up the great majority of such organisations. Their coverage is patchy, and no SEOs are evident in sectors such as personal services, catering, or post and courier activities. On the other hand, SEOs are present and active in sectors such as transport (where representation is high), engineering or the performing arts. Where present, SEOs tend to cover relatively narrow sectors.
EL	Most significant SEOs are affiliated to the country's NPEOs. There are thought to be at least 69 SEOs, 52 of which are national in scope, while the remaining 17 cover a particular geographical area. SEOs cover almost all branches of economic activity. Three important SEOs are not affiliated to peak bodies, representing banks, hotels and contracting companies.
ES	All significant SEOs are affiliated to CEOE, the general cross-industry NPEO, which has 164 such affiliates, and in most cases also to CEPYME, the SME cross-industry NPEO. SEOs cover the whole range of economic activities. While all CEOE-affiliated associations are national, their sphere of activity varies considerably, including organisations that cover: a whole major sector, such as construction, metalworking or chemicals; an important subsector, such as the automotive industry or large distribution companies; or a relatively small and specialised sector, such as glass/ceramics or footwear.
FI	Almost all significant SEOs are affiliated to the sole NPEO, EK, which has 35 such affiliates. These cover the entire private sector and all company sizes in each branch. Outside EK, there are SEOs for agriculture and for the Lutheran Church of Finland.
HU	No data are available on the number of SEOs, although some NPEOs have sectoral structures – for example, the Confederation of Hungarian Employers and Industrialists (Munkaadók és Gyáriparosok Országos Szövetsége , MGYOSZ) has 50 affiliated sectoral associations, while the members of the National Federation of Craftsmen

	Boards (Ipartestületek Országos Szövetsége IPOSZ) include 39 national sectoral crafts associations. Some SEOs belong to more than one NPEO, while some sectors (such as the information and communication technologies (ICT) and automotive industries) have more than one SEO.
IE	SEOs are found in only certain branches, with employers in other sectors primarily represented by the NPEOs (notably IBEC). The two main national SEOs cover construction (the Construction Industry Federation (CIF) , which itself has 37 member associations) and hotels.
IT	Most significant SEOs are affiliated to Italy's 14 NPEOs. The number of SEOs is unknown but high. For example, Confindustria has 22 sectoral federations, the General Italian Confederation of Commerce and Tourism (Confederazione Generale Italiana del Commercio e del Turismo , Confcommercio) has 146 national trade organisations, the General Italian Confederation of Artisans (Confederazione Generale Italiana dell'Artigianato , Confartigianato) has 12 category federations and 74 crafts groups, and the National League of Cooperatives and Mutuals (Lega nazionale delle Cooperative e mutue , Legacoop) has 11 national sectoral associations. SEOs appear to cover most areas of economic activity. SEOs are normally made up of subsectoral associations. The most important SEO is the Confindustria-affiliated Italian Federation of Metalworking Industries (Federazione Sindacale dell'Industria Metalmeccanica Italiana , Federmeccanica), which is distinctive in that companies are not members directly or through subsectoral associations, but through Confindustria's territorial associations. The most important SEOs not affiliated to the NPEOs cover insurance, banking, transport/logistics and newspaper publishing.
LT	Most significant SEOs are affiliated to Lithuania's two NPEOs – the largest unaffiliated sectoral business organisations, in commerce and agriculture, do not function as employer organisations. LPK has 32 such affiliates and LVDK has an unknown number, albeit probably over 40. SEOs cover all main areas of industry but are somewhat scarcer in services.
LU	Almost all significant SEOs are affiliated to the sole NPEO, UEL, which covers the whole private sector, except the primary sector. UEL has eight member organisations. Two are statutory chambers, with compulsory membership, the Chambers of Trade (crafts companies) and of Commerce. The six other affiliates are SEOs proper, covering manufacturing/construction, banking/finance, insurance, commerce/transport, crafts, and hotels/catering. Some of these broad SEOs (such as those for crafts and manufacturing/construction) are themselves made up of lower-level associations.
LV	Many SEOs are affiliated to the sole NPEO. There are 48 sectoral associations in total, covering a wide range of sectors and including companies of all sizes and those with some public ownership. SEOs tend to cover wide sectors.
MT	The three NPEOs do not have SEOs as affiliates, but represent employers directly. There are 16 SEOs representing some employers not covered by the NPEOs. They cover a mixture of broad and narrower sectors, with the largest being two associations for hotels and catering, and associations representing public transport and meat vendors.
NL	Most SEOs, and all of the most significant ones, are affiliated to the country's NPEOs, which have around 650 such affiliates (at national and lower levels) out of an estimated 800–1,200 SEOs. SEOs cover almost all economic activities and, on the

	whole, represent a high proportion of relevant employers. Some SEOs group subsectoral associations. The size of the sectors covered varies widely, with the largest associations including those in metalworking and construction.
NO	The majority of SEOs (21 out of 38) are affiliated to the general cross-industry NPEO, NHO, while the other NPEO, the Federation of Norwegian Commercial and Service Enterprises (Handels- og Servicenæringens Hovedorganisasjon, HSH), directly represents employers in private services. SEOs exist in most sectors, although HSH dominates in the commerce sector. Some cover relatively narrow sectors, while others organise across several sectors/subsectors – for example, the NHO-affiliated Norwegian Industry and NHO Service are multi-sector organisations. SEO membership tends to be higher among larger companies. The most important SEOs not affiliated to NHO cover: deregulated state-owned/former state-owned companies in sectors such as railways and hospitals; shipping and certain offshore oil-related activity; finance; agriculture; cooperatives; private kindergartens; and the church.
PL	Many SEOs are affiliated to the NPEOs (except the Business Centre Club (BCC) , which has only direct employer membership), which have around 60 such affiliates. SEOs are not present in all branches. Some SEOs cover broad sectors (especially the affiliates of the Confederation of Polish Employers (Konfederacja Pracodawców Polskich, KPP)), while others cover relatively narrow sectors (particularly affiliates of the Polish Crafts Union (Związek Rzemiosła Polskiego, ZRP)). A relatively high number of SEOs are not affiliated to NPEOs, of which the most important are in energy/fuel, food processing, healthcare, railways, road transport and textiles.
PT	Portugal's four NPEOs are, to some extent, sectoral organisations. There are thought to be around 300 active SEOs, mostly covering narrow sectors at regional level. The proportion of SEOs affiliated to the NPEOs is unknown, but is probably more than 20%. SEOs exist in almost all areas of economic activity. Major SEOs not affiliated to peak associations include those covering construction/public works, banks, cooperatives (agricultural and non-agricultural), solidarity institutions and mutual societies.
RO	The number of SEOs is unknown, but of the 23 that currently sign industry-level collective agreements, a majority are affiliated to an NPEO, with the Employer Confederation of Romanian Industry (Confederația Patronală din Industria României CONPIROM, CONPIROM) and the General Union of Romanian Industrialists 1903 (Uniunea Generală a Industriașilor din România 1903, UGIR 1903) having the most affiliates involved. Of the 13 NPEOs, seven appear to have sectoral associations as members. The SEOs that sign collective agreements seem to be largely concentrated in manufacturing.
SE	Most significant SEOs are affiliated to the leading general cross-industry NPEO, SN, which has around 50 such affiliates. A cross-industry NPEO for SMEs, the Swedish Industry Association (Svensk Industriförening, Sinf), has 22 sectoral affiliates. SEOs exist in all sectors. They generally cover broad sectors: for example, Teknikföretagen represents a wide range of metalworking-related sectors and subsectors. SEOs usually represent a large proportion of employers in the relevant sector. As well as the broadly sectoral organisations (such as for cooperatives) classed as NPEOs for the purposes of this report, the main unaffiliated SEOs are those covering real estate (private and public), banking, hairdressing, master painters, the performing arts, the labour movement and the Church of Sweden.

