RESEARCH REPORT

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Footwear sector

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Eurofound

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

The aim of this representativeness study is to identify the relevant national and EU-level social partners (that is, the trade unions and employer organisations) in the footwear sector, and to show how the national organisations relate to the sector's European interest organisations for both workers and employers.

The impetus for this study, and for similar studies in other sectors, arises from the aim of the European Commission to identify the representative social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) and to be eligible for participation in European sectoral social dialogue committees (ESSDCs).

The report is divided into five parts, beginning with this introduction. Chapter 1 gives an overview of the economic specificities of and employment trends in the footwear sector. Chapter 2 analyses the social partner organisations in the 23 EU Member States in which footwear is produced. No significant footwear-manufacturing activities can be found in Cyprus, Ireland ([1]), Luxembourg or Malta, so these Member States have not been covered in the current report. Chapter 3 analyses the representativeness of the relevant European organisations, in particular their membership composition and capacity to negotiate. Finally comes the conclusion.

The following sections present the objectives of the study, a brief overview of European social dialogue in the footwear sector and a short introduction to the chosen methodology.

0.1. Objectives of the study

Representativeness studies are conducted for four reasons:

- the European Commission aims to confirm the representativeness of the social partner organisations consulted under Article 154 of the TFEU;
- representativeness is a criterion for eligibility to set up or participate in an ESSDC;
- representativeness also means having the capacity to negotiate agreements that can be implemented by Council decision, as provided for by Article 155 of the TFEU;
- this study can also offer guidance for future capacity-building initiatives.

Representativeness is defined by the European Commission Decision of 20 May 1998 on the establishment of sectoral social dialogue committees promoting the dialogue between the social partners at European level (Decision 98/500/EC). For an organisation to be recognised as a representative EU social partner organisation, it must:

- relate to specific sectors or categories and be organised at the European level;

([1]) The footwear sector had a relatively strong tradition in Ireland in the past, with several large shoe companies and shoemakers/cobblers. Nowadays it is virtually non-existent, since the largest footwear companies (Dubarrys and Clarks) moved production overseas. There is still some activity in niche markets (like orthopaedic shoes and dancing shoes), but on a small scale. Based on desk research and direct contact with footwear companies, only one business in the footwear reports that it has more than 10 employees. Due to the very small scale of the sector, it was not possible to obtain further information about the characteristics of the remaining workforce.

- represent organisations that are themselves an integral and recognised part of Member States' social partner structures, that have the capacity to negotiate labour agreements and that are representative of several Member States;
- have adequate structures to ensure its effective participation in the work of an ESSDC.

To accomplish its aims, this study first identifies the relevant national social partner organisations in the footwear sector, before analysing the structure of the sector's relevant European organisations, in particular their membership composition.

0.2. Historical background of the footwear ESSDC

As mentioned in the previous representativeness study for the footwear sector, published in 2017, the ESSDC for the footwear industry was established in 1999 in response to a joint request from the European Trade Union Federation of Textiles, Clothing and Leather, now known as industriAll European Trade Union (industriAll Europe), and the European Confederation of the Footwear Industry (CEC).

Since its establishment, industriAll Europe and CEC have produced a number of joint texts within the framework of social dialogue (Table 1).

Table 1: Joint texts of the European social partners participating in the footwear ESSDC

Date	Topic of the joint opinion or agreement
4 June 2024	TCLF [textiles, clothing, leather and footwear] social partners' priorities for the next European mandate (2024–2029)
9 July 2020	Joint declaration on the economic impact of COVID-19 on the textile, clothing, leather and footwear industries
17 November 2000	Code of conduct – A charter of the social partners in the footwear sector
2 June 2000	Programme d'action sociale: contribution des partenaires sociaux du secteur de la chaussure (lettre) (in French only) [Social action programme: Contribution of the social partners in the footwear sector (letter)]
7 March 2000	Lisbon Summit: Contribution of the social partners of the European footwear industry
8 June 1999	Impact of the financial crises in Asia and Russia on the fashion industry
25 May 1999	Social dialogue in the clothing, textile and footwear sector
21 October 1997	Charter on child labour
13 September 1996	Child labour – A charter by European social partners in the footwear sector

Source: European Commission, Social dialogue texts database, checked June 2025.

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity. These criteria are defined successively in this section.

Sector-relatedness

Sector-relatedness refers to the demarcation of the footwear sector in agreement with the social partners and the European Commission. When analysing the ways trade unions and employer organisations relate to the sector, this must include the extent to which their membership domains cover all types of workers in all types of companies in all types of activities in the sector. How the sector is defined is crucial for the assessment of sector-relatedness.

Every sector is demarcated in terms of Statistical Classification of Economic Activities in the European Community (NACE) (Rev. 2) codes. All existing sectoral social dialogue committees have been demarcated with a NACE code, which defines the scope of economic activities covered by the committee. The NACE code to be applied in each sectoral representativeness study is confirmed by the European Commission after consultation with the social partners.

In this study, the footwear sector is defined as embracing NACE (Rev. 2) code 15.20 'manufacture of footwear', which includes the following activities:

- manufacture of leather parts of footwear,
- manufacture of footwear for all purposes, of any material, by any process, including moulding,
- manufacture of uppers and parts of uppers, outer and inner soles, heels, etc.,
- manufacture of gaiters, leggings and similar articles.

This study focuses on European and national organisations.

European organisations are analysed using the top-down approach if they:

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

The Commission may decide to include other EU sector-related organisations in the study, if relevant (for example if a sector-related organisation asks to be consulted, under Article 154 of the TFEU).

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

A. the association's domain relates to the sector; and
B. the association is either:
    - affiliated to a European-level organisation, which is analysed in the study within the top-down approach (regardless of its involvement in collective bargaining), or, if not,
    - regularly involved in sector-related collective bargaining.

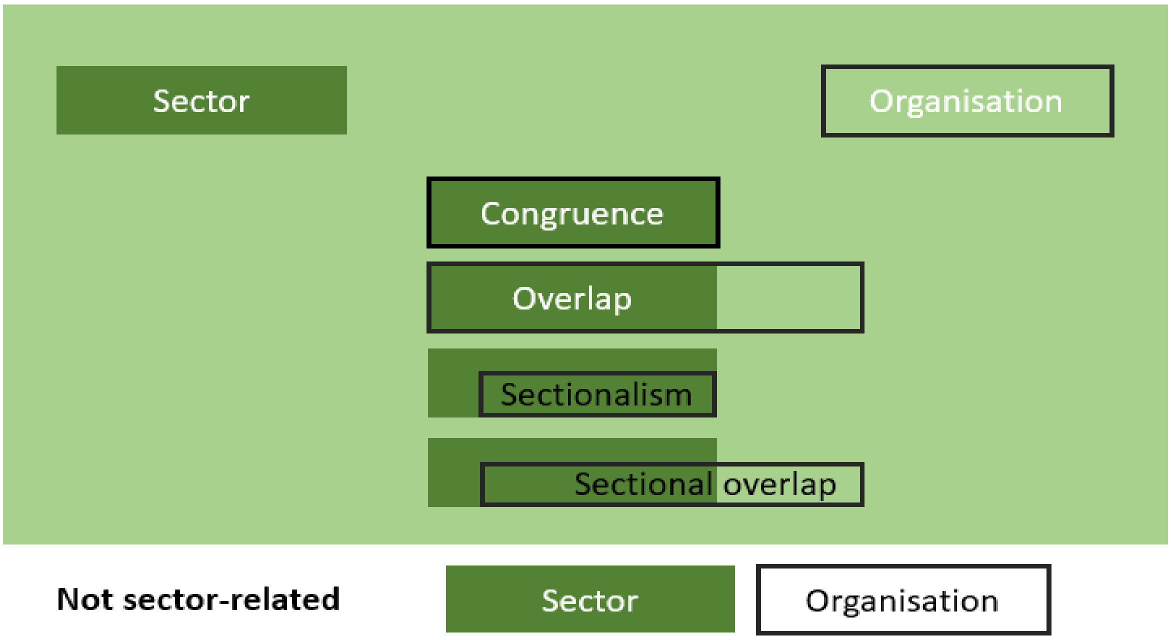
Table 2 and Figure 1 show the membership domain patterns that can exist. The membership domains of trade unions and employer organisations can be exactly in line with the demarcation of the sector (that is, covering all activities in NACE 15.20); this type of sector-relatedness is called 'congruence'. If the membership domain of an organisation goes beyond the footwear sector as defined here, it is categorised as 'overlapping'. 'Sectionalism' is a type of sector-relatedness whereby an organisation covers part of the sector and nothing else, whereas organisations that fall into the category of 'sectional overlap' cover part of the sector and also have members in other sectors.

Table 2: Membership domain patterns of an organisation

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the trade union / employer organisation cover potentially all employees/companies in the sector?	Does the trade union / employer organisation also potentially represent employees/companies outside the sector?
Congruence	Yes	No
Overlap		Yes
Sectionalism	No	No
Sectional overlap		Yes

Source: Eurofound.

Figure 1: Four different types of sector-relatedness



Source: Eurofound.

Membership

Membership is another important aspect of representativeness. This study looks at two levels of membership: first, the geographical coverage of the EU-level organisations (for instance how many Member States an EU-level trade union or employer organisation has affiliates in) and, second, the organisational density (that is, the number of members who are employees as a percentage of the total number of employees in a given industry or Member State) of the national affiliates. Important aspects to be assessed are whether the EU-level players organise most, or at least the most significant, national-level players (significant in relation to their membership strength in the sector and their involvement in collective bargaining) and whether there are any major gaps in their membership domains.

Membership of a social partner organisation requires the payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Considering the limits of transparency, this study does not always distinguish between different membership statuses. Where possible, indirect membership (such as membership through another organisation to which the employer organisation or trade union is affiliated) is considered in this report.

Organisational capacity

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

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

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

Finally, representativeness also depends upon the organisations' structures and resources, their capacity to encourage the active participation of their members and combine the different interests of member organisations, and their potential to act autonomously at the European level. Effective participation in the footwear ESSDC is assessed in terms of presence at the meetings during 2022, 2023 and 2024.

0.4. Data collection and quality control measures

Data collection

Representativeness studies combine top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of industriAll Europe and CEC, while the bottom-up approach looks at the organisations bringing together employees or employers and/or involved in sector-related collective bargaining and social dialogue in the Member States and their membership of European-level organisations.

Except where otherwise stated, this study draws on the country-level studies provided by the Network of Eurofound Correspondents (listed in the Annex). Where precise data were not available, estimates were used. Thus, quantitative data (such as those used to calculate density rates) may stem from any of the following sources:

- official statistics and representative survey studies,
- administrative data, such as membership figures provided by the organisations,
- estimates, expert opinions and assessments from the Network of Eurofound Correspondents or representatives of the organisations.

Other sources used in this report include the European Commission's social dialogue texts database and the articles of association of the EU-level organisations.

The information used in this study was collected by the Network of Eurofound Correspondents in a series of 25 national contributions. The national correspondents are required to gather data on all relevant national-level organisations and to approach them by telephone or email, using standardised questionnaires. While the questionnaires are in English, correspondents can interview or contact the organisation in the relevant national language. The questionnaires are completed by the national correspondents.

Quality assurance

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

First, between February and April 2024, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and on other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents. The information was subsequently checked by the authors of the report. Where necessary, the national correspondents were asked to revise the national reports. Based on these collected data, an overview report was drafted by the authors between August and November 2024.

A first, informal, (pre-evaluation) consultation between the Directorate-General for Employment, Social Affairs and Inclusion and the European-level sectoral social partners identified in the report was carried out between January and April 2025. Based on the comments received, the draft report was finalised and submitted for formal written evaluation by the Eurofound Advisory Committee on Industrial Relations, the European-level sectoral social partners identified in the report and the directorate-general between April and May 2025. Following this evaluation, final corrections were made, and the report was edited and published on the Eurofound website.

During this process, all relevant players and organisations mentioned in the report were invited to check the consistency of the information included in it, thereby ensuring that the bottom-up approach included all the relevant sector-related organisations from each Member State. As different social partner organisations were able to view the information reported by other organisations in the same Member State and, if necessary, comment on the credibility or accuracy of the information on other organisations representing a similar membership, this process involved an element of mutual control and recognition.

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

1. Background and employment specificities in the sector

In 2022, more than 16 500 firms and 226 650 workers (including self-employed) in the EU were active in the European footwear sector as captured by NACE code 15.20, according to Eurostat's Structural Business Statistics (SBS). That represents a relatively small fraction of the total production in the EU manufacturing sector (0.3 % in the EU-27, ranging from 0.01 % in Belgium and Sweden to slightly more than 2 % in Portugal). Approximately 85 % of the total footwear production in the EU-27 is concentrated in Germany, Italy, Portugal and Spain, with Italy alone producing more than half of the total EU volume (SBS data, 2022). The size of the footwear sector shows marked differences between Member States ([2]). No significant footwear-manufacturing activities can be found in Cyprus, Ireland, Luxembourg and Malta. Therefore, these Member States have not been covered in this report, which covers only 23 Member States ([3]).The footwear sector is very small in Belgium, Denmark (mostly design and warehousing of products), Estonia, Latvia, Lithuania and Sweden, with fewer than 100 companies (except for Belgium, where 110 companies operate in the sector, including solo self-employed workers) and 350 workers each. Table 3 presents an overview of the size of the footwear sector in Member States, in terms of number of companies, total employment and net turnover. Four Member States account for more than 70 % of the total EU-27 workforce in the sector: Italy (72 336 workers, 6 381 companies and a net turnover of EUR 15 706 million), Portugal (39 370 workers, 2 427 companies and EUR 2 619 million turnover), Spain (23 510 workers, 3 042 companies and EUR 3 167 million turnover) and Romania (24 455 workers, 728 companies and EUR 888 million turnover).

Since the 1990s, the European footwear industry has been steadily declining in terms of the numbers of companies and workers, and in the volume of output, due to the relocation of production to lower-cost countries and company closures, related to increasing competition from China and East Asian countries. Czechia and Hungary experienced a rapid decline in the production of footwear after the collapse of post-Soviet market links, but after 2011 Czech companies in the sector started focusing on products with higher value added (barefoot shoes, orthopaedic shoes, bespoke shoes, safety shoes, etc.), resulting in increased sales. Increasing specialisation in niche products and higher value-added segments of the footwear-manufacturing sector also characterises other Member States, such as Austria, Czechia (barefoot), Finland (protective footwear), Germany (protective footwear), Hungary (comfort and orthopaedic shoes, custom-made and quality sneakers) and Latvia (orthopaedic shoes, large shoes and slippers). Moreover, challenging working conditions, relatively low wages (mentioned as factors in Austria, Bulgaria and Croatia) and a general lack of interest in working in the sector (mentioned in Croatia, Hungary and Slovakia) are reported as possible drivers of the downward trend

([2]) The scope of the footwear sector also differs across countries. Shoe repair activities are considered part of the sector in Austria (only in the artisanal branch of the sector), Croatia, Czechia, Greece, Italy, Latvia, Lithuania, the Netherlands, Poland, Spain and Sweden. The manufacturing of finished leather goods is considered part of the footwear sector only in Belgium (where the leather and tanning sector and the footwear sector have been merged), Bulgaria and Sweden (only shoe components in leather), while there is some sectoral overlap in Germany and Portugal with respect to social partners. In Lithuania, the manufacturing of finished leather goods does not happen.

([3]) Where SBS data are available for Ireland, these have been included, but no trade unions or employer organisations have been identified for this country.

observed in the volume of the footwear production sector. Such an overall trend observed in employment and the number of companies in the footwear sector in the EU is in stark contrast with a relatively flat pattern observed for the whole of manufacturing over the last 15 years (SBS historical data).