SI	Employers' interests are represented at sector level by the various sectoral sections of the four cross-industry NPEOs (GZS, ZDS, OZS and ZDODS) and, in trade/commerce, by TZS, which is considered an NPEO although it has a sector-specific character. Apart from TZS, there are no SEOs proper, although a compulsory-membership chamber for doctors acts as an employer organisation for doctors with staff. Similar bodies have recently been created for road transport and suppliers of catering services. ZDS has recently provided for the creation of sectoral associations by its member companies, but none has yet been established.
SK	Most significant SEOs are affiliated to Slovakia's two NPEOs, which have 45 such affiliates. SEOs are present in almost all sectors, and represent both broad and narrower sectors. The largest and most important SEO, ZPS, groups 12 lower-level associations, covering most significant companies in manufacturing. ZPS is one of a number of important SEOs not affiliated to an NPEO.
UK	As defined in national legislation, there are 134 sectoral associations, a number of which – including some of the largest – are affiliated to the sole NPEO (the exact number is unknown). SEOs have patchy coverage, being present mainly in: manufacturing, both relatively major industries (for instance engineering and chemicals) and very small (often traditional) industries; construction and its subsectors; agriculture; road transport; local government; skilled trades; arts and entertainment; and specific areas of largely independent retail. Large swathes of services are absent, as, broadly speaking, are more 'modern' industries. Some 34 associations, representing relatively significant sectors, account for nearly 90% of total SEO membership. Outside the 34 largest associations, most SEOs cover small (and in some cases very small) sectors or subsectors and/or represent sectoral employers in particular regions. The membership of most SEOs is made up largely of smaller companies. In addition to formally defined employer associations, there are trade associations in almost all sectors and some of these provide members with advice and information on employment issues.

Source: EIRO national centres, questionnaire responses, 2009

Recent developments

There is a clear trend in many countries for SEOs to merge to form larger organisations – as seen, for example, in countries such as Belgium, Bulgaria, Denmark, Estonia, Finland, Italy, Malta, Norway, Portugal, Sweden and the UK.

In some cases, these mergers are a response to the shrinking of manufacturing. A notable example is the creation by merger in 2006 of Norwegian Industry, NHO's largest affiliate, representing a wide range of manufacturing and process industries. The explicit aim of the merger was to strengthen the political influence of industry and achieve a more efficient use of resources at a time when traditional manufacturing is in decline. The UK's engineering sector saw similar consolidation in 2008. Mergers can arise where traditional industries shrink to such an extent that they may be unable to maintain a viable standalone employer association. An example is the recent merger of the organisations representing the wood/furniture industry and textiles in Belgium. In some cases, however, associations in small and dwindling sectors may simply disappear when their membership falls below a minimum sustainable level, as has occurred in Malta, Sweden and the UK.

Another response to a falling membership base in a declining sector is for an organisation to open itself up to employers in newer hi-tech sectors, through reorganisation and 'rebranding'. For

example, in Belgium, Agoria, which traditionally organised metalworking, now calls itself the employer organisation for the technology industries. Moreover, the country's chemicals industry association has been renamed [Essencia](#) and now defines itself as a multi-sector umbrella organisation representing numerous chemicals and life sciences activities.

While mergers and extinctions obviously tend to reduce the number of SEOs, many countries have also seen the creation of new organisations over the past decade or so. Notably, organisations have been formed in new or growing services and hi-tech sectors, as in Belgium, Italy, the Netherlands and Spain. In Spain, for instance, SEOs have recently been set up in e-learning, consultancy and training, health and safety services, and care services. In Italy, SEOs have been created and then consolidated by merger in ICT and 'advanced service businesses', and also in temporary agency work – where three associations merged in 2006, although some members split to form a new organisation in 2008. However, this tendency is by no means universal – for example, in Malta companies in emerging services activities (such as financial services, IT and call centres) appear reluctant to set up employer organisations.

Privatisation and deregulation/liberalisation may lead to the establishment of employer organisations in traditionally publicly-owned sectors. For instance, two new associations were set up in Germany's postal services in 2007: one representing [Deutsche Post](#) and other companies that previously belonged to the former state-owned provider; and the other largely made of [Deutsche Post](#)'s competitors. Another example is the creation of an SEO in the Belgian electricity sector.

Hungary has seen a growth in SEOs following the creation of sectoral social dialogue committees, with government support, in the early 2000s. This led some NPEOs to strengthen their existing sectoral organisations in order to ensure participation, while other NPEOs whose membership previously included only regional federations or individual companies made considerable efforts to create their own sectoral bodies. The establishment of the committees also triggered the organisation of employers in newly developing areas, such as private security services.

In most countries, SEOs are usually 'dual' bodies that represent both labour market/industrial relations interests and other business interests. This is not always the case in countries such as Germany and Sweden, where separate employer and trade associations co-exist in some industries. Recent years have seen several mergers of these separate organisations to form dual associations, as observed in Sweden's IT and telecommunications industries, or in the German salt production industry.

In the UK, a long-term steep decline in the number of SEOs has partly been due to definitional issues. The statutory definition (see above) essentially includes only organisations that are involved in collective bargaining in some way, and the decline of industry-level bargaining has greatly reduced their numbers. However, many continue as trade associations, which may provide employment-related services to members. In Poland, by contrast, a growing number of trade associations have in recent years taken on the legal status of employer organisations.

As noted above, Slovenia has no sectoral employer bodies as such (with the exception of TZS, which is classified here as an NPEO). However, one of the general cross-industry NPEOs has recently provided for the creation of sectoral associations by its member companies, although none has yet been established.

Collective bargaining

Sector-level collective bargaining covers a relatively high proportion of economic sectors in most of the countries examined – that is, Austria, Belgium, Bulgaria, Denmark, Finland, Germany, Greece, Italy, Norway, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden. It is somewhat more limited in its coverage in Cyprus and the Czech Republic, very limited in Estonia, Hungary, Ireland, Luxembourg, Poland and the UK, and almost non-existent in Latvia, Lithuania and Malta.

Where sectoral bargaining occurs, it is in nearly all cases conducted by national-level SEOs. The exceptions are Austria and Slovenia, where most bargaining of this nature involves the sectoral structures of NPEOs, with exceptions of agriculture and cooperatives in Austria. In Germany, sectoral bargaining is usually undertaken by the regional affiliates of national SEOs, but with the latter coordinating the formers' bargaining strategies. Similarly, in Spain, bargaining occurs at regional or provincial levels in some industries, and the national SEOs play a strong coordinating role in this process. In Italy, the highest-level SEOs coordinate bargaining by member associations at subsector or regional/provincial level, while regional bodies play an important role in sectoral bargaining in Portugal.

The company is the key collective bargaining level in countries such as Cyprus, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland and the UK. Company-level bargaining of various types is present in most other countries, usually with frameworks of varying rigidity set by sectoral (or sometimes cross-industry) agreements. In many cases, SEOs provide support such as advice, assistance and training to member firms in conducting company-level bargaining – as seen for example in Bulgaria, the Czech Republic, Denmark, Estonia, Germany, Ireland (principally in the construction sector), Italy, the Netherlands, Poland, Romania, Slovakia, Sweden and the UK. This rarely appears to go as far as explicit coordination of company-level bargaining within sectors, although this does occur in countries such as the Czech Republic, Denmark and Slovakia. In Norway, SEOs may issue general guidelines for company-level bargaining and become involved if the local parties cannot reach agreement. Swedish SEOs may also provide assistance or take over the negotiations if company-level negotiations break down.