Table 3: Overview of the sector in terms of number of companies, employment and turnover 2022

Member State	Companies	Total employment	Net turnover (million EUR)
EU-27 ([a])	16 600	226 655	29 055.00
AT	105 ([b])	1 399 ([b])	n.d.
BE	110 ([a])	158 ([c])	24.87 ([b])
BG	241	6 429	111.59
CZ	245 ([4])	1 549	87.70
DE	368	9 839	3 137.94
DK	23	79	25.66
EE	22	331	24.81
EL	432 ([a])	1 383 ([a])	84.28
ES	3 042 ([b])	23 510 ([b])	3 167.36
FI	75	722 ([d])	255.19
FR	165 ([e])	3 063	403.45
HR	111	5 186	141.90 ([b])
HU	251	4 254	171.30
IE	13 ([c])	119 ([c])	24.94 ([b])
IT	6 381 ([f])	72 336	15 705.72
LT	14 ([e])	224 ([e])	12.51
LV	16 ([b])	132 ([b])	1.93
NL	117 ([f])	1 350 ([f])	204.12
PL	1 200 ([g]) ([5])	11 997 ([g])	611.68
PT	2 427	39 370	2 618.82
RO	728	24 455	888.42
SE	73 ([h])	101 ([h])	23.43
SI	96	1 080	127.67

([4]) Figures provided by COKA from IBISWorld report 245 companies in the sector in 2022.
([5]) The Central Statistical Office in Poland reports 2 746 companies specialising in footwear production.

Member State	Companies	Total employment	Net turnover (million EUR)
SK	334	6 606	629.59

([a]) Reference year is 2020.

([b]) Reference year is 2021.

([c]) SBS data for 2021.

([d]) Data are from Statistics Finland and refer full-time equivalents (total work input of employees, expressed as the equivalent number of full-time employees. Data provided by the trade union representative report 1 200 units.

([e]) Reference year is 2024.

([f]) SBS data for 2022; Network of Eurofound Correspondents data are not entirely reliable, as they exclude firms with no employees, which account for a significant fraction of the Italian footwear sector.

([g]) SBS data for 2022.

([h]) Reference year is 2023.

Note: Data on solo self-employed workers (where available) are added either to the number of companies (for Belgium, Czechia, Denmark, Hungary, Slovakia and Slovenia) or to total employment (for Bulgaria), depending on how self-employed workers are considered in the Member State. For Member States that reported self-employed workers both among companies and in employment (Croatia, Finland, Greece, Portugal, Spain and Sweden), we added the number to companies, to ease comparability with Table 12 and Table 17. No self-employed workers are present in the Romanian footwear sector, according to the Network of Eurofound Correspondents.

Sources: National statistics provided by Eurofound's Network of European Correspondents for the number of companies and total employment (except for Belgium, Ireland, Italy and Poland) and Eurostat SBS (for net turnover).

The downward trend in employment is common to 19 of the 22 Member States for which data are available (see Table 4). For some Member States – such as Bulgaria, Estonia and Romania – the reduction of the footwear production sector in terms of employment has been particularly severe (above 50 % in less than a decade), while for the largest share of Member States (Belgium, Czechia, Finland, France, Hungary, Latvia, Lithuania and Poland) total employment fell by more than 30 %. Different patterns are observed in Austria (where the sector shrank between 2000 and 2010 and remained relatively stable over the decade leading up to 2022), Germany (which recorded a 4.6 % increase in employment between 2014 and 2022) and the Netherlands (where employment increased by around 35 %). Moreover, in Germany, total turnover increased by 36 % between 2008 and 2018, and started to recover significantly after the COVID-19-related contraction. From 2010 until 2017, the Portuguese footwear industry registered steady growth in the number of companies (+ 25 %) and total turnover (+ 36 %), followed by a 15 % decrease in the number of companies between 2017 and 2022. Employment and total turnover experienced a similar trend, though with an increase in 2022 (the level of total employment being 6 % higher than in 2010). The French, Greek, Polish and Romanian footwear sectors were also hit particularly hard by the COVID-19 pandemic, with only Greece showing signs of recovery. Romania represents a particularly interesting case, as the recent changes in the Romanian labour market (increase in the minimum wage and labour shortages) together with the pandemic contributed to a significant drop in employment (– 37 % between 2018 and 2022).

Table 4: Change in employment in the sector between 2014 and 2022

Member State	Total employment, 2014	Total employment, 2022	Change in employment (%)
AT	1 446 ([a])	1 399 ([b])	– 3.2
BE	262	158 ([c])	– 39.7
BG	13 570	6 429	– 52.6
CZ	2 251	1 549	– 31.2
DE	9 405	9 839	4.6
DK	59	79	34
EE	750	331	– 55.9
EL	1 866	1 627 ([b])	– 12.8
ES	29 493	24 545 ([d])	– 16.8
FI	1 145	722 ([e])	– 36.9
FR	5 498	3 063	– 44.3
HR	6 368 ([a])	5 200	– 18.3
HU	7 242	4 254	– 41.3
IE	n.d.	119 ([e])	n.d.
IT	79 948	72 336	– 9.5
LT	443	224	– 49.4
LV	225	132	– 41.3
NL	703	807 ([e])	34.7
PL	18 643	11 997 ([e])	– 35.6
PT	46 140	40 270	– 12.7
RO	52 591	24 455	– 53.5
SE	n.d.	101	n.a.
SI	1 427	1 080	– 24.3
SK	8 716	6 606	– 24.2

([a]) Network of Eurofound Correspondents data from previous representativeness study (SBS data not available).

([b]) Reference year is 2020.

([c]) SBS data for 2022 (2021 for Belgium and Ireland).

([d]) Reference year is 2021.

([e]) Data are from Statistics Finland and refer to person-years. Data provided by the trade union representative report 1 200 units.

Notes: Data on self-employed workers are added to the 2022 figures, where available (see note to Table *3* for more details). n.d., no data.

Source: SBS data for total employment in 2014 (except for Austria and Croatia) and national statistics provided by the Network of Eurofound Correspondents for total employment in 2022 (except for Belgium, the Netherlands, Ireland and Poland).

1.1. Workforce characteristics in the sector

Demographic characteristics

Of Member States for which data are available, some have a higher share of women active in the footwear sector (ranging between 54 % in Denmark and 85 % in Croatia), with a few Member States showing an almost equal proportion of male and female workers (Figure 2 and

Table 5). Conversely, 95 % of footwear production in Greece is by male workers, and relatively larger shares of men are also reported in Austria (70 % in artisanal activities and 63 % in industry).

Figure 2: Gender distribution of employment in the sector (%)

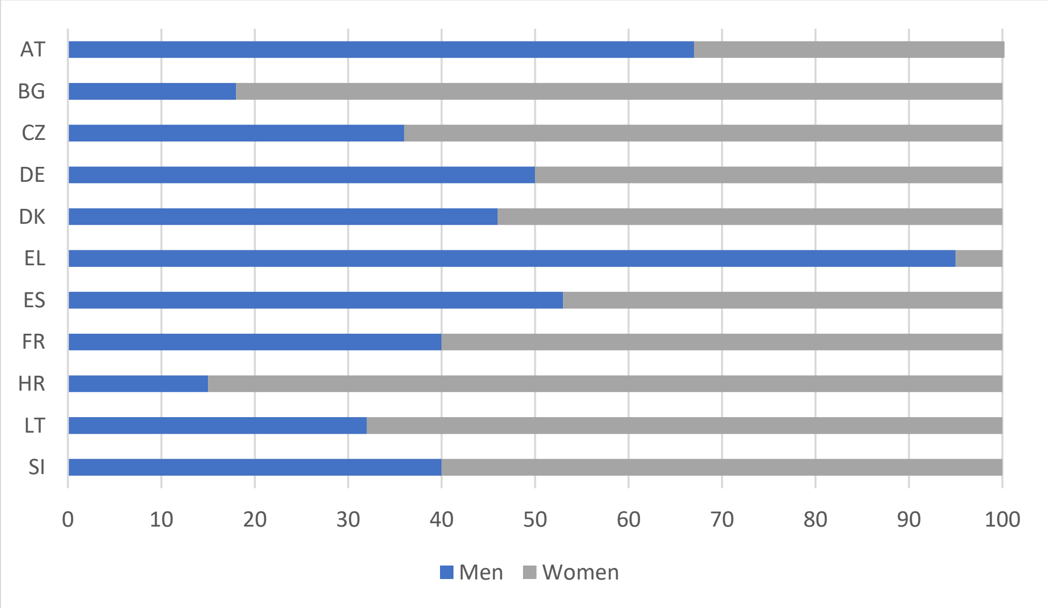


Table 5: Gender distribution of employment in the sector

Member State	Men (%)	Women (%)
AT	60 in artisanal branch 73 in industrial branch	40 in artisanal branch 27 in industrial branch
BG	18	82
CZ	36	64
DE	50	50
DK	46	54
EL	95	5
ES	53	47
FR	40	60
HR	15	85
LT	32	68
SI	40	60

Note: Data are not available for Belgium, Estonia, Ireland, Italy (only data for the leather and tanning sector are available), Latvia, the Netherlands, Poland, Portugal (only data for the aggregate NACE 13–15 are available), Slovakia and Sweden. In Finland the proportion of women is slightly higher; In Hungary the Network of Eurofound Correspondents report a higher share of women with respect to the whole textiles, clothing, leather and footwear aggregate; in Romania women represent the majority of the workforce in the sector.

Source: National statistics provided by Network of Eurofound Correspondents.

Data on the age breakdown of workers at the three-digit NACE level are available only for 14 of the 27 Member States and suggest that most workers are within the 36–55 age range. In some Member States, the 55+ age cohort is overrepresented (in Bulgaria, Germany and Slovenia workers aged 55 or older account for more than 25 % of the sectoral workforce, reaching 95 % in Greece). In Hungary and Spain, the average age is above 45 years old (in Hungary most workers are concentrated in the 45–60 age group; there is also a significant part of the workforce that has already reached retirement age), and the sector appears to be characterised by a decreasing generational turnover, as fewer young people enter the sector. The same trend also characterises the footwear sector in Estonia, where the number of new entrants, especially among young people, is steadily decreasing, suggesting an ageing workforce. In general, the footwear sector appears to struggle to attract young workers in several Member States (for example Bulgaria, Croatia and Czechia), which is also reflected in the decline in the enrolment of students in sectoral educational programmes (Croatia, Estonia, Romania and Slovakia) and in the number of vocational training contracts (Germany).

Education levels and training in the footwear sector

Workers in the footwear sector are characterised by a high share of workers with low to intermediate levels of education, as the majority of the workforce have completed vocational training (associated with International Standard Classification of Education levels 3 and 4), while fewer than 10 % of workers have a university degree (except in France, where almost 20 % of the sectoral workforce has completed tertiary-level education). The share of workers with only primary education (levels 1 and 2) ranges between 14 % in Belgium and 48 % in France. The data for educational attainment also reflect the composition of the footwear production workforce in terms of occupations.

Workers in the footwear sector receive their education mainly in vocational schools, in 17 of the 19 Member States for which data are available. In Denmark the public educational programme was shut down in 2010 and no official training and certification are currently available in the sector ([6]), but some companies have developed internal programmes, while in Slovenia workers are mostly trained on the job, as no specific vocational schools are available for the footwear sector. On-the-job training and internal education programmes can also be found in several other Member States, such as Austria, Bulgaria, Finland (where it is prevalent), France, Italy and Portugal. Dual education programmes are available in Austria, Germany, Hungary (though with very stringent criteria that are often unmet by small firms, which represent the vast majority of the sector), Portugal, Romania and Spain, and used to be available in Slovakia (between 2015 and 2019), combining practical on-the-job training from an employer with compulsory attendance at a vocational training school for theoretical instruction.

In Spain, over the last decade, the increased relevance of sustainable practices in production, the integration of Industry 4.0 and the need for generational renewal led to a restructuring of vocational training, making it more attractive and responsive to the industry’s needs. A similar trend is observed in Greece, where new specialties in footwear design were introduced in vocational training institutions in 2024.

For the last 10 years, CEC has been very active in mobilising footwear stakeholders to participate in Erasmus+ projects, all of which have made an important contribution to providing relevant curricula and training material responding to industry needs (see projects at www.cec-footwearindustry.eu).

Moreover, coordinated and managed by the three European sector employer organisations the European Apparel and Textile Confederation (Euratex), CEC and the Confederation of National Associations of Tanners and Dressers of the European Community (COTANCE), three large Erasmus+ Blueprint projects are also contributing to modernising textile, clothing, leather and footwear education while strengthening private–public collaboration across Europe. These projects, starting with the first Blueprint Skills4Smart TCLF [textiles, clothing, leather and footwear] (2018 to 2022, www.s4tclfblueprint.eu), and currently Metaskills4TCLF (September 2023 to August 2027) and Aequalis4TCLF (February 2024 to January 2028), include(d) large numbers of industry, education, research and public stakeholders from 9, 11 and 7 Member States, respectively. They have an overall approach that includes the development of European and national upskilling and reskilling strategies; the development of innovative curricula and related training programmes with attractive learning tools such as AI and the metaverse; and a communication campaign to attract social, economic and political players without forgetting the promotion of social inclusion. University specialisations for the footwear sector also exist in eight Member States – Bulgaria, Czechia, Estonia, Hungary, Poland, Portugal, Slovakia and Slovenia – mostly focused on footwear design and technology. However, in Estonia insufficient practical learning opportunities and limited access to training (like apprenticeships within companies) often result in the lack of the necessary hands-on skills to join the labour market,

([6]) As well as in Denmark, the numbers of secondary and vocational schools have been decreasing in Czechia and Germany.

and additional on-the-job training is thus needed. Overall, some shortage of both skilled and unskilled workers in the sector is reported across Member States.

Contract types and self-employment

The available data on the other characteristics of the workforce suggest that standard forms of employment are prevalent in the footwear sector in most Member States. Self-employment is present in 19 of the 24 Member States for which data are available, with very different shares, ranging from 2 % in Portugal to 90 % in Finland.

On average, self-employment in 2021 represented around 6 % of total employment in the footwear sector of the EU-27 (

Table 6) ([7]). In 7 of the 24 Member States for which data are available, self-employed workers account for between 5 % and 10 % of the sectoral workforce (Austria, Czechia, France, the Netherlands, Poland ([8]), Spain and Sweden), and in 12 Member States even less than 5 % (Bulgaria, Croatia, Estonia, Finland, Germany, Hungary, Ireland, Latvia, Portugal, Romania, Slovakia and Slovenia). Conversely, self-employment is more widespread in Italy (10.7 %), Lithuania (12.3 %), Belgium (13.3 %), Denmark (15.5 %) and Greece (26 %). According to the Network of Eurofound Correspondents, in Lithuania most self-employed people in the sector work in shoe repair activities, and in Austria self-employment represents 25 % of the artisanal workforce (while only a few self-employed people work in the industrial branch of the footwear sector). In Finland, according to national data, solo self-employed workers account for 90 % of all the companies in the footwear and leather sectors (not included in the data presented in

Table 6), while most employees in larger companies work in standard forms of employment. Similarly, solo self-employed workers represent over 30 % of the companies in the Slovenian footwear sector (not included in the data presented in

Table 6). Overall, given the characteristics of footwear manufacturing, we can assume that a significant fraction of the self-employed work in artisanal activities (including as shoe repairers, where these are included in the sector).

Table 6: Self-employment in the footwear sector

Member State	Persons employed	Percentage self-employed
EU-27	226 655	5.9
AT	1 506	7.1
BE	158	13.3
BG	6 584	2.5
CZ	1 758	9.6

([7]) Data on self-employment from the Network of Eurofound Correspondents are often not available (for Austria, Estonia, Germany, Italy, Lithuania, Latvia, the Netherlands and Romania). In six Member States the number of solo self-employed workers is reported among companies (Belgium, Czechia, Denmark, Hungary, Slovakia and Slovenia), while in another six it is included both among companies and in total employment (Croatia, Finland, Greece, Portugal, Spain and Sweden).

([8]) In Poland, if shoe repair activities were taken into account, self-employment could be higher, since many of the 1 810 companies specialising in shoe repair are one-person businesses.

Member State	Persons employed	Percentage self-employed
DE	11 594	1.7
DK	71	15.5
EE	400	2.8
EL	1 648	26.0
ES	24 565	5.2
FI	768	2.5
FR	2 691	6.5
HR	6 116	1.5
HU	4 333	3.7
IE	119	0.8
IT	71 410	10.7
LT	260	12.3
LV	132	3.8
NL	776	8.4
PL	12 814	9.3
PT	40 020	2.1
RO	25 459	1.2
SE	123	8.1
SI	1 163	3.5
SK	6 838	3.3

Sources: SBS data 2021 and authors' calculations based on SBS data.

Artisanal activities in the sector

Craftspeople and artisans are mentioned in 10 of the 24 Member States (Austria, Croatia, Estonia, Hungary, Ireland, Italy, Lithuania, Slovakia, Spain and Sweden), often working in microcompanies or as individual entrepreneurs and solo self-employed workers. They represent the majority of workers in Sweden (mostly self-employed). In Italy, according to one of the main employer organisations, in 2022 there were more than 7 000 craftspeople, of whom almost 60 % were active in footwear production while 40 % worked in repair activities. In Estonia the second and third largest footwear-manufacturing companies are local artisan family businesses, and in Spain artisans are often employed in family-owned footwear companies. According to national correspondents, Bulgaria and Romania are the only Member States where craftspeople and artisans are explicitly not part of the footwear sector but belong to the service sector (most often recorded as sole traders) or to NACE 13.9 'manufacture of other textiles' and NACE 14 'manufacturing of wearing apparel'.

1.2. Companies in the footwear sector

The European footwear sector mainly consists of very small enterprises – zero to nine employees – (see Figure 3, for absolute numbers see Table 8), often located in specific regional clusters, as is the case in France, Italy, the Netherlands ([9]) and Portugal. In 2022, microfirms represented 74 % of companies in the footwear sector in the EU-27, ranging from 54 % in Bulgaria to 97 % in Sweden, and more than 85 % of all companies in the sector in 9 of the 24 Member States for which data were available (namely Denmark, Finland, France, Greece, Lithuania, the Netherlands, Slovakia, Slovenia and Sweden). Only Croatia, Germany, Hungary, Italy, Poland, Portugal, Romania and Spain report having more than one large company (with more than 250 employees), while companies with up to 49 employees account for more than 80 % of the total number of companies in all Member States (and more than 90 % in most of them). Looking at the structure of the footwear production sector, overall, cheap footwear imported from China and South-East Asia led a significant proportion of producers in several Member States (for example Bulgaria, Denmark, Estonia, Finland, Slovenia and Sweden) to outsource manufacturing and/or specialise in higher-added-value and niche markets. The Danish company ECCO moved its production sites first to Portugal, in the early 2000s, then to Hungary and finally to East Asia, leaving only the design and sales/administration departments in Denmark. In Finland much of the production of leisure shoes moved abroad, while companies producing protective footwear have been growing in importance. In Hungary, which had a long tradition of shoe production until the 1990s, with large production runs and significant exports to the Soviet Union, the business structure shifted towards subcontracting through global production networks. Subcontracting for raw materials, tanneries, components, accessories, etc. is also common in Italy, leading to high geographical concentration within specific districts (mainly located in a few regions).

The temporal trend in the number of companies between 2014 and 2022 is less clear cut than employment trends, with 16 of the 23 Member States for which data are available reporting a decrease in the number of companies, while 6 report an increase (

Table 7). Among the Member States that registered a reduction in the number of companies, in Sweden, which used to have a strong tradition in footwear manufacturing until the 1960s, production fell abruptly after import restrictions were lifted, and by the 2000s almost no Swedish shoe manufacturers remained. Interestingly, among the Member States that recorded an expansion in the number of companies in the footwear-manufacturing sector, this increase has been associated with a reduction in total employment (except for Denmark, where employment also increased by 34 %). This trend suggests an expansion of microfirms and that some large firms might have left the market, which is also consistent with increasing specialisation in footwear manufacturing. In Spain, despite a steadily

([9]) The footwear sector used to have some historical importance at the regional level, particularly in the region of North Brabant.

decline observed since 2008 in the number of companies, between 2013 and 2022 there was a rise in large companies.

Table 7: Change in number of companies in the sector between 2014 and 2022

Member State	Number of companies, 2014	Number of companies, 2022	Change (%)
AT	84 (*)	106	26.2
BE	44	31	– 29.5
BG	368	242	– 34.2
CZ	194	148	– 23.7
DE	513	358	– 30.2
DK	18	21	16.7
EE	22	22	0.0
EL	527	401	– 23.9
ES	3 203	2 813	– 12.2
FI	49	57	16.3
FR	384	361	– 5.9
HR	104	109	4.8
HU	246	218	– 11.4
IE	n.d.	n.d.	n.d.
IT	8 301	6 541	– 22.2
LT	49	45	– 8.2
LV	18	15	-16.7
NL	131	138	5.3
PL ([10])	1 935	1 224	– 36.7
PT	2 730	2 427	– 11.1
RO	1.230	1 003	– 18.5
SE	88	68	– 22.7

([10]) National data indicate the following numbers: 3 746 in 2015; 2 746 in 2022.

SI	81	67	– 17.3
SK	219	342	56.2

(*) Network of Eurofound Correspondents data from previous representativeness study (SBS data not available), reference year 2015.

Note: n.d., no data.

Source: SBS data for the number of companies in 2014 (except for Austria) and 2022.

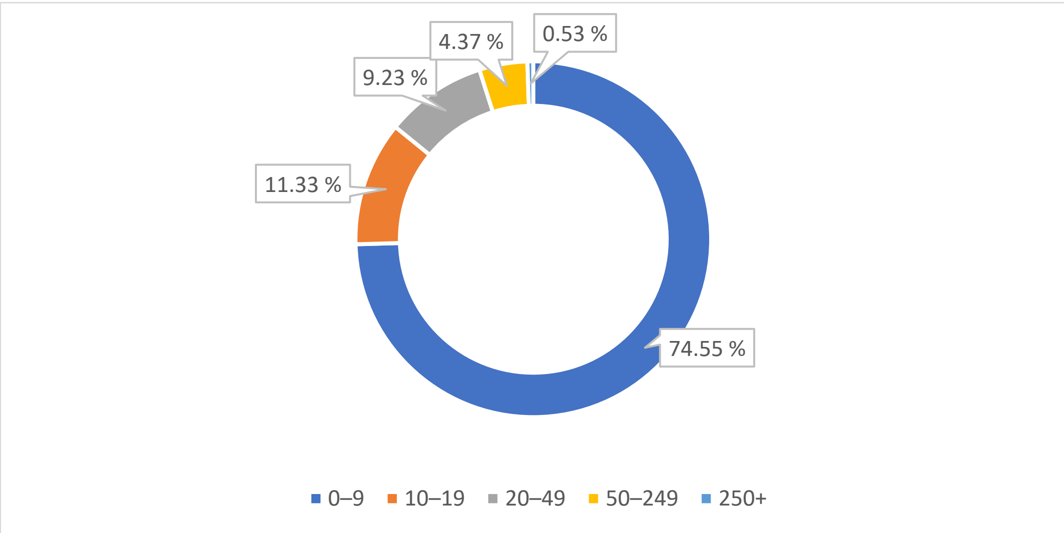
Table 8: Distribution of companies in the sector by size

Number of employees	0–9	10–19	20–49	50–249	250+
Number of companies	12 339	1 875	1 527	723	88

Source: SBS data for 2021–2022.

A more detailed overview of the numbers of companies by size can be found in the Annex (Table 47).

Figure 3: Distribution of companies in the sector by size, 2022



Source: SBS data for 2022.

Specificities of companies in the sector regarding industrial relations

According to the data collected by Eurofound national correspondents, certain specificities of the footwear sector often make it difficult for trade unions to organise workers across Member States. The small size of the footwear production sector represents a significant obstacle to trade union activity in Denmark, Estonia, Ireland, Lithuania, the Netherlands and Poland. The prevalence of small and medium-sized enterprises in the footwear sector also makes it difficult for trade unions in France, Hungary (where the lack of sectoral-level bargaining adds additional complexity) and Latvia to organise workers. High rates of self-employed workers (Finland) and a complex supply chain in the sector (Italy) represent additional difficulties for trade unions' activity. In Austria, the combination of relatively low wages, the small size of the sector, the small number of companies and the large number of solo self-employed workers in the artisan/crafts subsector makes it difficult for unions to organise workers in the sector.

According to Bulgarian trade unions, the footwear sector is characterised by low pay, precarious employment, poor working conditions, undeclared work and mainly less-educated workers belonging to low-income groups or minorities, resulting in a certain degree of hesitancy to join trade unions due to the fear of possible negative reactions by employers. However, the situation is expected to change, as a reform of the Penal Code implemented in 2023 introduced severe penalties for 'whoever by violence, threat or any other unlawful means prevents a person from exercising the right to trade union association'.

Interestingly, Portugal is the only Member State where the specificities of the footwear sector are considered to facilitate the organisation of workers by trade unions. As a matter of fact, the footwear sector, compared with the whole economy, is characterised by a significantly smaller proportion of microenterprises (96 % of all firms in Portugal employ fewer than 10 workers, while the same figure for the footwear sector is around 66 %) and a larger proportion of companies with 10–49 and 50–249 employees (24.9 % and 8.5 %, respectively, for the footwear sector, compared with 3 % and 0.5 % in the whole country). Despite the share of large companies being only 0.3 % in the Portuguese footwear sector, it is still three times larger than that recorded for the whole economy.

The particular structure of the footwear sector, characterised by a vast majority of micro- and small companies, also makes it difficult for employer associations to organise companies in Croatia, Czechia, Denmark, Germany, Hungary (even if there is compulsory membership of the Chamber of Commerce and Industry for all types of firms and for self-employed workers in the sector; such membership is largely formal), Italy (where challenges in the organisation of companies for employer organisations also arise from the presence of long and complex supply chains and the size and characteristics of companies), Latvia, Lithuania and Slovenia. The lack of representative employer organisations is also a problem in the Netherlands and Slovakia. Conversely, in Portugal the specificities of the sector favour organisation on the employers' side, as micro- and small firms in the footwear sector represent a significantly lower share of the Portuguese economy, as explained above. Despite the limited size of the Swedish footwear sector, in terms of both companies and total employment, the organisation of companies by employer organisations does not appear to be particularly difficult.

In 5 of the 24 Member States for which data are available (Denmark, Hungary, Slovakia, Spain and Sweden) some associations or professional organisations (not trade unions or employer organisations) represent companies in the sector. In Denmark, shoemakers' guilds are active in the footwear sector and mostly represent repair shops, but they do not conclude collective bargaining agreements. In Croatia, the Chamber of Economy is active in the footwear sector to prepare various analyses and surveys on the sector but does not participate in social dialogue and is not involved in industrial relations. In Sweden, an association for cobblers and master cobblers, with a long history, is active in the footwear sector, organising the masters' certificates for experienced cobblers, but plays no role in social dialogue. A similar role is played by a craft guild in Poland.

The footwear sector in Finland, Italy and Romania is also characterised by the presence of cooperatives of craftspeople and artisans. In Romania, these cooperatives are associations of individuals who jointly carry out production activities, the marketing of goods, and the execution of work and provision of services, which contribute, directly or indirectly, to the development of the craft activities of their cooperative members. The craft cooperative in the handicraft sector in Romania, UCECOM includes

500 cooperative entities. It represents and promotes the economic, social and cultural interests of cooperatives' members and associate members in their relations with the public administration, state authorities and other institutions, and supports and promotes cooperative principles. UCECOM is also part of the Advisory Committee for Entrepreneurship, whose role is to debate and draft recommendations on the definition and implementation of policies to develop and increase the competitiveness of the Romanian business environment.

1.3. Impact of twin transitions on the sector

As the national reports of the Eurofound correspondents reveal, in the last few years the European footwear sector has undergone significant transformations driven by sustainability concerns, technological advancements and changing consumer preferences. While some Member States have reported no evidence of recent developments in terms of new job profiles and activities in the footwear sector (Estonia, Latvia, Lithuania and the Netherlands), others have witnessed the emergence of new vocational roles and manufacturing methods.

The footwear industry in Italy is working on a transformation towards a circular and sustainable business model. The country has seen the appearance of new professional roles and activities linked to circularity, the energy transition and environmental management. These include specialised functions like product and process research and development focused on sustainability and efficiency, data analysis for guiding strategic business decisions, and materials science roles like chemical analysts and managers in charge of selecting and managing eco-friendly production materials. Spain has emerged as a hub for initiatives centred around circularity, Industry 4.0 integration and eco-friendly manufacturing processes. These projects rely on the automation of operations, advanced digitalisation and the use of recycled materials, driven by the overarching goal of reducing the environmental impact of footwear production. Similar trends have been observed in France, where the sector has witnessed the installation of automated and robotised production lines, complemented by the emergence of shoe repair and rental services. Germany has experienced changes in job profiles in order to accommodate new manufacturing processes, customer demands for sustainability and the integration of digital technologies. The country has witnessed the appearance of professions like three-dimensional (3D) computer-assisted shoe designers and digital marketing experts, underscoring the industry's effort to embrace digitalisation. Czechia has innovated its footwear production by employing materials like hemp, corn fibres and vegan leather and adopting advanced manufacturing techniques including 3D printing and 3D scanning.

In general, with the increasing adoption of advanced manufacturing techniques such as robots, automated production lines and 3D printing, and the creative use of recycled or eco-friendly components, this sectoral transformation has expanded to most EU Member States (although to differing extents). Apart from the aforementioned Member States, developments in this direction have also been observed in Croatia, Hungary and Portugal, where new technologies, innovative materials and sustainable ways of producing footwear are increasingly being employed.

Despite country-specific differences concerning the impact of the twin transitions on economic output, the workforce transformation in terms of new skills required and the varying relevance of shoe repair activities in the national footwear sector ([11]), there seems to be a common thread running through most European countries: the industry's concerted efforts to align with the global sustainability agenda. From waste management and circular economy initiatives in Member States like Bulgaria, Romania and Slovakia to the exploration of repair, recycle and remanufacturing activities in France, Greece and Spain, the sector is attempting to integrate and foster the current ecological transformation. Member States like Denmark, Estonia, Finland and Sweden, while reporting limited advancements, have recognised the growing importance of sustainability and circular economy practices, driven by increasing ecological awareness and regulatory compliance.

1.4. Sectoral overlap between footwear sector, leather and tanning sector and other light industry sectors

Overall, the footwear sector and the leather and tanning sector demonstrate a spectrum of integration across Europe. In general, the connections between the sectors are stronger where the value chains are tighter and their sizes are limited. Labour representation often brings the two industries together on the part of the workers, even if employers organise separately at times.

The footwear sector and the leather and tanning sector have varying degrees of linkage across Europe. In most Member States the two sectors are closely tied and often represented by the same trade unions and employer organisations, as in Austria, Belgium (where the two sectors have been merged due to their limited size), Croatia, Czechia, Denmark, Finland, Germany, Hungary, Italy, Latvia, Poland (where companies in the footwear sector often include leather production, or rely on smaller subcontractors from the leather sector) and Sweden. In Italy, where the two sectors are closely linked due to their shared reliance on leather as a primary material, while maintaining distinct characteristics in terms of production and market focus, workers and businesses are organised by the same trade unions and employer organisations (even though some organisations are specific to one sector). Moreover, in Slovenia and Sweden the production of footwear is covered by the same collective agreement as leather and tanning. In Estonia, the same trade union used to organise members in both sectors, but it currently has no members in the leather and tanning sector. In a number of Member States, the footwear sector and the leather and tanning sector share the same trade unions, while employer organisations are only active in one sector, as in Bulgaria, France, Greece, Portugal, Romania and Spain. In the Netherlands the same trade unions are active in both sectors and there is some overlap in manufacturing, but the employer organisation that used to organise employers in both sectors is no longer active in the footwear sector. Finally, in Lithuania there is no connection between the two sectors, and the only employer organisation (with just one member) exclusively organises workers in the footwear sector.