Recent developments

In a number of countries, collective bargaining has become increasingly decentralised in recent years, in most cases from the sector to company level. In the UK, this process, which involved a wholesale collapse of sectoral bargaining and a shift in focus to the company or establishment level, occurred largely before the 1990s and was accompanied by a reduction in the number and membership of SEOs – since then, the greatly reduced remnant of sectoral bargaining has remained relatively intact. In other countries, the process is ongoing at present, taking various forms and proceeding at varying speeds, although in no other countries with traditionally strong sectoral bargaining has it yet been marginalised to the extent that it has in the UK.

A key driver of bargaining decentralisation is the wish of individual employers to have greater **flexibility** in setting pay and employment conditions. One route to achieving this is to withdraw completely from the coverage of sectoral collective agreements. Companies may do this by leaving their SEOs, and this has occurred to some extent in countries such as Slovakia and the Czech Republic, prompting a change in the law in 2007 to clarify that sectoral agreements are binding on employers that disaffiliate from the signatory SEO during the term of the collective agreement. To avoid such membership losses, a number of German SEOs have introduced an option for companies of obtaining membership without being bound by collective agreements signed by the association (known as *Ohne Tarifbindung*, or OT status): for example, the

Employers' Associations for the Metal and Electrical Industry ([Arbeitgeberverbände der Metall- und Elektroindustrie](#), [Gesamtmetall](#)) introduced OT status in 2005. However, in Germany's skilled crafts sector, legislation does not allow for employers to belong to a regional guild (*Landesinnung*) without being bound by its collective agreements. Faced with declining membership, guilds in the vehicle repair sector have sought new organisational patterns. Several have cancelled existing collective agreements and formally renounced their bargaining competence. This has paved the way for the establishment of new employer organisations (*Tarifgemeinschaften*) to take over collective bargaining. In these regions, vehicle repair employers can now join a guild without being bound by collective agreements.

SEOs in some countries have gone further and responded to members' wishes by ceasing to engage in collective bargaining at all. This has happened, for example, in the Czech Republic, with examples in 2008 including sectors such as engineering technology, steel and housing cooperatives. In Greece, there has been a significant breakdown in banking, with the Hellenic Bank Association ([Ελληνική Ένωση Τραπεζών](#), [EET](#)) (which is not affiliated to an NPEO) refusing to participate in collective bargaining since 2008 and resisting attempts to apply compulsory procedures to set pay and conditions for the sector. EET states that it is no longer an employer organisation and is consequently not obliged to enter into collective agreements. Trade unions see this change in identity as an attempt to end bargaining in banking and fear that many other SEOs will follow suit, threatening bargaining in the entire private sector.

However, rather than the drastic step of abandoning sectoral bargaining totally, a more common response by SEOs has been to make this bargaining more flexible, allowing greater scope for company-level flexibility. For example:

- the three-year sectoral agreements signed in the Danish private sector in 2004 and 2007 left considerable scope for company-level flexibility, notably on [working time](#) and [pay](#), as part of an intensifying process of 'centralised decentralisation' over the past 20 years. Since 2007, the sectoral social partners do not have to be consulted on the content of such local agreements;
- in Germany, where coverage of sectoral bargaining has declined perceptibly in recent years, 'opening clauses' have been introduced in a growing number of collective agreements – under such clauses, individual companies can deviate from some aspects of the agreement's provisions, for example on working time, although often subject to rules set out in the sectoral agreement;
- there have been similar moves towards 'opening clauses' in some sectors in Italy (notably chemicals), while a 2009 national agreement on reform of the bargaining system aims to shift the overall focus of bargaining more to the company level, while maintaining sectoral frameworks – although the effects of the agreement are not yet certain, as it was not signed by one of the main trade union confederations. If this occurs, the importance of territorial employer organisations, which are normally involved in company-level bargaining, may increase to the disadvantage of national SEOs;
- in Spain, the trend since 2000 has been towards 'coordinated decentralisation', whereby negotiations on some issues are transferred to the company level, but in coordination with the sectoral agreement;
- in Sweden, sectoral agreements have become looser frameworks, allowing more scope for company flexibility, as has occurred to some extent in the Netherlands – although some commentators argue that this has not happened extensively in practice.

Whether these less rigid sectoral frameworks can survive in the longer term is far from certain in some countries. In Sweden, many SEOs want even fuller scope for company-level flexibility and,

for example, in metalworking Teknikföretagen wants all bargaining to take place at local level in future.

The picture of a weakening of sectoral collective bargaining, and of SEOs' direct bargaining role, is not universal. For example, in Finland, bargaining has become decentralised from cross-industry to sector level since 2007, thus enhancing the role of SEOs. However, at the same time, the role of company-level agreements has also increased. In Bulgaria, sectoral bargaining has spread during the 2000s, partly due to changes in legislation, and now covers practically all large branches, thus increasing the number of SEOs with a negotiating role (although in many smaller sectors there are no agreements due to a lack of a trade union counterpart for SEOs, or a lack of organisational capacity). Furthermore, while it was formerly the associations affiliated to BIA, and to some extent BCCI, that mainly engaged in sectoral bargaining, the affiliates of other NPEOs in Bulgaria have now started to participate in negotiations.

Other roles of SEOs

As well as involvement in collective bargaining where relevant, SEOs generally have a range of other roles. Where countries have tripartite and/or bipartite consultation and dialogue arrangements at the level of individual sectors (for example, in Belgium, Bulgaria, Hungary, Italy, the Netherlands, Norway, Poland, Slovakia and Spain), covering general matters or specific issues such as training, health and safety or social security, SEOs represent employers' interests. They also usually play a major role in representing their industry's interests towards the government and other public authorities through both formal and informal channels.

SEOs provide member companies with services similar to those provided by NPEOs, typically including: lobbying; expert advice and consultancy services; information and analysis; training and education; contacts and networking; and foreign trade assistance.

The Netherlands is one of the few countries where the role of SEOs has been researched in depth. A 2003 survey of 147 associations ranked their tasks in descending order of importance as: lobbying directed at national and local government, consumers' organisations and trade unions; organising services for individual member companies, such as legal advice, or consultancy on technical and operational management issues; promoting the 'social identification' of member companies in their sector; concluding binding external rules, such as collective agreements and covenants with government; and establishing binding internal rules, in areas such as certification and market conditions. Further research in 2005 found that the main industrial relations tasks of SEOs were: concluding collective agreements and organising collective bargaining with trade unions; political lobbying on socioeconomic issues at national and local level; and participation in standing sectoral bipartite bodies (for example, dealing with pensions, social security or vocational training) and tripartite labour market bodies.

Few changes are reported in the non-bargaining role of SEOs in the 2000s. However, there are two cases where a weakening of SEOs' bargaining role appears to have led to a strengthening of activities in other areas. In Sweden, it is reported that over the past decade, members have tended to demand more from their associations beyond their traditional industrial relations role, leading to a greater focus on opinion-forming and trade issues. In the UK, a long-term decline in sectoral bargaining has led to many employer organisations ceasing to function as such and focusing more on being trade associations. Furthermore, in a 2002 survey of 50 UK employer organisations, more than three quarters reported that their role had changed over the past four years. They now tended to be more concerned with playing an advisory, lobbying or campaigning role for their members on issues such as employment legislation than dealing with industry-level pay bargaining.