Concerning the classification of the manufacture of finished leather goods (belts, bags, wallets, etc.), these activities are considered part of the leather and tanning sector in most of the Member States for which data are available (Austria, Belgium, Croatia, Denmark, Estonia, Finland, France, Greece, Hungary, Ireland, Romania, Slovakia and Slovenia). In Bulgaria and Portugal, the manufacture of finished leather goods belongs to the footwear sector, while in Germany and Sweden there is some

([11]) Shoe repair activities are considered part of the footwear production sector in 12 of the 22 Member States for which data are available. In Estonia, Hungary, Portugal, Romania and Slovenia shoe repair activities belong to NACE 95.23 'repair of footwear and leather goods', while in Bulgaria, Denmark, Germany and Slovakia they are part of other service/commerce activities.

sectoral overlap. In Sweden, the production of leather shoe components is considered part of the footwear sector, while the manufacture of other finished leather goods falls under the leather and tanning sector. In Latvia, the manufacture of finished leather goods belongs to the broader aggregate of the manufacture of textiles, clothing and leather, while in Czechia, the Netherlands and Spain these activities are classified as a separate sector. In Poland, the production of bags and leather goods is usually treated separately from the footwear sector.

2. National level of representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the footwear sector. The method for conducting the representativeness studies combines a top-down approach (all sector-related affiliates of the European associations CEC and industriAll Europe) and a bottom-up approach (all other associations with a sector-related membership domain involved in collective bargaining) to identify national-level sector-related organisations in the footwear sector, defined by NACE code 15.20. The Network of Eurofound Correspondents identified 43 sector-related trade unions active in 20 Member States, and 40 sector-related employer organisations active in 18 Member States (Table 9). Of the 40 organisations identified on the employers' side, 26 are employer organisations, 13 are business associations and 1 is a branch association (in Bulgaria). The green cells in Table 9 indicate the number of trade unions (on the left) and employer organisations (on the right) active in the footwear sector in each of the 24 Member States for which data on the footwear sector are available ([12]). No trade unions have been identified in the footwear sector in Ireland ([13]), Latvia, Lithuania and Poland, while Estonia, Ireland, Latvia, the Netherlands, Romania and Slovakia do not have active employer organisations for the sector. The number of social partners active in the footwear sector varies widely among Member States (1–5 trade unions, 1–6 employer organisations), with the highest numbers of social partners reported in France (5 trade unions, 2 employer organisations), Italy (4 trade unions, 6 employer organisations ([14])) and Slovenia (4 trade unions, 3 employer organisations).

The numbers of trade union and employer organisations differ from those in the representativeness study for the sector published in 2017 (48 trade unions were reported in 24 Member States, and 28 employer organisations in 17 Member States). The differences arise from a number of factors, including the disappearance of some organisations and the creation of others, but also some small differences in methodological approach. Some of these differences are explained in notes under Table 9 and are briefly summarised here. On the trade union side, the number of Member States with trade unions in the sector has reduced because, following Brexit, the United Kingdom is no longer included and because Cyprus was not included in the study due to the very limited scale of the sector there. Finally, two unions mentioned in the previous study, LPIPS Solidarumas in Lithuania and FNSZZPL in Poland, indicate that they no longer have members in the sector. Both unions are therefore not included in this report. A number of other trade unions mentioned in 2017 are no longer included due to a lack of members in the sector (GPA-djp in Austria, FLI Podkrepa in Bulgaria, SITESE and CESP in Portugal and Ledarna in Sweden). In Belgium CNE-LBC and SeCta-BBTK are no longer mentioned,

([12]) An alphabetical list of all national organisations, with their abbreviations and full names, can be found in Table 45 in Annex 1.

([13]) Ireland is included in this study only in Chapter 1, where the economic background and employment specificities of the footwear sector are presented, due to the very small scale of the sector and the relative lack of information on workforce and collective bargaining.

([14]) The national database of collective agreements of the Italian National Council of Economy and Labour listed, in November 2024, 11 collective agreements explicitly covering the footwear sector, signed by 9 sector-related trade unions and 21 employer organisations. The four unions and six employer organisations included in the studies were assessed by the national correspondents as being representative for the sector, given the lack of national representativeness criteria, which translates into legal loopholes allowing any organisation to proclaim itself representative for negotiating and signing national collective agreements.

since unions have centralised their social dialogue responsibilities, and activities in the footwear sector have been transferred to ACV-BIE and ABVV-FTGB ACCG. In Spain ELA IE is currently not involved in collective agreements in the sector, and in Finland TEAM is now part of Teollisuusliitto. On the other hand, eight additional trade unions are mentioned in Denmark, Finland, Italy, Slovakia and Slovenia, largely because they are party to collective agreements in the sector. In Slovenia, three of the additional unions mentioned are company-level trade unions.

On the employer side, the change in the number of Member States with relevant organisations arises from organisations being identified in Bulgaria, Czechia and Latvia that were not included in the last report, whereas no relevant organisation is now present in the Netherlands or Romania. One of the organisations in Czechia, ČOKA, was identified at the national level during the process of the previous representativeness study but was not included, since it is a business association not involved in collective bargaining. The organisation joined CEC in 2018 and is hence now included. In Belgium, FEBIC was mentioned in the 2017 report as a member of CEC but has since ceased to exist. Another organisation, Ledercuir, was identified but is not a member of CEC. Many of the newly included organisations in Denmark, Finland, Hungary, Italy, Poland and Sweden have members in the sector, but are relatively small and are largely business associations.

Table 9: Number of sector-related organisations in each Member State

Number of trade unions	Member State	Number of employer organisations / business associations
2	**AT**	2
3	**BE**	1
1 (1)	**BG**	1
1	**CZ**	2
1	**DE**	1
2	**DK** (2)	3
1	**EE**	0
1	**EL**	2
2 (3)	**ES**	2
4	**FI**	1 (4)
5	**FR**	2 (5)
1	**HR**	1 (6)
1	**HU**	4
0	**IE**	0
4	**IT**	6
0 (7)	**LT**	1
0	**LV** (8)	0
2	**NL**	0
0	**PL** (9)	4
3 (10)	**PT**	1
1	**RO** (11)	0
2 (12)	**SE**	3
4	**SI**	3
2	**SK**	0
43	**EU-24**	40

(1) In Bulgaria, a second trade union – FLI CL Podkrepa – was included in the previous study but has not had members in the footwear sector since 2017 and is not involved in any collective bargaining for the sector. Therefore, it is not included in the study. FLI CL Podkrepa is an industriAll Europe affiliate.

(2) In Denmark, the largest business association, Skobranchen.dk, and the Danish Chamber of Commerce (DE) decided not to participate in this study. Skobranchen.dk counts approximately 450 member companies (sales companies, suppliers, designers, agents, manufacturers, etc.) and joined DE in 2021. Moreover, the business association / guild Foreningen af Ortopædiske Håndskomagermestre (relatively small in both size and relevance to the footwear sector) has not been included in this study due to lack of information.

(3) In Spain, the trade union ELA IE has not signed any collective agreement in the sector and is thus not included in the study.

(4) In Finland, one additional employer organisation – Finnish Textile and Fashion – and one business association – Suomen Yrittäjät – are present in the sector but not included in the study. Finnish Textile and Fashion has only two member companies (which could also be members of the Association of Finnish Leather

and Shoe Industries), which have fewer than five employees, it does not participate in collective bargaining and it is not representative in the footwear sector. Suomen Yrittäjät's members are self-employed or microcompanies with fewer than five employees (which could also be members of the Association of Finnish Leather and Shoe Industries), it does not participate in collective bargaining or sign collective agreements and it is thus not representative in the footwear sector.

([5]) In France, the employer organisation Chambre syndicale nationale des bottiers, which was included in the previous study, is currently a business association promoting bootmaking craftspeople and not included in this study, as it has given its mandate for social dialogue in the sector to FFC (a representative employer organisation included in the study). Moreover, Alliance France Cuir, a business association that covers 21 employer organisations / business associations active in the leather sector, is not included in the study, as its role in the sector is mainly related to an economic observatory and the financing of support schemes for the sector's activity.

([6]) In Croatia, the Association of Textile, Clothing and Leather-processing Industry (with 53 member companies) is not included in the study, as it does not participate in collective bargaining in the footwear sector.

([7]) In Lithuania, the trade union LPIPS Solidarumas, included in the previous study, does not have members in the sector according to the information provided by its chair, so it is not included in this study.

([8]) In Latvia, the trade union Latvian Industrial Workers Trade Union (LIA) and the employer organisation Association of Textiles and Clothing Industry (VRUA) do not have members in the footwear sector and thus are not included in the study's data.

([9]) In Poland, four additional trade unions (OPZZ FZZMiH, OPZZ Federation of Trade Unions of the Light Industry, Federation of Independent Self-Governing Trade Unions of the Light Industry and Solidarity), two additional employer organisations (Union of Polish Textile Manufacturers and Polish Craft Association) and one business association (Association of Employers of the Apparel and Textile Industry) are mentioned by the Network of Eurofound Correspondents but not included in the study. The two employer organisations refused to participate in the study, and the trade unions were not included because they indicate that they have no members in the sector.

([10]) In Portugal, two trade unions (Sitesc and STV), which used to have members in the sector until 2003 and 2006, respectively, have been terminated by court order and thus are not included in this study. Moreover, six additional trade unions (COFESINT, CESP, FESAHT, FETESE, SITESE and SITEMAQ) exist but are not included in this study, as there are no indicators that these organisations have a significant presence in the footwear sector. COFESINT is a federation that, until 2019, had a mandate from Sindeq (a representative trade union currently active in the footwear sector) to represent it in the footwear sector's collective bargaining. Sindeq then left COFESINT and signed a new collective agreement in 2023. FESAHT and CESP are signatories to the multi-employer collective agreements negotiated by FETESE (a representative trade union currently active in the footwear sector), but their domains mainly cover food/beverage/tobacco manufacturing and commerce/services, respectively. FETESE formally has a collective agreement in the footwear sector, but its last revision was signed in 2003 and no workers are currently covered by it, according to the Ministry of Labour (Office for Strategy and Planning, 2022). SITESE used to be the leading trade union in the FETESE federation (which does not play any significant role in collective bargaining for the sector), but it is no longer a member and does no collective bargaining of its own in the sector. SITEMAQ was a signatory to Sindeq's collective bargaining agreement in the footwear sector until 2023 (when the latter signed its new collective bargaining agreement).

([11]) In Romania, the employer organisation Sfera Factor (Association of Leather Manufacturers), which was included in the previous study, ceased to exist in 2023, because of lack of leadership in the association. It is thus not included in this study. FEPAIUS (Employers' Federation of Textiles and Clothing) was also included in the 2017 study but does not include any footwear companies nowadays. Moreover, the trade unions UNICONF (National Federation of Trade Unions in Light Industry), Solidarity Trade Union Federation and industriAll-BNS are excluded, as they have no members in the footwear sector.

([12]) In Sweden, the trade unions Ledarna, Handelsanställdas förbund and Sveriges ingenjörer are not included in this study, as they have no members in the footwear sector.

Source: Network of Eurofound Correspondents, 2023.

2.1. Trade unions

Out of the 24 Member States considered in this study, 20 record at least one sector-related trade union (no trade unions are present in Ireland, Latvia, Lithuania or Poland). The breadth of national trade union coverage in terms of subsectors of footwear manufacturing is presented in Table 10, along with information on the European affiliation of each trade union active in the sector and on membership domain. This study focuses on organisations whose domain relates to the footwear sector, classified according to the four patterns of sector-relatedness presented in the introduction to this report. More than half of sector-related trade unions cover part of the sector and also have members in other sectors (sectional overlap), while for 12 out of 43 trade unions the membership domain covers the whole footwear sector and goes beyond. For 5 trade unions (in France, Slovakia and Slovenia), the membership domain includes only a subset of the footwear sector, and no other sectors. Overall, most trade unions (37 out of 43) also organise workers in other sectors (mostly in manufacturing), and 33 out of 43 are affiliated to industriAll Europe (in 17 Member States). Overlap arises from different modes of demarcation:

- **cross-sectoral** domains, as in the cases of both trade unions in Austria; ACV-BIE and ABVV-FGTB ACCG in Belgium; FOSIL in Bulgaria; IG BCE in Germany; both trade unions in Denmark; both trade unions in Spain; Teollisuusliitto, PRO and Tradenomit in Finland; BDSZ in Hungary; Filctem CGIL, FEMCA CISL and Uiltec UIL in Italy; and Unionen in Sweden,
- domains covering the **broader TCLF sector** or light industry, as for OS TOK in Czechia; ETTAF in Estonia; OEKIDE in Greece; CGT-THCB in France; SIND TOKG in Croatia; FESETE in Portugal; Confpeltex in Romania; and STUPIS in Slovenia,
- domains including activities that are **not directly related to the footwear sector** (such as construction and transport industries, the energy, mining and chemical sectors, ICT, finance, commerce and hospitality services, agriculture and the agri-food industry, the pharma and health sectors, the metal industry), as in ACLVB-CGSLB in Belgium; YTN in Finland; FO Chimie, CFTC-CMTE and CFE-CGC AGRO/SNCEA in France; SIMA in Portugal; IF Metall in Sweden; and IOZ in Slovakia.

FNV and CNV in the Netherlands do not provide information on which parts of the footwear sector they cover, but they are defined as cross-sectoral organisations covering all sectors of the Dutch economy.

More than 90 % of trade unions active in the footwear sector organise workers in the subsector related to the manufacturing of classic and leisure shoes (in 19 out of 20 Member States with sector-related organisations), and around 74 % cover the production of athletic and sports shoes and safety shoes (in 16 and 14 Member States, respectively). The production of bespoke and artisanal shoes (which is not present in Bulgaria), of orthopaedic shoes and of shoe components are covered by 49 % to 60 % of trade unions (respectively 21, 24 and 26 trade unions out of 43). In the manufacturing of finished leather goods, 35 out of 43 trade unions organise workers, even though it is considered part of the footwear-manufacturing sector only in Belgium, Finland and Sweden.

Table 10: Sector coverage of sectoral trade unions

	Total	Classic and leisure shoes	Athletic and sports shoes (including outdoor shoes)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	industriAll Europe affiliation
Number of trade unions	43	39	32	24	32	21	26	35	38	33
Number of Member States	20	19	16	13	15	10	12	18	21	17
Member States with no trade unions	4	5	8	11	9	14	12	2	3	6

Note: No data available for the two trade unions of the Netherlands (FNV and CNV) about their presence in the different parts of the sector. The total number of trade unions includes only trade unions for which a fact sheet is included.

Source: Network of Eurofound Correspondents, 2023.

A more detailed version of this table can be found in the Annex (Table 48).

Looking at trade union coverage across different categories of workers, only employees are represented in all Member States, by 91 % of sector-related trade unions (Table 11). Conversely, only nine trade unions in five Member States represent self-employed workers (in Austria, Finland, Italy, the Netherlands and Sweden). Owners of their own businesses with employees are covered by six trade unions in Italy and the Netherlands, while managers and other staff in the sector are represented by 51 % and 70 % of sector-related trade unions, respectively. Additional information in terms of specific occupational categories covered by the sector-related trade unions is available for four Member States: PROGE in Austria and 3F in Denmark organise blue-collar workers; GPA in Austria, PRO in Finland and Unionen in Sweden organise white-collar workers; YTN in Finland specifically covers senior salaried employees with an academic background. In all these cases, workers are then organised across several or all sectors.

As for the educational level of workers covered by sector-related trade unions, most trade unions organise workers with primary- and secondary-level education (30 and 36 trade unions out of 43, in 15 and 18 Member States out of 20, respectively), while workers who have completed tertiary education are represented by only 53 % of sector-related trade unions in 11 Member States. The latter category of workers has no representation in the footwear sector in Bulgaria, Czechia, Denmark, Estonia, Portugal, Slovakia and Sweden (no data available for the Netherlands), which is consistent with the fact that workers with tertiary-level education only represent a residual category in most Member States (around 10 % of the whole workforce), as reported in Chapter 1 of the present study. As for company size, workers in small and medium-sized companies are represented by 60–70 % of sector-related trade unions in 12–16 Member States, while the coverage of workers in very large firms (with more than 250 employees) is slightly higher than 50 %. Filctem CGIL, FEMCA CISL and Uiltec UIL in Italy are the only trade unions that cover workers in all occupations, of all educational levels and in all sizes of company. In Sweden both trade unions (Unionen and IF Metall) theoretically organise all white-collar workers in all company sizes, but no workers with tertiary-level education and no large firms are present in the footwear sector.

Table 11: Categories of workers covered by sectoral trade unions

	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Skill level			Company size groups (number of employees)			
						Primary	Secondary	Tertiary	1–9	10–49	50–249	250+
Number of trade unions	39	9	6	22	30	30	36	23	26	27	30	23
Number of Member States	20	5	2	11	15	15	18	11	12	13	16	13
Member States with no trade unions	4	19	22	13	9	9	6	13	12	11	8	11

Source: Network of Eurofound Correspondents, 2023.

A more detailed presentation of this information can be found in the Annex (Table 49).

Table 12 provides information on the membership strength of national trade unions, reporting the number of members, density in the sector and information on membership trends over the last two to three years. In 5 of the 20 Member States with sector-related trade unions (Austria, Belgium, Finland, Italy and Spain) data on membership strength are available only for a subset of trade unions, while for most Member States we have complete information. Information provided by the Network of Eurofound Correspondents is not always comparable (details are reported in the footnotes of Table 12), for several reasons: multiple data sources are used in Denmark and Finland; in some cases data include the leather and tanning sector, while most trade unions report data on the footwear sector alone; some trade unions provide estimates, rather than exact numbers; data on total sector employees exclude self-employed workers only where this disaggregated information is available; membership data for the OEKIDE federation in Greece probably refer to all the seven trade unions that are active in the TCLF sector.

Table 12: Organisational density of sectoral trade unions

Member State	Total sector employees	Number of trade unions in the sector	Data available for	Trade union members in the sector	Density (%)	Membership trend (1)
AT	1 399	2	1 out of 2 (2)	137	9.8	Decreased
BE	n.d.	3	2 out of 3	149 (3)	n.d.	n.d.
BG	6 302	1	1 out of 1 (1)	50	0.8	Decreased
CZ	1 549	1	1 out of 1	37	2.4	Stable
DE	9 839	1	1 out of 1	2 000	20.3	Stable
DK	56 (4)	2	2 out of 2	103	n.a.	Stable
EE	331	1	1 out of 1	15	4.5	Stable
EL	1 383	1	1 out of 1	2 337 (3) (5)	n.a.	Stable
ES	23 510	2	0 out of 2	n.d.	n.a.	n.d.
FI	1 200 (6)	4	2 out of 4 (2)	150–1 000 (7)	n.a.	Decreased
FR	3 063	5	5 out of 5	285	9.3	n.d.
HR	5 186	1	1 out of 1	350	6.7	Decreased
HU	4 254	1	1 out of 1	122	2.9	Decreased
IT	72 336	4	0 out of 4	n.d.	n.a.	Stable
NL	1 350	2	2 out of 2	140	10.4	Decreased
PT	39 370	3	3 out of 3	5.980	15.2	Mixed trends
RO	24 455	1	1 out of 1	705 (3)	2.9	Decreased
SE	101 (8)	2	2 out of 2	68	67.3	Decreased
SI	1 080	4	4 out of 4	508	47.0	Decreased
SK (9)	6 606	2	2 out of 2	585	n.a.	Mixed trends

(1) Assessment of the membership trend applies to trade unions for which data were provided.

(2) Data available include the largest trade union.

(3) Data refer to both the footwear and the leather and tanning sectors.

(4) The shoemakers' guild states that there are around 220 shoemakers in Denmark. The figure reported in the table is provided by Statistics Denmark and is consistent with the numbers in Eurostat's SBS.

(5) The number of trade union members exceeds the total workforce in the sector. This number was reported by the Network of Eurofound Correspondents in the revised version of the questionnaire and probably refers to the number of members of the whole federation (comprising seven trade unions).

(6) Data are provided by the trade union representative. The data provided by Statistics Finland uses a different metric of measurement (person-years) which is why the trade union data is presented here. Otherwise where would be more trade union members than employees in the sector.

(7) The largest trade union (Teollisuusliitto) reports 1 200 members in both the footwear and the leather and tanning sectors, while the second largest (PRO) reports fewer than 200 members.

(8) This number includes self-employed workers.

(9) Data for employment refer to the textile, leather and tanning, and footwear sectors, while membership data probably refer to the footwear sector alone.

Notes: n.a., not applicable; n.d., no data. Data on total sector employees exclude self-employed workers (where this information is available). The total number of trade unions includes only those for which a fact sheet is included.

Source: Network of Eurofound Correspondents, 2023.

Sectoral density figures refer to the ratio between the total number of union members in the footwear sector of each Member State and total sector employees (excluding self-employed workers, when the information is available). Unionisation appears to be highest in Sweden (67 %), where the footwear sector is very small (total workforce of 100 units, including self-employed people), and in Slovenia (47 %), while it is below 5 % in Bulgaria, Czechia, Estonia, Hungary and Romania. In the other Member States for which data on membership are available, density is around 10–20 %. In terms of time patterns, in 8 of the 13 Member States in which data on density are available, unionisation shows a decrease, while only Czechia, Estonia and Germany recorded a stable percentage over the last two to three years.

In terms of collective bargaining involvement, 36 of the 43 trade unions active in the footwear sector are recognised as representative organisations at the national level, in 17 of the 24 Member States with available data (Table 13). In Estonia no legal requirements are defined for the representativeness of social partners, nor is there a mutual recognition mechanism. In Slovenia three of the four sector-related trade unions are company-level organisations, which do not satisfy legal requirements for representativeness. Currently, no trade unions are involved in collective bargaining in four Member States (Bulgaria, Estonia, Greece and the Netherlands), and no sector-level collective bargaining is present in Slovakia (where both trade unions, IOZ and OZ KOVO, are involved in firm-level collective bargaining). In Greece, at the institutional level, the sector-related trade unions and employer organisations are involved in collective bargaining and considered representative, but the last multi-employer collective agreement in the footwear sector was signed in 2009 between OEKIDE, ELSEVIE, and OBYE, and no collective bargaining or collective agreements since then are available for the sector. Almost all sector-related trade unions are affiliated to a cross-sectoral national organisation, except SIMA in Portugal and IOZ in Slovakia.

Table 13: Collective bargaining involvement of sectoral trade unions

	Trade union recognised as representative (national level)	Multi-employer bargaining	Single-employer bargaining	Involved in social dialogue	Consulted by government	Involved in industrial action	National affiliation	industriAll Europe affiliation
Number of trade unions	36	29	24	22	17	18	41	33
Number of Member States	17	12	12	11	10	10	17	17
Member States with no trade unions	7	12	12	13	14	14	7	7

Note: In Bulgaria and the Netherlands no collective bargaining currently takes place in the sector, but FOSIL, FNV and CNV are in principle representative for the footwear sector and are cross-industry national trade unions. Data on representativeness and involvement in collective bargaining, social dialogue and industrial action are not reported for the Greek trade unions' federation OEKIDE, as the footwear sector has had no collective bargaining or collective agreements since 2009. In Romania, the trade union Confpeltex is consulted by the government through the National Trade Union Confederation (ALFA).

Source: Network of Eurofound Correspondents, 2023.

A more detailed presentation of this information can be found in the Annex (Tables 50 and 51).

Of the 43 sector-related trade unions, 15 are involved in both multi-employer collective bargaining (MEB) and single-employer collective bargaining (SEB) (in Belgium, Denmark, France, Italy, Slovenia, Spain and Sweden), defined respectively as bargaining conducted by trade unions (on behalf of the workers) and employer organisations (on behalf of the companies) and bargaining in which the company is the party to the agreement (including the cases where two or more companies jointly negotiate collective agreements). MEB is relatively more diffused in the sector: 29 of the 38 trade unions participate in MEB, compared with 24 in SEB. Among the 29 trade unions involved in MEB, only 8 are not involved in social dialogue and 12 are not involved in consultations with the government, while most trade unions that do not participate in MEB also do not participate in social dialogue or in government consultations.

The detailed version of Table 13 (see Table 50 in the Annex) provides additional information on the collective bargaining involvement of sectoral trade unions, reporting the figures for sectoral workforces covered by collective bargaining in which each trade union is involved. Coverage is 70 % and above in 20 of the 33 trade unions with available data, in 10 Member States (Belgium, Czechia, Finland, France, Germany, Italy, Portugal, Slovenia, Spain and Sweden), but, as previously discussed about membership data, for workforce coverage the information provided by the Network of Eurofound Correspondents is not always comparable (data for Belgium and for Teollisuuslijtto in Finland refer to both the footwear sector and the leather and tanning sector). A small group of trade unions record medium coverage rates around 30 % to 55 % (in Austria, Slovakia and Slovenia), while coverage rates are very low for eight organisations, 20 % or below (in Croatia, Hungary, FILP CISAL in Italy, Sindeq and SIMA in Portugal, Romania, OZ KOVO in Slovakia and TU Planika Turnišče in Slovenia). Looking at the density of collective bargaining coverage across subsectors of footwear manufacturing that are covered in all Member States covered by this study (excluding workers in the manufacturing of classic and leisure shoes), 20 of the 43 trade unions are involved in collective bargaining that does not cover specific parts of the sector (in 12 Member States).

In Member States with a pluralist/fragmented associational system in the footwear sector (such as Austria, Belgium, Finland, France, Italy, the Netherlands, Portugal, Slovakia, Slovenia, Spain and Sweden), the reasons behind the existence of several trade unions are mainly attributable to ideological differences and to the fact that they organise different categories of workers (Table 14). In Portugal, the four sector-related trade unions also organise workers in different parts of the country and in different subsectors of footwear manufacturing, while in Sweden IF Metall organises blue-collar workers and Unionen covers white-collar workers. In Slovenia TU Independence Alpina Žiri, TU Alpina Žiri and TU Planika Turnišče are company-specific trade unions, while STUPIS covers the whole country and workers in all sizes of company.

Table 14: Reasons for fragmentation at the national level

Member State	Represent a specific profession	Different categories of workers in the sector	Different parts of the country	Different types of companies (microfirms, small and medium-sized enterprises, larger companies)	Cover different parts of the sector	Ideological	Other reasons
AT		X					
BE						X	
BG	Only one trade union						
CZ	Only one trade union						
DE	Only one trade union						
DK							The one relevant trade union in the sector is a member of a trade union cartel, which signs the main collective agreement. Thus, both organisations are included.
EE	Only one trade union						
EL	Only one trade union						
ES							Historical reasons
FI		X					
FR		X				X	
HR	Only one trade union						
HU	Only one trade union						
IT						X	
NL						X	

PT		X	X		X	X	
RO	Only one trade union						
SE	X	X					
SI				X			
SK	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.

Source: Network of Eurofound Correspondents, 2023.

2.2. Employer organisations

In 18 of the 24 Member States the footwear sector counts at least one sector-related employer organisation, and the average is more than two (no employer organisations are present in Estonia, Ireland, Latvia, the Netherlands, Romania and Slovakia). The representation of employer organisations in the different parts of the footwear sector is shown in Table 15, along with information on the European affiliation of each sector-related employer organisation. Compared with trade unions, the level of European representation of sector-related employer organisations is much lower, with only 10 of the 40 employer organisations affiliated to CEC and 5 affiliated to other European associations (COTANCE, Euratex, FESI, ACTE and SME United). In terms of membership domain, employer organisations show a more heterogeneous pattern than trade unions: sectoral overlap characterises 35 % (14 employer organisations), 27.5 % (11 employer organisations) cover the whole footwear sector and also other sectors and for 25 % (10 employer organisations) the membership domain includes only a subset of the footwear sector and no other sectors. Finally, the membership domain of 10 % (4 employer organisations) is perfectly congruent with the footwear sector (in Belgium, Greece, Portugal and Slovenia). The manufacturing of classic and leisure shoes is covered by 34 of the 40 employer organisations in all the 18 Member States with sector-related organisations, while all other subsectors are covered by 53–70 % of sector-related employer organisations. As in the case of trade unions, the manufacturing of orthopaedic shoes (27 of 40 employer organisations) and of bespoke and artisanal shoes (25 of 40 employer organisations) are the least-represented subsectors on the employers' side. Relatively low coverage can also be found in the manufacturing of finished leather goods (fewer than 53 % of employer organisations), in contrast to the unions' side (more than 77 % of trade unions represent workers in this specific part of the footwear sector).

Most employer organisations also organise workers in other sectors, with 13 employer organisations active in other NACE codes of the broad TCLF sector (in Austria, Bulgaria, Croatia, Czechia, Finland, Hungary, Italy, Poland and Sweden), 7 cross-sectoral organisations (such as Casartigiani, CLAAI and Confartigianato in Italy, which support handicrafts in all sectors; LATIA in Lithuania; PGPO in Poland; and ZDS and GZS-ZTOUPI in Slovenia) and only 3 employer organisations that cover workers in economic activities that are not directly related to the footwear sector (BIG in Austria, ČOKA in Czechia and IKEM in Sweden).

A more detailed version of this information by Member State can be found in the Annex (Table 52).

Table 15: Sector coverage of sectoral employer organisations

	Total	Classic and leisure shoes	Athletic and sports shoes (including outdoor shoes)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	CEC affiliation
Number of employer organisations	40	34	28	27	30	25	28	22	24	10
Number of Member States	18	18	15	14	17	13	16	12	14	10
Member States with no employer organisations	6	6	9	10	7	11	8	12	10	14

Source: Network of Eurofound Correspondents, 2023.

Looking at employer organisation coverage across different categories of companies (Table 16), micro- and small companies appear to be the most represented, with 29 of the 40 sector-related organisations reporting having affiliated members among these types of companies. These numbers are consistent with the figures provided by trade unions, where 60–70 % of trade unions organise workers in small and medium-sized companies. Small companies are represented by employer organisations in all Member States, except for Bulgaria, Croatia and Lithuania, where only medium-sized and large companies are affiliated to sector-related employer organisations. Large companies (with 250 or more employees) are only represented by 16 employer organisations, in the 11 Member States where these companies exist, and the footwear sector is relatively large (the workforces range between 1 000 and over 72 000).

A more detailed version of this information by Member State and company size can be found in the Annex (Table 53).

Table 16: Categories of companies covered by sectoral employer organisations

	Self-employed shoemakers	Micro-companies (1–9 employees)	Small companies (10–49 employees)	Medium-sized companies (50–249 employees)	Large companies (250+ employees)
Number of employer organisations	18	29	29	27	16
Number of Member States	10	13	15	16	11

Source: Network of Eurofound Correspondents, 2023.

Table 17 presents the membership strength of employer organisations in the footwear sector, in terms of both numbers of affiliated companies and numbers of employees working in affiliated firms. Data on membership strength for Belgium are not available; in Denmark and Italy data on membership strength are available only for a subset of employer organisations, while for most Member States we have complete information. Information provided by the Network of Eurofound Correspondents is not always comparable, as in some cases membership data are inconsistent with the total number of companies and employees (as in France, Poland, Slovenia and Sweden); multiple data sources are used in several Member States (Finland, Germany, Italy and Poland); solo self-employed workers are added either to the number of companies or to total employment, depending on how self-employed workers are considered in the Member State. Both membership strength and coverage of workers vary widely between Member States, ranging from slightly more than 4 % membership density in Bulgaria (almost 8 % of employees covered) to 88 % in Austria (and also more than 88 % of employees covered). Except for Austria, employers' representation in terms of affiliated companies is below 25 % in all Member States for which data are available, while coverage of workers is above 50 % in 6 of the 11 Member States with available data (Austria, Czechia, Finland, Greece, Portugal and Spain), suggesting that member companies in the sector tend to be relatively large. In terms of patterns over time, employer representation appears to be increasing only for 4 of the 34 employer organisations with available data (in Bulgaria, Czechia, Hungary and Poland), while the vast majority of employer organisations report stable or decreasing membership figures over the last two to three years.