Subnational organisations

The division of countries into administrative units differs, but most have a regional level and a lower level (provincial or county, for example) and, in some countries, NPEOs include in their membership employer organisations organised at one or both of these levels. Examples include some or all NPEOs in Bulgaria, Cyprus, the Czech Republic, Germany, Greece, Hungary, Italy, Lithuania, Poland, Portugal, Romania and Spain. In other cases, NPEOs do not have geographically-based affiliates, but internal structures at regional and/or lower levels: examples include WKÖ in Austria, EK in Finland, IBEC in Ireland and CBI in the UK. A number of NPEOs have an explicitly ‘two-dimensional’ membership structure, with companies affiliated both to a sectoral organisation and a geographically-based (typically regional) cross-industry association. Notable cases include BDA in Germany and NHO in Norway. The regional dimension of NPEOs is clearest in cases such as Germany’s BDA, Italy’s Confindustria, Spain’s CEOE and CEPYME, and perhaps the Dutch VNO-NCW, which have cross-industry regional organisations that essentially act as peak bodies at this level.

Geographically-based affiliates or structures of NPEOs may often be involved in typical employer organisation activities such as lobbying, contact with public authorities at this level, networking, service provision to member companies, and participation in whatever tripartite arrangements may exist at this level. However, it seems relatively rare for them to play a genuinely important role in industrial relations terms, and this generally occurs only where national political structures devolve important responsibilities, especially in the employment field, to the regional level. This explains the strong regional structures of peak organisations in Germany, Italy and Spain. In Italy, for example, the regional bodies of peak organisations are involved in social dialogue structures at this level and sometimes conclude tripartite agreements on employment issues. In Spain, increasing political devolution, and the subsequent development of regional social dialogue, has raised the importance of peak employer organisations’ structures at this level.

Belgium, with its highly devolved political system, is a particular case. There is no national cross-industry NPEO for SMEs, but separate associations for Flanders (UNIZO) and Wallonia (UCM). In addition, there are general cross-industry peak associations (which are not structures of the national FEB/VBO) in Flanders – the Flanders Chamber of Commerce and Industry ([Vlaams netwerk van ondernemingen](#), [VOKA](#)) – and Wallonia – the Walloon Union of Companies ([Union Wallonne des Entreprises](#), [UWE](#)). These regional bodies are increasingly important and perform a full range of employer organisation activities, including involvement in consultation and dialogue, except collective bargaining.

Catalonia in northeastern Spain has a regional cross-industry body that does not fall within the structure of NPEOs – namely, the Association of Small and Medium-sized Enterprises of Catalonia ([Petita i Mitjana Empresa de Catalunya](#), [PIMEC](#)), which exists alongside the CEOE/CEPYME-affiliated regional body, [Foment del Treball Nacional](#) ([Foment](#)). However, it now appears that the two organisations are moving towards closer links. Poland has a number of local employer organisations that are independent of NPEOs, along with a noteworthy regional cross-industry body – the Employers’ Federation of Western Poland ([Federacja Pracodawców Polski Zachodniej](#), [FPPZ](#)), some of whose member associations also belong to NPEOs.

SEOs at regional or lower level play a significant industrial relations role in those countries where collective bargaining occurs at this level (see above under ‘Sectoral organisations’), notably in Germany, Italy and Spain.

Other forms of employer representation

This section examines forms of employer representation and association that are not based on sectoral or geographical lines.

Employer type

In many countries, company type is an important factor in the structure of employer organisations. Company size is the most common determining factor, with specific SME organisations existing alongside general NPEOs in cases such as Belgium, Bulgaria, Greece, Hungary, Ireland, Italy, Malta, the Netherlands, Spain and Sweden. Crafts enterprises are also separately represented in many countries (with their organisations also including other SMEs in some cases) in countries such as Germany, Hungary, Italy, Poland and Slovenia. SME and/or crafts NPEOs also have sectoral affiliates in many cases.

Employing organisations are not always private companies. Leaving aside the public sector proper, which is not within the scope of this report, employers may also be cooperatives, not-for-profit organisations of various kinds, and companies with substantial public ownership. While these employers are often represented within general associations, in a number of countries they have separate organisations.

Cooperatives have separate peak associations in Hungary, Italy and Sweden. In Hungary, the National Federation of Agricultural Cooperatives and Producers ([Mezőgazdasági Szövetkezők és Termelők Országos Szövetsége, MOSZ](#)) represents mainly agricultural cooperatives and their successor business companies, although it has been seeking to extend its membership beyond cooperatives. The National Federation of Consumer Cooperatives ([Általános Fogyasztási Szövetkezetek Országos Szövetsége, AFEOSZ](#)) represents consumer cooperatives, mainly in commerce, while the Hungarian Industrial Association ([Magyar Iparszövetség, OKISZ](#)) represents industrial cooperatives as well as SMEs. The divisions between Italy's four NPEOs for cooperatives – the General Association of Italian Cooperatives ([Associazione Generale Cooperative Italiane, AGCI](#)), the Confederation of Italian Cooperatives ([Confederazione Cooperative Italiane, Confcooperative](#)), Legacoop and the National Union of Italian Cooperatives ([Unione Nazionale Cooperative Italiane, UNCI](#)) – are, it appears, mainly political and confessional; the left-leaning Legacoop and the church-linked Confcooperative are currently considering a merger. Sweden's Cooperative Movement Bargaining Organisation ([Kooperationens Förhandlingsorganisation, KFO](#)) is an employer organisation for cooperative businesses, and also includes not-for-profit organisations and NGOs. Countries such as Norway and the UK also have significant employer organisations for cooperatives, although they are not considered NPEOs for the purposes of this report.

Sweden has extensive separate representation of the employers' interests with regard to not-for-profit organisations. As well as KFO, the NPEOs for these employers are as follows: the Swedish Employers' Alliance ([Arbetsgivaralliansen](#)), which represents not-for-profit organisations, such as those in healthcare, religion, education and culture, along with sports clubs; and [Arbetsgivarförbundet för ideella organisationer \(Ideia\)](#), which represents voluntary and not-for-profit organisations, competing with KFO. Sweden also has two specific NPEOs – the Municipality Companies' Cooperative Organisation ([Kommunala Företagens Samorganisation, KFS](#)) and the Employers' Association of Local Federations, Local Authorities and Enterprises ([Pacta](#)) – for companies owned by, or having contracts or other close links with county councils or municipalities, for instance in energy, public transport, waste disposal, schools or healthcare. KFS and Pacta are due to merge in 2010.

Somewhat differently, Belgium has a peak association, the Union of For-Profit Social Enterprises ([Union des entreprises à profit social/Unie van socialprofitondernemingen](#), [UNISOC](#)), representing ‘for-profit’ social enterprises, which operate in areas such as health, education, social care and culture. These enterprises are typically not represented in the general, cross-industry FEB/VBO. UNISOC, whose origins date back to 1994, is made up of 46 federations. It does not engage in the national cross-industry collective bargaining process but is represented in the main national bipartite and tripartite structures. For-profit social enterprises also have regional representative organisations.

In Norway, partial or former public ownership is the basis for an employer organisation outside the NPEO framework – namely, [Spekter](#). The latter was established in 1993 as an alternative to the traditional private sector employer organisations, aimed at deregulated state-owned enterprises and privatised former state-owned enterprises. Public sector reorganisation has since expanded [Spekter](#)’s membership, which covers sectors ranging from rail transport to hospitals (since 2002). [Spekter](#) has its own collective agreement structure, which deviates from the Norwegian norm in that it is not strictly sector-based. In Bulgaria, public ownership/privatisation is also a factor, with one peak association – namely, the Bulgarian Industrial Capital Association ([Асоциация на индустриалния капитал в България](#), [BICA](#)), which originally grouped privatisation funds – now representing holding, investment and industrial companies with substantial public ownership.