Table 17: Organisational density of sectoral employer organisations

Member State	Number of companies in sector	Number of EOs covered by membership data	Number of EO members in the sector	Membership density (%)	Employment in sector	Number of EOs covered by employee data	Employees covered by EOs	Employment density (%)
AT	105	2 out of 2	92	87.6	1 399	1 out of 2	1 231	88
BE	110	0 out of 1	n.d.	n.d.	n.d.	0 out of 1	n.d.	n.d.
BG	241	1 out of 1	10	4.1	6 429	1 out of 1	n.d.	7.7 (1)
CZ	245	2 out of 2	23	9.4	1 549	2 out of 2	1 000	64.6
DE (2)	368	1 out of 1	91	24.7	9 839	1 out of 1	16 000	n.a.
DK (3)	23	2 out of 3	36 (4)	n.a.	79	2 out of 3	56 (4)	70.9
EL	432	2 out of 2	83	19.2	1 383	2 out of 2	1 280	92.5
ES	3 042	2 out of 2	580	19.1	23 510	1 out of 2	16 457	70 (1)
FI	75	1 out of 1	8	10.7	1 200 (5)	1 out of 1	700	58
FR (6)	165	2 out of 2	185	n.a.	3 063	2 out of 2	4 876	n.a.
HR	111	1 out of 1	6	5.4	5 186	1 out of 1	1 500	28.9
HU	251	4 out of 4	50	19.9	4 254	4 out of 4	1 915	45
IT	6 381 (7)	2 out of 6	1 395 (8)	21.9	72 336	1 out of 6	8 000 (8)	11
LT	14	1 out of 1	1	7.1	224	1 out of 1	48	21.4
PL	1 200 (9)	4 out of 4	195	16.2	11 997 (9)	3 out of 4	n.d. (10)	n.a.
PT	2 427	1 out of 1	338	13.9	39 370	1 out of 1	22 000	55.9
SE (6)	73	3 out of 3	77	n.a.	101	3 out of 3	166	n.a.
SI (6)	96	3 out of 3	102	n.a.	1 080	2 out of 3	1 665	n.a.

(1) Density provided by the national correspondents, not calculated by the authors. Solo self-employed workers are added either to the number of companies or to total employment, depending on how they are considered in the Member State. For Member States that reported self-employed workers among both companies and employment, we added the number to companies (to make the figures more comparable with

Table 12). The total number of EOs (as referred to in columns 3 and 7) includes only those for which a fact sheet is included.

([2]) Multiple data sources regarding the number of companies and employment are available, and the number of employees covered by EOs is inconsistent with each figure for the total workforce.

([3]) The number of companies in the sector only includes NACE 15.20 (excluding orthopaedic-shoe-making companies). Data on membership and employees covered by EOs are probably overestimated due to coverage of other companies, not only shoe manufacturers.

([4]) Data for Skobranchen (not reported in the table) suggest that most members are self-employed without employees, or microfirms.

([5]) Data are provided by the trade union representative. Statistics Finland reports a figure of 721 in person-years.

([6]) Membership data reported by both employer organisations are inconsistent with the total numbers of companies and employees.

([7]) Data are from Eurostat's SBS, as Network of Eurofound Correspondents figures do not seem entirely reliable (they exclude firms with no employees, which account for a significant fraction of the Italian footwear sector).

([8]) Membership data for Confartigianato Moda are only available for all the sectors covered by this employer organisation, which counts around 200 000 affiliated companies and 650 000 workers.

([9]) Data are from Eurostat's SBS, as Network of Eurofound Correspondents figures are not available. National data indicate 12 746 companies.

([10]) No clear membership data are available. PIPS reports 4 800 members, OIBS reports 18 % of the total workforce and Employers of Poland reports 15 418 employees in member companies, but the organisation's coverage is broader than the footwear sector.

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

Source: Authors' calculations based on data provided by the Network of Eurofound Correspondents, 2023.

In terms of the collective bargaining involvement of sector-related employer organisations, 28 of the 40 organisations active in the footwear sector are representative at the national level, in 16 Member States (Table 18), but only 21 are involved in collective bargaining. Of the 40 sector-related employer organisations, only 3 are involved in SEB (HDS/L in Germany, CNA Federmoda in Italy and AEC in Spain), and all three are also involved in MEB. MEB involves 21 employer organisations in all Member States, except the following: Bulgaria and Greece, where no collective bargaining currently takes place in the footwear sector; Denmark and Lithuania, where employer organisations are not involved in collective bargaining; and Croatia, Hungary and Poland, where no sectoral collective bargaining takes place. In Greece, at the institutional level, the sector-related employer organisations are involved in collective bargaining and considered representative, but the last multi-employer collective agreement in the footwear sector was signed in 2009 between OEKIDE, ELSEVIE, and OBYE, and since then there has been no collective bargaining or collective agreements for the sector. Around 63–65 % of sector-related employer organisations are affiliated to cross-industry national organisations and are consulted by the government on sector-related matters, while only 17 of the 40 sector-related employer organisations are involved in social dialogue.

Looking at the density of collective bargaining coverage of employer organisations across subsectors of the footwear-manufacturing sector (detailed version of Table 18), workers in the manufacturing of classic and leisure shoes and of shoe components are covered by all organisations that are involved in collective bargaining for the footwear sector, while 9 of the 23 employer organisations with available data are involved in collective bargaining that does not cover specific parts of the sector (in Austria, Czechia, France, Greece, Spain and Sweden).

A detailed version of this information by Member State can be found in the Annex (Tables 54 and 55).

Table 18: Collective bargaining involvement of sectoral employer organisations

	EO recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	National affiliation	CEC affiliation
Number of EOs	28	21	3	17	25	26	10
Number of Member States	16	11	3	9	12	18	10
Member States with no EOs	8	13	21	15	12	6	14

Notes: EO, employer organisation. No data are available for Belgium regarding CEC affiliation. HDS/L in Germany is affiliated to FESI. The employer organisation in Lithuania has only one member, so the definition of representativeness is not straightforward. Data on representativeness and involvement in collective bargaining, social dialogue and industrial action are not reported for the Greek trade union federation OEKIDE, as there has been no collective bargaining or collective agreements in the footwear sector since 2009.

Source: Network of Eurofound Correspondents, 2023.

In Member States with a pluralist/fragmented associational system on the employers' side of the footwear sector (such as Austria, Czechia, Denmark, Finland, France, Greece, Hungary, Italy, Poland, Slovenia, Spain and Sweden), the existence of several employer organisations is mainly because they organise different types of companies, cover different parts of the sector and represent different interests of the members (Table 19). In Italy and Poland some ideological differences exist among employer organisations.

Table 19: Reasons for fragmentation on the employers' side at the national level

Member State	Members in different parts of the country	Members in different types/sizes of companies	Cover different parts of the sector / different types of activities	Ideological	Some national employer organisations represent only the business/trade interests of the members; others represent the same members for social dialogue and collective bargaining	Other reasons
AT		X	X			
BE	Only one employer organisation					
BG	Only one employer organisation					
CZ					X	
DE	Only one employer organisation					

DK					X (*)	
EL		X				
ES			X			
FI	Only one employer organisation					
FR			X			
HR	Only one employer organisation					
HU			X			
IT		X		X		
LT	Only one employer organisation					
PL		X	X	X		
PT	Only one employer organisation					
SE			X			
SI		X			X	[15]

(*) Only one employer organisation in the sector. The others are business associations, covering different interests.

Source: Network of Eurofound Correspondents, 2023.

2.3. Collective bargaining patterns and social dialogue practices

This section describes collective bargaining patterns across Member States, and social dialogue practices. Table 20 and Table 21 report the distribution of collective bargaining categories across social partners and Member States, while Table 22 and Table 23 provide information on collective bargaining coverage and the existence of extension mechanisms. Currently, collective bargaining does not take place in the footwear sector in seven Member States (Bulgaria, Greece, Estonia, Latvia, Lithuania, the Netherlands and Poland). In Poland no collective bargaining at the sectoral level is available in any sector; collective bargaining only exists at the company or multi-company level.

Overall, SEB shows limited diffusion in the footwear sector of the 23 Member States with available data, with only 7 of the 42 trade unions involved (in Croatia, Hungary, Romania and Slovakia), and no employer organisation. Almost 35 % of sector-related trade unions in eight Member States are involved in both SEB and MEB, while on the employers' side only HDS/L in Germany, CNA Federmoda in Italy and AEC in Spain are involved in these collective bargaining patterns. MEB is significantly more diffused on both the unions' and the employers' side, with 12 of the 42 trade unions and 19 of the 40 employer organisations involved, reflecting the relatively high incidence of micro- and small companies in the footwear sector of Member States. In Czechia multi-sectoral bargaining is present in

([15]) There are two employer organisations (ZDS and GZS) in the sector, and companies are members of both. ZDS is mostly focused on social dialogue and collective bargaining, while GZS is also an economic chamber, focused on the development of the sector besides collective bargaining.

the footwear sector, and the only sector-related trade union is involved in MEB only through multi-sectoral bargaining, extended to the footwear sector.

Table 20: Collective bargaining

	Number of trade unions	Number of employer organisations
No collective bargaining involvement	7	17
Single-employer collective bargaining only	7	0
Multi-employer collective bargaining	12	19
Both single and multi-employer collective bargaining	15	3
Multi-sectoral collective bargaining	1	1
Total	42	40

Note: Employer organisations in Belgium are also involved in SEB, but not directly. In Czechia, the trade union is involved in MEB only through multi-sectoral bargaining, extended to the footwear sector. No collective bargaining in Greece in the sector since 2009.

Source: Network of Eurofound Correspondents, 2023.

Table 21: Form/level of bargaining in each Member State

Form/level of bargaining	Member States
MEB	AT, FI, PT
MEB and SEB	BE, DE, DK, ES, FR, IT, SE, SI
SEB	HR, HU, RO, SK
Multi-sectoral bargaining	CZ, DK, ES
No collective bargaining	BG, EE, EL, LT, LV, NL, PL

Source: Network of Eurofound Correspondents, 2023.

In terms of collective bargaining coverage (Table 22), the largest rates are found among Member States with MEB (including those with both MEB and SEB); nine Member States show collective bargaining coverage above 80 %, and Denmark and Germany between 51 % and 80 %. Member States characterised by the presence of SEB alone (Croatia, Hungary, Romania and Slovakia) show relatively low coverage. Collective bargaining coverage is below 25 % in Croatia and Hungary, and below 1 % in Romania.

Extension mechanisms are present in 15 Member States (Table 23), 11 of which also have some representativeness criteria to meet in order for the extension mechanism to apply. Italy has no formal extension mechanisms, but collectively agreed minimum wages are used by labour courts as a reference to assess the appropriateness of actual wages in individual disputes (following Article 36 of the Italian Constitution concerning the right to a fair wage), so they are also widely followed by non-affiliated firms, thus resulting in a de facto extension to all workers. In all Member States with only SEB (Croatia, Hungary, Romania and Slovakia), extension mechanisms make collective bargaining generally binding and the same mechanisms also apply to all workers in the footwear sector (except in Croatia). In Croatia, France, Hungary, Italy, Romania and Slovenia, trade unions need to meet specific criteria to enter single-employer collective bargaining, mainly related to their representativeness (France, Romania and Slovenia).

Table 22: Collective bargaining coverage and collective bargaining level

	Collective bargaining coverage				
	> 80 %	51–80 %	26–50 %	1–25 %	None
SEB		SK		HR, HU	RO (*)
MEB	AT, FI, IT, PT, SI				
MEB and SEB	BE, ES, FR, SE	DE, DK			
Multi-sectoral bargaining	CZ, ES	DK			
No collective bargaining					BG, EE, EL, LT, LV, NL, PL

(*) < 1 %.

Source: *Network of Eurofound Correspondents, 2023.*

Table 23: Collective bargaining coverage and extension mechanisms

Member States	% of sectoral workforce covered by collective bargaining (SEB and MEB)	% covered by MEB	Proportion of the workforce in the largest company as percentage of the sectoral workforce (with SEB)	Existence of a mechanism making collective bargaining agreements in the Member State generally binding	Existence of an extension mechanism in the footwear sector covering all workers with collective bargaining	Existence of criteria for inclusion in the extension mechanism	Existence of requirements/ criteria for taking part in SEB	Bipartite or tripartite social dialogue body in the sector	
								Bi	Tri
AT	100	100	No SEB	Yes	Yes	n.a.	n.a.	No	No
BE	96 (1)	96	n.a.	No	No	No	No	Yes	No
BG	No collective bargaining	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Yes	Yes
CZ	83 (2)	83 (2)	No SEB	Yes	No	Yes	No	No	No
DE	70	70	n.d.	Yes	No	Yes	No	No	No
DK	50–70	n.d.	n.a.	No	No	No	No	No	No
EE	No collective bargaining	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	No	No
EL	No collective bargaining	n.a.	n.a.	Yes	Yes	Yes	No	No	Yes
ES	100	100	n.d.	Yes	Yes	No	No	Yes	No
FI	100	100	No SEB	Yes	Yes	Yes	No	No	No

Member States	% of sectoral workforce covered by collective bargaining (SEB and MEB)	% covered by MEB	Proportion of the workforce in the largest company as percentage of the sectoral workforce (with SEB)	Existence of a mechanism making collective bargaining agreements in the Member State generally binding	Existence of an extension mechanism in the footwear sector covering all workers with collective bargaining	Existence of criteria for inclusion in the extension mechanism	Existence of requirements/ criteria for taking part in SEB	Bipartite or tripartite social dialogue body in the sector	
								Bi	Tri
FR	100	100	n.d.	Yes	Yes	Yes	Yes	Yes	No
HR	25	No MEB	25	Yes	No	Yes	Yes	No	Yes
HU	11	No MEB	11	Yes	Yes	Yes	Yes	Yes	No
IT	Almost 100	n.d.	n.d.	No	No	No	Yes	No	No
LT	No collective bargaining	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	No	No
LV	No collective bargaining	n.a.	n.a.	Yes	No	Yes	No	No	No
NL	No collective bargaining	n.a.	n.a.	Yes	No	Yes	No	No	No
PL	No collective bargaining	n.a.	n.a.	No	No	No	No	No	Yes
PT	100	100	No SEB	Yes	Yes	No	No	No	Yes
RO	< 1	0	< 1	Yes	Yes	Yes	Yes	No	No
SE	80–90	80–90	n.a.	No	No	No	No	No	No
SI	100	100	n.d.	Yes	Yes	Yes	Yes	Yes	No
SK	60	No MEB	60	Yes	Yes	No	No	No	Yes

([1]) 100 % of blue-collar workers.

([2]) Multi-sectoral collective agreement extended to the footwear sector.

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

Source: Network of Eurofound Correspondents, 2023.

Bipartite and tripartite social dialogue bodies involved in sector-related matters exist in 11 Member States (Table 24), and are almost evenly split between bodies with a statute and those an agreement as a legal basis. Bipartite organisations are present in Croatia, Greece, Poland, Portugal and Slovakia, while tripartite bodies can be found in Belgium, France, Hungary, Slovenia and Spain. In Bulgaria the main trade unions and employer organisations are members of both bi- and tripartite organisations, both active in the area of occupational safety and working conditions. In all Member States with available information, the largest sector-related social partners participate in bi- and tripartite bodies, except CFTC-CMTE in France and the Polish social partners. In terms of their role and domain of activity in the footwear sector, bipartite and tripartite bodies are mostly involved in advising and consulting administrative bodies on a broad range of matters, including health and occupational safety, improvement of working conditions, vocational training and employment. In some cases, bipartite bodies are also involved in collective bargaining consultations (Joint Standing Committee in France, Light Industry Sector in Hungary, Negotiating Group for Sectoral Collective Bargaining in Slovenia, Economic and Social Council in Slovakia and Joint Commission in Spain) and negotiations (Light Industry Sector in Hungary, Negotiating Group for Sectoral Collective Bargaining in Slovenia).

Table 24: Tripartite and bipartite social dialogue bodies

Member State	Name of the body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Participating trade unions	Participating employer organisations
BE	JC128	Bipartite	Agreement	Agreement	ACV-BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Ledercuir
	Subsistence Security Fund for the Hide and Leather Industry and Substitute Products	Bipartite	Agreement	Agreement	ACV-BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Ledercuir
BG	Sectoral dialogue	Bipartite	Health and safety, working conditions	Statutory – Labour Code	FOSIL, FLI CL Podkrepa	BATOK
	Industry Council for Tri-partite Cooperation Light Industry Council at Ministry of Economy and Industry	Tripartite	Health and safety, working conditions	Statutory – Labour Code	FOSIL, FLI CL Podkrepa	BATOK
EL	Sectoral Skills Council in Textile, Clothing, Footwear and Leather Industries	Tripartite	Systematic monitoring on professional skills needs in the textile, clothing, footwear and leather sectors	Agreement	Greek General Confederation of Workers via its labour institute (INE GSEE)	Hellenic Federation of Enterprises (SEV), Hellenic Confederation of Professionals, Craftsmen & Merchants (GSEVEE) via its small enterprises institute (IME GSEVEE), Hellenic Clothing Industry Association (SKEE),

						Association of Knitting – Readymade Garment Companies of Greece (SEPEE), Hellenic Association of Footwear Manufacturers and Exporters (ELSEVIE)
ES	Joint commission responsible for interpreting, monitoring and mediating the national sectoral collective agreement	Bipartite	Responsible for interpreting, monitoring, and mediating the current national sectoral collective agreement	Agreement	CCOO-Industria, UGT-FICA	FICE, AEC
FR	National Joint Committee for Employment and Vocational Training	Bipartite	Employment and vocational training	Agreement	CGT-THCB, FS-CFDT, FO Chimie, CFE-CGC AGRO/SNCEA	FFC, FFPO
	Joint Standing Committee for Negotiation and Interpretation	Bipartite	Collective bargaining and interpret-ation of the branch-level agreement	Agreement	CGT-THCB, FS-CFDT, FO Chimie, CFE-CGC AGRO/SNCEA	FFC, FFPO
HR	Sectoral council for textile, footwear, leather and rubber sectors	Tripartite	Wages, working conditions, health and safety	Agreement	SIND TOGK	HUP UTKI
HU	Light Industry Sector	Bipartite	Information, consultation and negotiation	Statutory	BDSZ	MKSZ

PL	Social Dialogue Council	Tripartite	National dialogue	Statutory	NSZZ Solidarność, Ogólnopolskie Porozumienie Związków Zawodowych, Forum Związków Zawodowych	Pracodawcy Rzeczypospolitej Polskiej, Konfederacja Lewiatan, Związek Rzemiosła Polskiego, Związek Pracodawców Business Centre Club, Związek Przedsiębiorców i Pracodawców, Federacja Przedsiebiorców Polskich
PT	Professional Training Centre for the Footwear Industry (CFPIC)	Tripartite	Vocational education and training	Agreement and statutory	Union of Footwear, Luggage and Similar Industry Workers, now called SNPIC – National Union of Professionals in the Footwear, Luggage and Related Industries, a member of FESETE. According to FESETE, SNPIC participates in the management of CFPIC	APICCAPS
	Campaign for the Continuous Improvement of Working Conditions in the Footwear Industry	Tripartite	Improve-ment of working conditions	Protocol signed by the Authority for Labour Conditions (ACT) and the trade	FESETE	A

				unions and employer organisation involved		
SI	Negotiating Group for Sectoral Collective Bargaining	Bipartite	Pay, working time, training	Agreement	ZSSS-STUPIS	GZS-ZTOUPI and ZDS
SK	Economic and Social Council of the Slovak Republic	Tripartite	Consulting and cooperation body at the national level on economic and social develop-ment. Recommend ations in the field of the state budget and proposals for legal regulations applying to economic, social, working and wage conditions. Supports collective bargaining	n.d.	n.d.	n.d.

Note: n.d., no data.

Source: Network of Eurofound Correspondents, 2023.

In Belgium, France, Italy, Latvia and Spain, the main sector-related organisations are also members of paritarian organisations (Table 25). The recently established paritarian organisations of Belgium (2017 agreement) and France (2019 MEB) are involved in activities related to vocational education and training and to employment/unemployment. In Latvia, LIA (trade union) and VRUA (employer organisation) – sector-related social partners with currently no members – have been members of the Sectoral Expert Council on the Manufacture of Textiles, Clothing, Leather and Leather Products since 2017. That is a three-way cooperation platform between the state, sectoral employer organisations and trade unions, focused on vocational education and training. In Italy and Spain, paritarian organisations are older and cover a wider range of activities (pension funds, healthcare and provident funds, paid holiday schemes, occupational health activities, vocational education and training, employment and unemployment, gender equality).

Table 25: Paritarian organisations in the sector

Member State	Name of the organisation	Origin: agreement/ statutory	Establishment year	Domain of activities	Participating trade unions	Participating employer organisations
BE	(Subsistence Security Fund for the Hide and Leather industry and Substitute Products	MEB	2017	Employment and unemployment	ACV-BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Ledercuir
ES	Joint commission responsible for interpreting, monitoring, and mediating the national sectoral collective agreement	Multi-sectoral bargaining	2007	Paid holiday schemes, occupational health activities, vocational education and training, employment and unemployment, gender equality	CCOO-Industria, UGT-FICA	FICE, AEC
FR	OPCO 2i	MEB	2019	Vocational education and training, employment and unemployment	FS-CFDT, CFTC-CMTE, THCB-CGT, FO Pharmacie, Cuir, Habillement, CFE-CGC Agro	FFC
IT	EBNA	National Bilateral Handicrafts Organisation	1995	Pension funds, healthcare and provident funds, paid holiday scheme, occupational health activities, vocational education and training, employment	CGIL, CISL, UIL	Confartigianato, Casartigiani, CNA, CLAAI

				and unemployment		
LV	Sectoral Expert Council on the Manufacture of Textiles, Clothing, Leather and Leather Products	Statutory	2017	Vocational education and training	LIA	VRUA

Source: Network of Eurofound Correspondents, 2023.

3. European level of representation

Sections 3.1 to 3.5 of this chapter on the European level of interest representation in the footwear sector analyse the membership domain, membership strength and status of the national social partners affiliated to the European social partner organisations, with a particular focus on affiliation to industriAll Europe (on the worker side) and CEC (on the employer side). Sections 3.6 and 3.7 provide an overview of industriAll Europe's and CEC's capacity to negotiate and the effective participation of national social partners in the footwear ESSDC's meetings.

IndustriAll Europe is affiliated to the European Trade Union Confederation (ETUC) and organises workers across the EU in the manufacturing, mining and energy sectors of the economy, with a multi-sectoral membership domain that extends far beyond the footwear sector (only members with a domain related to the footwear sector are included in this overview report). CEC represents the interests of national employer organisations in the European footwear sector, organising the entire footwear industry. Both industriAll Europe and CEC are listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU.

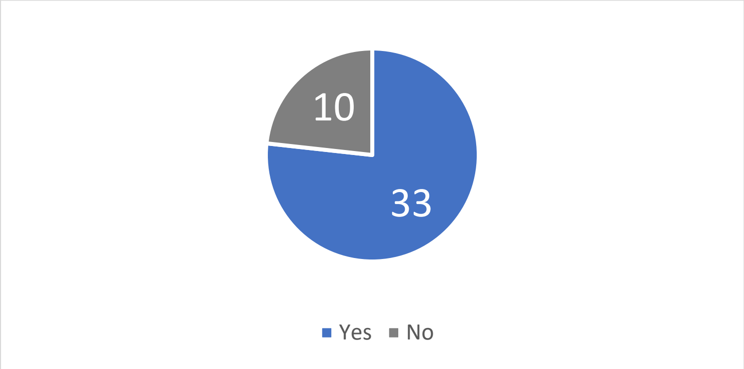
3.1. Representativeness of industriAll Europe

Figure 4 presents the share and number of sector-related trade unions represented by industriAll Europe, and industriAll Europe coverage across Member States, drawn from the national contributions. Of the 43 sectoral trade unions identified in Chapter 2, 33 (77 %) are affiliated to industriAll Europe, in 17 Member States (of the 20 with sector-related trade unions). Compared with the previous representativeness study, as indicated above, there has been a reduction in the numbers of members and Member States covered, for a number of reasons, including the exclusion of the United Kingdom (following Brexit) and Cyprus (due to the minimal representation of the sector in the Member State). In addition, two unions mentioned in the previous study in Lithuania (LPIPS Solidarumas) and Poland (FNSZZPL) indicate that they no longer have members in the sector. Both unions are therefore not included in this report despite being members of industriAll Europe, again reducing the Member State coverage. GPA-djp in Austria and FLI Podkrepa in Bulgaria are also reported as not having any members in the footwear sector, leaving only FOSIL representing workers in the sector in Bulgaria. Both GPA-djp and FLI Podkrepa are no longer listed as members of industriAll Europe for the sector. In Spain, ELA IE is currently not involved in collective agreements in the sector, and in Finland TEAM is now part of Teollisuusliitto. Both do not appear on the list of industriAll Europe members for the sector. In Romania, PF is also no longer representative or a member of the sector. In Belgium, CNE-LBC and SeCta-BBTK are no longer mentioned, since unions have centralised social dialogue responsibilities and activities in the footwear sector have been transferred to ACV-BIE and ABVV-FTGB ACCG. On the other hand, in Denmark, CO-Industri is newly listed as a member of industriAll Europe for the sector because of its involvement in collective bargaining, and in Slovakia OZ KOVO is an additional member.

No sector-related trade unions are present in Latvia, Lithuania or Poland, while in Croatia, Czechia and Greece sector-related trade unions are active but not affiliated to industriAll Europe. Multiple trade unions are members of industriAll Europe in 10 Member States (Belgium, Denmark, Finland, France, Italy, the Netherlands, Portugal, Slovakia, Spain and Sweden), where 32 of the 33 trade unions are directly affiliated to industriAll Europe, while 3F in Denmark is indirectly (via CO-industri) affiliated to the European-level federation. ACV-BIE in Belgium is also affiliated to EFBH and UNI Europa.

Figure 4: Share (and number) of trade unions organising workers in the footwear sector represented by industriAll Europe

77 % (33) of 43 trade unions with members in the footwear sector are affiliated to industriAll Europe



industriAll Europe coverage by Member State (of the EU-27)		
AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Note: Blue-shaded cells are used for Member States with at least one trade union in the footwear sector represented by industriAll Europe; cells highlighted in dark grey represent Member States in which there are no footwear-manufacturing activities; cells highlighted in light grey represent Member States in which there are no trade unions active in the footwear sector; cells with no shading indicate Member States in which there are footwear trade unions, but they are not affiliated to industriAll Europe.

Source: Based on data in Table *10*.

In terms of membership domain, Table 26 and Table 27 provide an overview of the parts of the footwear sector and the types of workers and companies in which the affiliated trade unions have members. Workers in the subsector related to the manufacturing of classic and leisure shoes are covered by all sector-related trade unions affiliated to industriAll Europe with available data, and around 70 % of trade unions cover workers in the production of athletic and sports shoes and of safety shoes (in 14 and 12 Member States, respectively). The production of bespoke and artisanal shoes, of orthopaedic shoes and of shoe components are covered by 51 % to 70 % of the affiliated trade unions (respectively 17, 23 and 20 trade unions out of 33). The members of industriAll Europe have a higher membership density than the average for the 43 trade unions active in the footwear sector.

Table 26: Sector coverage of trade unions affiliated to industriAll Europe for the footwear sector

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
AT	PROGE	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Blue-collar workers, apprentices and retirees in the private sector in metalworking, mining, energy, textiles and leather, agriculture, food processing, tobacco, chemicals, glass production, paper, vulcanisation, mineral oil, gas, temporary agency work	industriAll Europe
BE	ACLVB-CGSLB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Construction, energy, industrial sectors	industriAll Europe
	ACV-BIE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Almost all sectors	industriAll Europe, EFBH, UNI Europa
	ABVV-FGTB ACCG	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Mainly production and industrial sectors	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
BG	FOSIL	Yes	Yes			Not present			Textiles and clothing, glass and ceramics, electronics, household engineering	industriAll Europe
DE	IG BCE	Yes	Yes	Yes	Yes			Yes	Mining, chemicals, pharmaceuticals, man-made fibres, energy, glass, rubber, ceramics, plastic processing, leather, petrol, paper, recycling and water	industriAll Europe
DK	CO-industri	Yes	Yes	Yes	Yes	Yes	Not present	Yes ([1])	Entire manufacturing sector	industriAll Europe
	3F	Yes	Yes	Yes	Yes	Yes	Not present	Yes ([1])	Blue-collar workers in both the private and public sectors	industriAll Europe ([2])
EE	ETTAF	Yes						Yes ([1])	Light industry: manufacture of wearing apparel, manufacture of food products, manufacture of chemicals and chemical products	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
ES	CCOO-Industria	Yes	Yes	Yes	Yes		Yes	Yes (1)	Textiles, leather and tanning, other industrial sectors	industriAll Europe
	UGT-FICA	Yes	Yes	Yes	Yes		Yes	Yes (1)	Agri-food, capital goods and ICT, construction and mining, energy and water, automotive, chemical, textiles, leather, graphic arts, iron and steel	industriAll Europe
FI	Teollisuusliitto	Yes	Yes	Yes	Yes		Yes	Yes	Textiles, leather and tanning, chemicals, technology, wood products	industriAll Europe
	PRO	Yes	Yes		Yes			Yes	White-collar workers in industry, finance, services, ICT and communication, public sector, textiles, leather and tanning	industriAll Europe
FR	CGT-THCB	Yes		Yes	Yes	Yes	Yes	Yes (1)	Textiles, leather, laundry	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
	FS-CFDT	Yes		Yes	Yes	Yes	Yes	Yes ([1])	No	industriAll Europe
	FO Chimie	Yes		Yes	Yes	Yes	Yes	Yes ([1])	Commerce, hospitality, services, etc.	industriAll Europe
	CFTC-CMTE	Yes		Yes	Yes	Yes	Yes	Yes ([1])	Metal, energy, textiles	industriAll Europe
	CFE-CGC AGRO/SNCEA	Yes		Yes	Yes	Yes	Yes	Yes ([1])	Agriculture, agri-food industry	industriAll Europe
HU	BDSZ	Yes	Yes					Yes ([1])	Textiles, garments, leather, mining, energy	industriAll Europe
IT	Filctem CGIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Chemicals, energy, leather and tanning	industriAll Europe
	FEMCA CISL	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Chemicals, energy, textiles	industriAll Europe
	Uiltec UIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Chemicals, fashion, energy, leather and tanning, textiles	industriAll Europe
NL	FNV	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	All sectors	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
	CNV	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	All sectors	industriAll Europe
PT	FESETE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Textiles, clothing, leather and tanning, related sectors	industriAll Europe
	Sindeq	Yes	Yes						Chemicals, energy, textiles, others	industriAll Europe
	SIMA	Yes	Yes						Manufacturing of metal, electronics, chemicals, pharmaceuticals, paper, concrete and dairy products; graphical, transport, human health, others	industriAll Europe
RO	Confpeltex	Yes	Yes	Yes	Yes		Yes	Yes ([1])	Leather and tanning	industriAll Europe
SE	Unionen	Yes	Yes	Yes	Yes	Yes	Yes	Yes	White-collar workers in all sectors	industriAll Europe
	IF Metall	Yes	Yes	Yes	Yes		Yes	Yes	Industry, mining, steel, manufacturing	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
SI	STUPIS	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Textiles, leather and tanning	industriAll Europe
SK	IOZ	Yes	Yes		Yes			Yes (1)	Transport, construction	industriAll Europe
	OZ KOVO	Yes	Yes					Yes (1)	Metal, glass, services, road transport, others	industriAll Europe

(1) Manufacture of finished leather goods is not part of the footwear sector.