At European level, the [European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest](#) ([CEEP](#)) represents enterprises and employer organisations with public participation and enterprises carrying out activities of general economic interest, whatever their legal ownership or status. CEEP has national sections in 20 of the 27 countries considered here – the exceptions being Cyprus, the Czech Republic, Estonia, Latvia, Lithuania and Slovenia. These national sections are made up of both individual enterprises/organisations and employer associations. Some of the latter include, predominantly or partly, private sector employers. Examples include the following: NPEOs such as the National Association of Strategic and Public Utility Companies ([Stratégiai és Közszolgáltató Társaságok Országos Szövetsége](#), [STRATOSZ](#)) in Hungary, MEA in Malta, HSH in Norway, KPP in Poland, KFS and Pacta in Sweden; and SEOs such as the Employers’ Association for the Property Sector ([Fastighetsbranschens arbetsgivarorganisation](#), [Fastigo](#)) in Sweden, and [Spekter](#) in Norway. In the UK, the national section of CEEP itself acts in a limited way as an employer organisation, in that it is involved in the UK implementation of the outcomes of the EU-level cross-industry social dialogue.

Finally, separate representation of self-employed persons in their role as employers is not common. Nonetheless, employer organisations for SMEs and crafts enterprises often include self-employed members, with examples including: UCM and UNIZO in Belgium; the Hellenic Confederation of Professionals, Craftsmen and Merchants ([Γενική Συνομοσπονδία Επαγγελματιών Βιοτεχνών Εμπόρων Ελλάδας](#), [GSEVEE](#)) in Greece; the Agrarian Employers’ Federation ([Agrár Munkaadói Szövetség](#), [AMSZ](#)), the National Federation of Traders and Caterers ([Kereskedők és Vendéglátók Országos Érdekképviseleti Szövetsége](#), [KISOSZ](#)) and MOSZ in Hungary; and the Romanian Association of Building Entrepreneurs ([Asociația Româna a Antreprenorilor din Construcții](#), [ARACO](#)) in Romania. In Spain, a specific organisation, the Spanish Federation for the Self-Employed ([Federación Española de Autonomos](#), [CEAT](#)), was created in 2004 within CEPYME, the SME peak association.

Foreign investors

Many countries have organisations representing the business interests of foreign investors and a variety of bilateral trade chambers. In at least two countries with high levels of foreign direct investment, bodies representing investors play a role similar to that of an employer organisation. The clearest case is the [American Chamber of Commerce in Ireland \(AMCHAM Ireland\)](#), which represents over 500 US-based multinationals with operations in Ireland, with a combined workforce of nearly 100,000 persons. AMCHAM Ireland does not engage in collective bargaining (and many of its affiliates are non-union) and is not represented in formal tripartite or bipartite social dialogue arrangements. However, it provides advice and assistance to members on industrial relations and labour market issues, and is active in lobbying the government to promote a business environment that is attractive to its members. AMCHAM Ireland is seen as an increasingly powerful lobby group, able to exert significant influence on government policy. For instance, its opposition to mandatory trade union recognition is widely perceived to be a key factor in the government's unwillingness to introduce such a mechanism.

In Lithuania, the Investors' Forum ([Investuotojų forumas, IF](#)), founded in 1999, represents over 40 major foreign investing companies. Its aim is to improve the business environment, and to this end it maintains regular contacts with the government and other public authorities. IF cooperates with other employer organisations, holding joint events and participating in other initiatives. While it does not engage in collective bargaining or formal social dialogue, IF holds exchanges with trade unions. For example, at a bipartite meeting in April 2009, IF and the trade unions discussed the labour market situation and the regulation of employment relations and agreed to hold periodic meetings in the future.

In a number of other CEECs where foreign-based multinationals play an important role, their representatives may hold senior positions in NPEOs – as is the case at BIA and CEIBG in Bulgaria, and at the Polish Confederation of Private Employers 'Lewiatan' ([Polska Konfederacja Pracodawców Prywatnych 'Lewiatan', PKPP](#)) and KPP in Poland.

CSR and diversity

In numerous countries, organisations have evolved, especially since the 1990s, which group employers around a commitment to pursuing and promoting objectives and policies related to [corporate social responsibility \(CSR\)](#). For example, the business CSR network [CSR Europe](#) has 27 national member organisations in 24 European countries. While these do not act as employer organisations, as defined here, such organisations are often engaged with employment-related issues and their activities may influence aspects of practice. An example is [Business & Society Belgium](#), originally founded in 1998, which brings together over 50 major companies with a common interest in CSR, supported by national and regional peak employer organisations. It promotes CSR in Belgium to bodies such as the government and civil society, and provides companies with tools and information to enable them to develop their CSR policies and activities.

Less commonly, organisations have been created to focus employers' concerns on specific equality and diversity issues. This approach appears to be most prevalent in the UK, where leading examples include:

- the [Employers' Forum on Age \(EFA\)](#), founded in 1996, which is a network of over 240 organisations that 'recognise the value of an age-diverse workforce'. EFA provides practical advice and support, helping members to tackle age discrimination and comply with relevant legislation;

- the [Employers' Forum on Disability \(EFD\)](#), established in 1991, which is a network of private and public organisations that reportedly represent 20% of the UK workforce. EFD aims to help members employ and retain disabled employees, do business with disabled customers and become 'disability confident'. It claims to be 'the world's leading employers' organisation focused on disability as it affects business'.

Women's organisations

Specific organisations for women entrepreneurs and business owners exist in many countries. Examples include Women in Business ([Frau in der Wirtschaft](#)) in Austria, the [Cyprus Federation of Business and Professional Women](#), the Association of German Female Entrepreneurs ([Verband deutscher Unternehmerinnen, VdU](#)), the Association of Women Entrepreneurs and Company Executives ([Associazione Imprenditrici e Donne Dirigenti d'Azienda, AIDDA](#)) in Italy, the Business Women Network ([Verslo moterų tinklas, VMT](#)) in Lithuania and the [British Association of Women Entrepreneurs \(BAWE\)](#) in the UK. Portugal has three such bodies: the National Association of Female Entrepreneurs ([Associação Nacional de Empresárias, ANE](#)), the Portuguese Association of Women Entrepreneurs ([Associação Portuguesa de Mulheres Empresárias, APME](#)), and the Association of Women Entrepreneurs in Portugal ([Associação das Mulheres Empresárias em Portugal, AMEP](#)).

These organisations are often affiliated or otherwise linked to NPEOs. However, none act as employer organisations, and it seems that few deal extensively with employment matters. Their main focus is generally on promoting and supporting female entrepreneurship, lobbying and encouraging networking. Unusually, ANE in Portugal is represented on the national tripartite consultative body, the Economic and Social Council ([Conselho Económico e Social, CES](#)).

Many women's business associations are of long standing, but recent years have seen a number of new initiatives. For example, in 2008, VMT was created within the Association of Lithuanian Chambers of Commerce, Industry and Crafts ([Lietuvos prekybos, pramonės ir amatų rūmų asociacija, LPPARA](#)). VMT's activities include: the promotion of [equal opportunities](#); building CSR; focusing on the specific needs of working women; and improving [work-life balance](#). In Italy, a National Group of Women Entrepreneurs ([Gruppo nazionale Donne Imprenditrici](#)) was set up within the Italian Confederation of Small and Medium-sized Industry ([Confederazione italiana della piccola e media industria, Confapi](#)) in 2005, with mainly lobbying objectives.

Ethnic-based organisations

Ethnic or national background is the basis for business organisations in several countries with large communities of recent immigrant origin, notably Germany, Italy, the Netherlands and the UK. For example, there are several bodies representing entrepreneurs and business owners of Turkish origin in Germany. In the UK, such bodies include the [Asian Business Federation \(ABF\)](#), established in 2000, which claims thousands of members and aims to act as the voice of Asian business in the UK. In Italy, the Association of Immigrant Entrepreneurs ([Associazione degli imprenditori immigrati, Imprendim](#)) was founded in 2004, with the aim of achieving greater bargaining power with institutions, the social partners and particularly banks. There are no reports that any of these organisations operate as employer organisations or focus significantly on employment matters.

Leadership diversity

The gender profile of those holding the top elected positions (such as presidents and members of governing bodies) and executive positions (for example general secretaries) in NPEOs across Europe is largely male. Such examples (as at 2009) can be found in the following countries:

- Bulgaria – BIA has no women on its managing board; BCCI has one woman on the managing board and four women out of 28 chairs of regional chambers; UPEE has seven women out of 28 members on the managing board, although the co-president and vice-president are women; BICA has four women on its 45-member national council; CEIBG has no women on the managing body, although one of the two vice-presidents is a woman;
- Cyprus – OEB has one woman on its 15-member elected executive committee and one of five senior executive positions is filled by a woman; KEBE has no women on its 17-member elected executive committee;
- Norway – in NHO, two of the five members of the top management group are women, and four of the 10 members of the executive board as well as the deputy president are women; in [HSH](#), one of the five members of the top management group is a woman, and three of the nine members of the executive board along with the general secretary are women;
- Spain – one of CEOE's 21 vice-presidents is a woman;
- UK – seven of CBI's 43 key office holders – which include the president and vice-presidents, chairs of standing committees, regional chairs and directors – are women.

Women do currently fill the most senior positions in some peak associations, with examples including: the chief executive of AMCHAM Ireland and the chair of ISME in Ireland; the president of Italy's Confindustria; the president of MCCEI in Malta; the general secretary of HSH in Norway; the president of Poland's PKPP; the general secretaries of the Confederation of Trade and Services of Portugal ([Confederação do Comércio e Serviços de Portugal, CCP](#)) and CTP in Portugal; and the president of the UK's CBI. In the cases of Confindustria and CBI, female presidents have recently been elected for the first time in the organisations' history.

There are some signs of movement towards more balanced gender representation in Italy, Portugal and the UK. In Austria, the WKÖ's organisation of female entrepreneurs, Women in Business, has long criticised women's underrepresentation in WKÖ's governing bodies. In 2008, women made up almost a third of WKÖ members, while occupying only 14% of the representative positions in WKÖ bodies. In order to redress this underrepresentation and give more weight to women's concerns, Women in Business has called for a doubling of the proportion of women in WKÖ bodies by 2010, although without notable success so far.

While there is less information on this point, little evidence is reported of any significant presence of people from ethnic minority groups in senior positions in NPEOs.

In relation to SEOs, data on the gender and ethnic background of those in leading positions are largely absent. However, the overall impression is that women and people from ethnic minority backgrounds are not well represented. Examples of such underrepresentation among SEOs can be seen in the following countries:

- Bulgaria – 15 of BIA's 100 sectoral organisations, and 17 of BCCI's 93 sectoral organisations, have female leaders;
- Denmark – three of the nine members of the executive committee of DI are women, as are three of the 33 members of the board of the Danish Chamber of Commerce ([Dansk Erhverv](#));

- Norway – two of NHO's 21 sectoral federations have female chief executives and two have a woman as the director of their board;
- Sweden – 28% of SN's 50 member associations have women as presidents or chief executives.

The profile of elected leaders of employer organisations tends to reflect the senior management of member companies: women, for example, seem more likely to fill non-elected executive positions in employer organisations. Senior management remains largely dominated by men and people from non-migrant backgrounds, and it appears that this will have to change if employer organisations' leaderships are to become more balanced. There is evidence of such change occurring in countries such as Denmark and especially Norway, where legislation has introduced gender quotas on company boards.

Commentary

In structural terms, at peak level, employers' interests are represented in a great diversity of ways in European countries. As a result, it is hard to draw up a clear classification of national situations. This huge variety reflects factors such as the differing structures of national economies and histories of economic development, not to mention political history in many cases. Overall, peak-level representation is more complex, with more NPEOs in each country on average in CEECs than in the other countries examined, although there are cases of CEECs with simple representation patterns and of west European countries with highly complicated ones.

In the EU15 and Norway, where employer organisations are long established, there is a long-term trend towards consolidation and mergers, aimed at strengthening and rationalising employers' voice. Much of this occurred before the last decade, and overall there is now considerable stability, with few future NPEO mergers reportedly planned. The process of consolidation has mainly involved the merger of associations with narrower membership domains to create general cross-industry NPEOs, or of separate trade associations and employer organisations to create 'dual' NPEOs. Where separate NPEOs exist for SMEs, crafts enterprises or cooperatives, there is no tendency for these to merge with general NPEOs.

In the post-2004 new Member States in central and eastern Europe, where genuine employer organisations have existed for only two decades, there has been a degree of consolidation over this period – for example, recent mergers are evident in countries such as Bulgaria and there are signs of some rationalisation of Romania's hugely complex NPEO structure. However, the situation is still in a state of flux in a number of cases, reflecting continuing economic restructuring and employers' developing perceptions of how best their interests should be represented at peak level. Thus, the period since 2003 has seen the creation of new NPEOs in countries such as Poland, Romania and Slovenia, as well as a split in Slovakia's sole NPEO to create two separate peak organisations.

Employer organisation 'density' varies considerably across Europe. Within countries, however, the overall number of employers that NPEOs represent has been largely stable over recent years, indicating little change in the general 'associational' tendency of employers. There has been an increase in membership in countries such as Bulgaria and Latvia, and only Slovenia reports a significant overall decline, largely because of legal changes. The number of lower-level employer organisations affiliated to NPEOs has also changed relatively little recently, although in some countries it has dwindled due to mergers. However, reflecting the fact that the structure of employer representation has yet to settle into a stable pattern in some CEECs, there have been a number of notable cases of lower-level employer organisations switching affiliation between NPEOs or becoming independent.

The role of NPEOs varies rather less between the countries than their structure and membership. Dealing in various ways with collective bargaining is an important part of this role in most countries. This may involve activities such as: direct engagement in intersectoral negotiations of various kinds, as occurs in nearly two thirds of the countries examined, in sectoral negotiations or, rarely, in company-level bargaining; coordination of lower-level bargaining; or support for bargaining conducted by affiliates, which is provided by most NPEOs. The bargaining role of NPEOs has not changed much over recent years.

Engagement in national tripartite consultative or advisory arrangements is another almost universal role of NPEOs. These arrangements are fairly stable in most countries, but are still developing in a number of cases, such as in Bulgaria, Hungary, Latvia, Malta and the UK, thereby enhancing the influence of NPEOs. In most countries, NPEOs also engage in bipartite dialogue (short of collective bargaining) with trade unions, a process that has recently grown in importance in countries including the Czech Republic, Finland and the UK.

The final aspect of NPEOs' role is service provision to members, which most commonly includes: lobbying; advice and consultancy; information and analysis; training and education; contacts and networking; and foreign trade assistance. While NPEOs' collective bargaining and representative role has, by and large, changed little during the 2000s, many NPEOs have increased their focus on service provision and/or altered the nature or extent of the services they offer affiliates, with the aim of better meeting employers' needs in a changing environment. This often takes the form of providing services in areas other than 'traditional' fields (such as industrial relations), including training, finance/credit, management and legal matters.

SEOs cover all or most economic sectors in about three quarters of the countries examined. The exceptions are a number of countries where NPEOs' internal structures play the main role in representing employers' interests at sector level and a number of CEECs, along with the UK, where SEOs have relatively patchy sectoral coverage.

Recent changes in the structure of SEOs largely reflect changes in the structure of the economy – principally a decline in the traditional manufacturing industry, as well as agriculture in some countries, and a growth in services and high-technology industries. In some countries, developments in employer organisations at this level are also influenced by factors such as privatisation and an increasing role for 'social' or not-for-profit enterprises. There is a clear trend in many countries for SEOs to merge to form larger organisations, sometimes as a response to the shrinking of manufacturing. The merger process has, in a number of cases, created 'super' SEOs covering a number of related sectors. However, alongside the tendency for mergers to reduce the number of SEOs, new SEOs are being created in new or growing sectors, such as ICT and consultancy, or in newly deregulated or privatised branches, such as postal services and electricity.

A key role for SEOs is direct engagement in sectoral collective bargaining, which is prevalent in some 55% of the countries examined, and present in a more limited form in a further 30% of countries. Where the company is the main bargaining level, or where company bargaining occurs alongside or within the framework of higher-level bargaining, SEOs in many cases provide support to member companies in the process, although they rarely coordinate company-level bargaining explicitly. A decentralisation of bargaining in many countries, driven by companies' wishes for greater flexibility, has led to several types of response by SEOs. A few have ceased to engage in sectoral bargaining at all, or allowed companies to be members without being covered by agreements signed by the SEO; the most common approach, however, has been to allow greater scope for company-level flexibility in sectoral agreements. These SEOs have thus surrendered part of their bargaining authority in order to retain their relevance and avoid membership losses.

There has been little reported recent change in SEOs' other roles, which include involvement in sector-level tripartite and/or bipartite consultation and dialogue arrangements, lobbying and service provision. In only a few cases is there evidence that a weakening of SEOs' bargaining role has clearly led to a strengthening of their activities in other areas.

Employer organisations at subnational level exist in many countries and provide representation and services to member companies at this level. However, they rarely play a very important role in the industrial relations arena, except in countries with devolved political structures, such as Belgium, Germany, Italy and Spain.

Company type has long been an organising principle for employers, with around half of the countries examined having separate NPEOs (often with sectoral affiliates) for SMEs and/or crafts, and several having such structures for cooperatives.

Aside from sector, geographical unit or company type, this study also looked at whether organisations are emerging that group employers on other, 'non-traditional' lines. The overall conclusion is that specific organisations for women entrepreneurs and business owners, and for companies run by people of recent immigrant origin, exist in many countries (with the former being more frequent) and have become more common in recent times. However, there is no evidence that these organisations act as employer organisations or deal extensively with employment matters. In terms of employment issues, the most relevant 'non-traditional' organisations are those that group employers around a commitment to CSR. These exist in many countries and often deal with employment-related issues, and may influence behaviour among their members and more widely. The same is true for organisations that have been created to focus employers' concerns on specific equality and diversity issues. Another common factor – the nationality of company ownership – is the basis for business organisations in several countries that represent foreign investors and have an important influence on employment and industrial relations issues.

To summarise, most European countries have a strong, multi-level network of employer organisations with an important role and influence in many areas of economic and social life. Their structures, while diverse, are largely stable, especially at peak level, although with some exceptions in CEECs, where they are still developing and are in some cases rather fragmented. Employer organisations appear to have largely maintained or even increased their membership levels, by adapting to their members' changing needs where necessary. However, there is one area where change has been slow – that is, in terms of the general underrepresentation of women and people from ethnic minority groups among the leaderships of employer organisations.

Annex: National peak employer organisations

National peak employer organisations referred to in report

Country	Abbreviation	Full name of organisation
Austria (AT)	IV	Federation of Austrian Industry (Industriellenvereinigung)
	WKÖ	Austrian Federal Economic Chamber (Wirtschaftskammer Österreich)
Belgium (BE)	FEB/VBO	Federation of Enterprises in Belgium (Fédération des Entreprises de Belgique/Verbond van Belgische Ondernemingen)
	UCM	Union of Small Firms and Traders (Union des classes moyennes)
	UNISOC	Union of For-Profit Social Enterprises (Union des entreprises à profit social/Unie van socialprofitondernemingen)
	UNIZO	Union of Independent Entrepreneurs (Unie van Zelfstandige Ondernemers)
Bulgaria (BG)	BCCI	Bulgarian Chamber of Commerce and Industry (Българска търговско промишлена палата)
	BIA	Bulgarian Industrial Association – Union of the Bulgarian Business (Българска стопанска камара – Съюз на българския бизнес)
	BICA	Bulgarian Industrial Capital Association (Асоциация на индустриалния капитал в България)
	CEIBG	Confederation of Employers and Industrialists in Bulgaria (Конфедерация на работодателите и индустриалците в България)
	UPBE	Union of Private Bulgarian Entrepreneurs ‘Vazrazhdane’ (Български съюз на частните предприемачи ‘Възраждане’)
	UPEE	Union for Private Economic Enterprise (Съюз за стопанска инициатива)
Cyprus (CY)	KEBE	Cyprus Chamber of Commerce and Industry (Κυπριακό Εμπορικό και Βιομηχανικό Επιμελητήριο)
	OEB	Employers’ and Industrialists’ Federation (Ομοσπονδία Εργοδοτών και Βιομηχάνων)
Czech Republic	KZPS	Confederation of Employers’ and Entrepreneurs’ Associations of the Czech Republic (Konfederace

Country	Abbreviation	Full name of organisation
(CZ)		zaměstnavatelských a podnikatelských svazů ČR
	SP ČR	Confederation of Industry of the Czech Republic (Svaz průmyslu a dopravy ČR)
Denmark (DK)	DA	Confederation of Danish Employers (Dansk Arbejdsgiverforening)
	FA	Danish Employers' Association for the Financial Sector (Finansektorens Arbejdsgiverforening)
	SALA	Danish Confederation of Employers' Associations in Agriculture (Sammenslutningen af Landbrugets Arbejdsgiverorganisationer)
Estonia (EE)	ETTK	Estonian Employers' Confederation (Eesti Töoandjate Keskkliit)
Finland (FI)	EK	Confederation of Finnish Industries (Elinkeinoelämän keskusliitto)
Germany (DE)	BDA	German Confederation of Employers' Associations (Bundesvereinigung der Deutschen Arbeitgeberverbände)
	ZDH	German Confederation of Skilled Crafts (Zentralverband des Deutschen Handwerks)
Greece (EL)	ESEE	National Confederation of Hellenic Commerce (Εθνική Συνομοσπονδία Ελληνικού Εμπορίου)
	GSEVEE	Hellenic Confederation of Professionals, Craftsmen and Merchants (Γενική Συνομοσπονδία Επαγγελματιών Βιοτεχνών Εμπόρων Ελλάδας)
	SEV	Hellenic Federation of Enterprises (Σύνδεσμος Επιχειρήσεων και Βιομηχανιών)
Hungary (HU)	ÁFEOSZ	National Federation of Consumer Cooperatives (Általános Fogyasztási Szövetkezetek Országos Szövetsége)
	AMSZ	Agrarian Employers' Federation (Agrár Munkaadói Szövetség)
	IPOSZ	National Federation of Craftsmen Boards (Ipartestületek Országos Szövetsége)
	KISOSZ	National Federation of Traders and Caterers (Kereskedők és Vendéglátók Országos Érdekképviseleti Szövetsége)
	MGYOSZ	Confederation of Hungarian Employers and Industrialists (Munkaadók és Gyáriparosok Országos Szövetsége)
	MOSZ	National Federation of Agricultural Cooperatives

Country	Abbreviation	Full name of organisation
		and Producers (Mezőgazdasági Szövetkezők és Termelők Országos Szövetsége)
	OKISZ	Hungarian Industrial Association (Magyar Iparszövetség)
	STRATOSZ	National Association of Strategic and Public Utility Companies (Stratégiai és Közszolgáltató Társaságok Országos Szövetsége)
	VOSZ	National Association of Entrepreneurs and Employers (Vállalkozók és Munkáltatók Országos Szövetsége)
Ireland (IE)	CI	Chambers Ireland
	IBEC	Irish Business and Employers' Confederation
	ISME	Irish Small and Medium Enterprises Association
	SFA	Small Firms Association
Italy (IT)	AGCI	General Association of Italian Cooperatives (Associazione Generale Cooperative Italiane)
	CIA	Confederation of Italian Farmers (Confederazione Italiana Agricoltori)
	CLAAI	Confederation of Italian Free Crafts Associations (Confederazione delle Libere Associazioni Artigiane Italiane)
	CNA	National Confederation for the Craft Sector and Small and Medium Enterprise (Confederazione Nazionale dell'Artigianato e della Piccola e Media Impresa)
	Coldiretti	National Confederation of Farmer (Confederazione Nazionale Coltivatori Diretti)
	Confagricoltura	General Confederation of Italian Agriculture (Confederazione Generale dell'Agricoltura Italiana)
	Confapi	Italian Confederation of Small and Medium-sized Industry (Confederazione italiana della piccola e media industria)
	Confartigianato	General Italian Confederation of Artisans (Confederazione Generale Italiana dell'Artigianato)
	Confcommercio	General Italian Confederation of Commerce and Tourism (Confederazione Generale Italiana del Commercio e del Turismo)
	Confcooperative	Confederation of Italian Cooperatives (Confederazione Cooperative Italiane)

Country	Abbreviation	Full name of organisation
	Confesercenti	Italian Confederation of Commerce, Tourism and Service Activities (Confederazione italiana esercenti attività commerciali, turistiche e dei servizi)
	Confindustria	General Confederation of Italian Industry (Confederazione Generale dell'Industria Italiana)
	Legacoop	National League of Cooperatives and Mutuals (Lega nazionale delle Cooperative e mutue)
	UNCI	National Union of Italian Cooperatives (Unione Nazionale Cooperative Italiane)
Latvia (LV)	LDDK	Latvian Confederation of Employers (Latvijas Darba Devēju Konfederācija)
Lithuania (LT)	LPK	Lithuanian Confederation of Industrialists (Lietuvos pramoninkų konfederacija)
	LVDK	Lithuanian Business Employers' Confederation (Lietuvos verslo darbdavių konfederacija)
Luxembourg (LU)	UEL	Union of Luxembourg Companies (Union des Entreprises Luxembourgeoises)
Malta (MT)	GRTU	Malta Chamber of Small and Medium Enterprises
	MCCEI	Malta Chamber of Commerce, Enterprise and Industry
	MEA	Malta Employers' Association
Netherlands (NL)	LTO-Nederland	Dutch Federation of Agriculture and Horticulture (Land en Tuinbouworganisatie-Nederland)
	MKB-Nederland	Dutch Federation of Small and Medium-sized Enterprises (Midden en Klein Bedrijf-Nederland)
	VNO-NCW	Confederation of Netherlands Industry and Employers (Verbond van Nederlandse Ondernemingen and Nederlands Christelijk Werkgeversverbond)
Norway (NO)	HSH	Federation of Norwegian Commercial and Service Enterprises (Handels- og Servicenæringens Hovedorganisasjon)
	NHO	Confederation of Norwegian Enterprise (Næringslivets Hovedorganisasjon)
Poland (PL)	BCC	Business Centre Club
	KP	Confederation of Employers 'Lewiatan' (Konfederacja Pracodawców 'Lewiatan')
	KPP	Confederation of Polish Employers (Konfederacja

Country	Abbreviation	Full name of organisation
		Pracodawców Polskich)
	PKPP	Polish Confederation of Private Employers 'Lewiatan' (Polska Konfederacja Pracodawców Prywatnych 'Lewiatan')
	ZRP	Polish Crafts Union (Związek Rzemiosła Polskiego)
Portugal (PT)	CAP	Confederation of Farmers of Portugal (Confederação dos Agricultores de Portugal)
	CCP	Confederation of Trade and Services of Portugal (Confederação do Comércio e Serviços de Portugal)
	CIP	Confederation of Portuguese Industry (Confederação da Indústria Portuguesa)
	CTP	Confederation of Portuguese Tourism (Confederação do Turismo Português)
Romania (RO)	ARACO	Romanian Association of Building Entrepreneurs (Asociația Română a Antreprenorilor din Construcții)
	CNIPMMR	National Council of Private Small and Medium Enterprises (Consiliul Național al Întreprinderilor Private Mici și Mijlocii din România)
	CNPR	National Confederation of Romanian Employers (Confederația Națională a Patronatului Român)
	CONPIROM	Employer Confederation of Romanian Industry (Confederația Patronală din Industria României CONPIROM)
	CoNPR	National Council of Romanian Employers (Consiliul Național al Patronilor din România)
	CP CONCORDIA	CONCORDIA Employers' Confederation (Confederația Patronală CONCORDIA)
	CPISC	Employers' Confederation for Industry, Services and Commerce (Confederația Patronală a Industriei, Serviciilor și a Comerțului)
	PNR	Romanian National Employers (Patronatul Național Român)
	PR	Romanian Employers (Patronatul Român)
	UGIR	General Union of Romanian Industrialists (Uniunea Generală a Industriașilor din România)
	UGIR 1903	General Union of Romanian Industrialists 1903 (Uniunea Generală a Industriașilor din România)

Country	Abbreviation	Full name of organisation
		1903)
	UNPCPR	National Union of Employers with Private Capital in Romania (Uniunea Națională a Patronatelor cu Capital Privat din România)
	UNPR	National Union of Romanian Employers (Uniunea Națională a Patronatului Român)
Slovakia (SK)	AZZZ SR	Federation of Employers' Associations (Asociácia zamestnávateľských zväzov a združení Slovenskej republiky)
	RUZ SR	National Union of Employers (Republiková únia zamestnávateľov Slovenskej republiky)
Slovenia (SI)	GZS	Chamber of Commerce and Industry of Slovenia (Gospodarska zbornica Slovenije)
	OZS	Chamber of Craft and Small Businesses of Slovenia (Obrtno-podjetniška zbornica Slovenije)
	TZS	Slovenian Chamber of Commerce (Trgovinska zbornica Slovenije)
	ZDODS	Slovenian Employers' Association of Crafts (Združenje delodajalcev obrtnih dejavnosti Slovenije)
	ZDS	Slovenian Employers' Association (Združenje delodajalcev Slovenije)
Spain (ES)	CEOE	Spanish Confederation of Employers' Organisations (Confederación Española de Organizaciones Empresariales)
	CEPYME	Spanish Confederation of Small and Medium-sized Enterprises (Confederación Española de la Pequeña y Mediana Empresa)
Sweden (SE)	Arbetsgivaralliansen	Swedish Employers' Alliance
	Idea	Arbetsgivarförbundet för ideella organisationer
	KFO	Cooperative Movement Bargaining Organisation (Kooperationens Förhandlingsorganisation)
	KFS	Municipality Companies' Cooperative Organisation (Kommunala Företagens Samorganisation)
	Pacta	Employers' Association of Local Federations of Local Authorities and Enterprises
	SAO-Småföretagarna	SAO-Small Businesses

Country	Abbreviation	Full name of organisation
	<u>Sinf</u>	Swedish Industry Association (<u>Svensk Industriförening</u>)
	<u>SN</u>	Confederation of Swedish Enterprise (<u>Svenskt Näringsliv</u>)
United Kingdom (UK)	<u>CBI</u>	<u>Confederation of British Industry</u>

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