(2) Via CO-industri.

Note: n.d., no data.

Source: Network of Eurofound Correspondents, 2023.

Table 27: Categories of workers covered by trade unions affiliated to industriAll Europe for the footwear sector

	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Educational level			Company size group (number of employees)			
						Primary	Secondary	Tertiary	1–9	10–49	50–249	250+
Number of trade unions	31	7	5	17	21	24	29	17	24	25	25	20
Number of Member States	17	4	2	8	11	13	15	8	11	12	13	12

Source: Network of Eurofound Correspondents, 2023.

Employees are represented by all affiliated trade unions, in all Member States, while only seven trade unions in four Member States represent self-employed workers (in Finland, Italy, the Netherlands and Sweden). Owners of their own businesses with employees are covered only by affiliated trade unions (Filctem CGIL, FEMCA CISL and Uiltec UIL in Italy; FNV and CNV in the Netherlands), except for FILP-CISAL in Italy, which has no European affiliation. Managers and other staff in the sector are represented by 17 and 22 sector-related trade unions, respectively. Coverage of workers with primary- and secondary-level education appears to be higher in the group of trade unions affiliated to industriAll Europe with respect to the overall pool of trade unions, while workers who have completed tertiary education are represented by 52 % of affiliated trade unions (in 8 Member States), compared with 53 % of the 43 sector-related trade unions identified in Chapter 2.

Overall, 27 of the 33 trade unions affiliated to industriAll Europe are the largest or second largest sector-related organisations (Table 28), and the time patterns of membership strength in the last two to three years appear to be mostly stable or decreasing (except for Sindeq and SIMA in Portugal and OZ KOVO in Slovakia).

Table 28: Overview of industriAll Europe-affiliated trade unions' membership strength in the footwear sector

	Total	Trend	Ranking in the entire footwear sector
Number of trade unions	33	Increasing: 3 Stable: 8 Decreasing: 9 No data: 13	Largest: 19 Second largest: 8 No data: 0
Number of Member States	17		
Member States with no trade unions	LT, LV, PL		

Source: Network of Eurofound Correspondents, 2023.

Looking at trade unions' involvement in collective bargaining (Table 29), almost all members of industriAll Europe are recognised as representative at the national level (except for OZ KOVO in Slovakia and ETTAF in Estonia, where no legal requirements for representativeness exist), and all participate in collective bargaining, except in those Member States where collective bargaining currently does not take place in the footwear sector (Bulgaria, Estonia, Greece and the Netherlands). MEB is relatively more diffused than SEB among industriAll Europe members (25 versus 19 trade unions involved), and 16 of the 33 industriAll Europe members are involved in both SEB and MEB (in Belgium, Denmark, France, Italy, Slovenia, Spain and Sweden). Around half of the trade unions affiliated to industriAll Europe are consulted by the government and involved in some form of industrial action. All industriAll Europe members also have an affiliation to national associations, except for IOZ in Slovakia and SIMA in Portugal.

Table 29: Overview of industriAll Europe-affiliated trade unions' involvement in collective bargaining in the footwear sector

	Trade union recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	Involved in industrial action	National affiliation
Number of trade unions	31	25	19	20	17	15	31
Number of Member States	16	11	10	10	10	8	17
Member States with no trade unions recognised as representative	8	13	14	14	14	16	7

Note: In Bulgaria and the Netherlands no collective bargaining currently takes place in the sector, but FOSIL, FNV and CNV are in principle representative for the footwear sector and are cross-industry national trade unions. In Romania, the trade union Confpeltex is consulted by the government through the National Trade Union Confederation (ALFA).

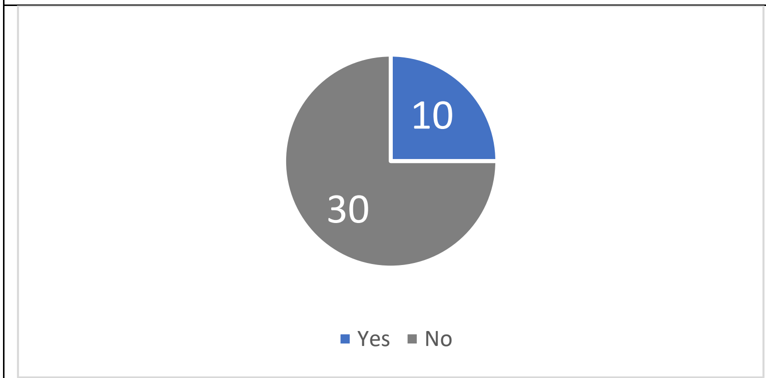
Source: Network of Eurofound Correspondents, 2023.

3.2. Representativeness of CEC

The share and number of sector-related employer organisations represented by CEC, and its coverage across Member States, are presented in Figure 5. Of the 40 sector-related employer organisations identified in Chapter 2, only 10 (25 %) are affiliated to CEC, in 10 Member States, with no Member States showing multiple memberships. No sector-related employer organisations are present in Estonia, Latvia, the Netherlands, Romania or Slovakia. In Romania, the former member of CEC, Sfera Factor, is no longer active. In Czechia, ČOKA was identified at the national level during the process of the previous representativeness study but was not included, since it is a business association not involved in collective bargaining. The organisation joined CEC in 2018 and is hence now included. In Belgium, FEBIC, the organisation mentioned in the 2017 report, which was a member of CEC, ceased to exist. Another organisation, Ledercuir, was identified but is not a member of CEC. Many of the newly included organisations in Denmark, Finland, Hungary, Italy, Poland and Sweden have members in the sector but are relatively small and are largely business associations and therefore not involved in collective bargaining in the sector.

Figure 5: Share (and number) of employer organisations organising companies in the footwear sector represented by CEC, EU-23

25 % (10) of 40 employer organisations with member companies in the footwear sector are affiliated to CEC



CEC coverage by Member State (of the EU-27)		
AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Note: Blue-shaded cells are used for Member States with at least one employer organisation in the footwear sector represented by CEC; cells highlighted in dark grey represent Member States in which there are no footwear-manufacturing activities; cells highlighted in light grey represent Member States in which there are no employer organisations active in the footwear sector; cells with no shading indicate Member States in which there are employer organisations representing footwear companies, but they are not affiliated to CEC.

Source: Based on data in Table 15.

In terms of membership domain, companies in the subsectors related to the manufacturing of classic and leisure shoes and of safety shoes are covered by all sector-related employer organisations affiliated to CEC (Table 30). Companies producing orthopaedic shoes and finished leather goods are represented by 6 of the 10 employer organisations, while bespoke shoes and shoe components are covered by 7 employer organisations. Overall, each employer organisation covers at least three subsectors of footwear manufacturing, and ČOKA in Czechia, ELSEVIE in Greece, PIPS in Poland and APICCAPS in Portugal represent employers in the whole sector. In 5 of the 10 CEC members, other sectors of the broad TCLF sector are covered, and ČOKA in Czechia also represents employers in commerce.

Table 30: Sector coverage of employer organisations affiliated to CEC

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
CZ	ČOKA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (commerce)	CEC
EL	ELSEVIE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	CEC
ES	FICE	Yes	Yes	Yes	Yes	Yes		([1])	No	CEC
FI	AFLSI	Yes			Yes		Yes	Yes	Yes (leather and tanning)	CEC
FR	FFC	Yes			Yes	Yes	Yes	Yes ([1])	No	CEC
HR	HUP UTKI	Yes	Yes		Yes				Yes (textiles, leather and tanning)	CEC, Euratex, SMEUnited, BusinessEurope
HU	MKSZ	Yes	Yes		Yes		Yes		Yes (leather and tanning, textiles and garments)	CEC
IT	Assocalzaturifici	Yes	Yes	Yes	Yes	Yes	No	No	No	CEC
PL	PIPS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (leather, tanning, leather goods, components, research and development centres)	CEC

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
PT	APICCAPS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	CEC

([1]) Manufacture of finished leather goods is not part of the footwear sector.

Source: Network of Eurofound Correspondents, 2023.

Self-employed shoemakers are represented by FICE in Spain, Assocalzaturifici in Italy, PIPS in Poland and APICCAPS in Portugal, while micro- and small companies are covered by all employer organisations, except HUP UTKI in Croatia and MKSZ in Hungary, which only represent medium-sized and large companies (Table 31). Companies with 50–249 employees are represented by all sector-related members of CEC, while large companies are not covered in Czechia and Greece.

Table 31: Categories of companies covered by sectoral employer organisations affiliated to CEC

	Self-employed shoemakers	Micro-companies (1–9)	Small companies (10–49)	Medium-sized companies (50–249)	Large companies (250+)
Number of employer organisations	4	8	8	10	8
Number of Member States	4	8	8	10	8

Source: Network of Eurofound Correspondents, 2023.

All employer organisations affiliated to CEC are the largest sector-related organisations (Table 32), and the time patterns of membership strength in the last two to three years appear to be mostly stable (except for ČOKA in Czechia, whose membership slightly increased).

Table 32: Overview of CEC-affiliated employer organisations' membership strength in the footwear sector

	Total	Trend	Ranking in the entire footwear sector
Number of employer organisations	10	Increasing: 1 Stable: 6 Decrease: 0 No data: 3	Largest: 10 Second largest: 0 No data: 0
Number of Member States	10		
Member States with no employer organisations	EE, LV, NL, RO, SK		

Source: Network of Eurofound Correspondents, 2023.

Table 33 presents an overview of CEC-affiliated employer organisations' involvement in collective bargaining in the footwear sector. All CEC members are recognised as representative at the national level (in Greece, at the institutional level, employer organisations are involved in collective bargaining and considered representative, but no collective bargaining has taken place in the sector since 2009), and half participate in collective bargaining. No collective bargaining involvement is found for ČOKA in Czechia, HUP UTKI in Croatia (where no collective bargaining takes place at the sectoral level, but the employer organisation supports companies in collective bargaining), ELSEVIE in Greece, MKSZ in Hungary and PIPS in Poland. Except for ČOKA, all CEC members with no involvement in collective bargaining in the footwear sector are found in Member States where collective bargaining takes place only at the company level. Moreover, all sector-related CEC members involved in collective bargaining are involved in MEB. No employer organisation affiliated to CEC is involved in SEB.

Of the employer organisations affiliated to CEC, six are involved in social dialogue, while seven are consulted by the government (except for AFLSI in Finland and MKSZ in Hungary); ELSEVIE at the institutional level is involved in social dialogue and consulted by the government. Except for ELSEVIE in Greece and FICE in Spain (for which no information is available), all sector-related members of CEC are also affiliated to a cross-sectoral national organisation.

Table 33: Overview of CEC affiliated employer organisations' involvement in collective bargaining in the footwear sector

	Employer organisation recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	National affiliation
Number of employer organisations	10	5	0	6	7	8
Number of Member States	10	5	0	6	7	8
Member States with no employer organisations recognised as representative	15	19	24	18	17	16

Source: Network of Eurofound Correspondents, 2023.

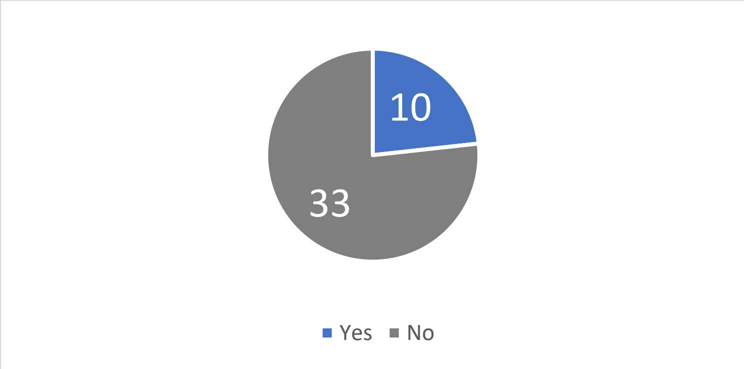
3.3. Trade unions not represented on the ESSDC

The share of sector-related trade unions not represented by industriAll Europe is below 25 %: 10 of the 43 identified trade unions, in Austria, Croatia, Czechia, Greece, Finland, Italy and Slovenia (Figure 6). OS TOK in Czechia is a member of industriAll Europe, but not for the footwear sector. All these organisations also have affiliations to national associations.

Table 34 and Table 35 provide an overview of the parts of the footwear sector and the types of workers and companies covered by trade unions not represented on the footwear ESSDC. Also in this case, workers in the subsector related to the manufacturing of classic and leisure shoes are covered by all sector-related trade unions with available data, and 7 of the 10 trade unions not represented on the footwear ESSDC cover workers in the production of athletic and sports shoes and of safety shoes. The production of bespoke and artisanal shoes is covered by 4 of the 10 trade unions (in Croatia, Greece and Slovenia), and 6 of the 10 trade unions cover the production of shoe components (in Austria, Croatia, Greece and Slovenia). OEKIDE in Greece is the only trade union covering workers in the production of orthopaedic shoes, while the manufacture of finished leather goods is covered by almost all trade unions.

Figure 6: Share (and number) of trade unions organising workers in the footwear sector not represented on the footwear ESSDC

23 % (10) of 43 trade unions with members in the footwear sector are not represented on the ESSDC



Trade unions not affiliated to industriAll Europe by Member State (of the 23 applicable)		
AT	**ES**	**LV**
BE	**FI**	**MT**
BG	**FR**	**NL**
CY	**HR**	**PL**
CZ	**HU**	**PT**
DE	**IE**	**RO**
DK	**IT**	**SE**
EE	**LT**	**SI**
EL	**LU**	**SK**

Note: Blue-shaded cells are used for Member States with at least one trade union in the footwear sector represented by industriAll Europe; cells highlighted in dark grey represent Member States in which there are no footwear-manufacturing activities; cells highlighted in dark grey represent Member States in which there are no trade unions active in the footwear sector; cells with no shading indicate Member States in which there are footwear trade unions, but they are not affiliated to industriAll Europe.

Source: Based on data in Table 10.

Table 34: Sector coverage of trade unions not represented on the footwear ESSDC

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manu-facture of finished leather goods	Other sectors covered	European affiliation
AT	GPA	Yes	Yes		Yes		Yes	Yes (1)	White-collar workers in almost all sectors	n.d.
CZ	OS TOK	Yes						Yes (1)	Textiles	industriAll Europe (2)
EL	OEKIDE	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Textiles, leather and tanning	No
FI	Tradenomit	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	Business administration in all industries and sectors	No
	YTN	Most likely	Most likely		Most likely				Senior salaried workers with an academic background in the chemical sector, ICT, the energy sector, finance and technology	No
HR	SIND TOKG	Yes	Yes		Yes	Yes	Yes	Yes (1)	Textiles, rubber, leather and tanning	No
IT	FILP-CISAL	n.d.		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No
SI	TU Independence Alpina Žiri	Yes	Yes		Yes	Yes	Yes	Yes (1)		No
	TU Alpina Žiri	Yes	Yes		Yes	Yes	Yes	Yes (1)		No
	TU Planika Turnišče	Yes	Yes		Yes		Yes	Yes (1)		No

(1) The manufacture of finished leather goods is not part of the footwear sector.

(2) industriAll Europe affiliate but not for the footwear sector.
Note: n.d., no data.

Source: Network of Eurofound Correspondents, 2023.

Table 35: Categories of workers covered by trade unions not affiliated to industriAll Europe for the footwear sector

	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Educational level			Company size group (number of employees)			
						Primary	Secondary	Tertiary	1–9	10–49	50–249	250+
Number of trade unions	8	2	1	5	9	6	7	6	2	2	5	3
Number of Member States	6	2	1	4	6	4	5	5	2	2	5	2

Source: Network of Eurofound Correspondents, 2023.

Employees are represented by eight affiliated trade unions, in all Member States except Finland (employees are covered by the largest trade unions, which have European affiliations), while only GPA in Austria and FILP-CISAL in Italy represent self-employed workers. FILP-CISAL in Italy also represents owners of their own businesses with employees. Compared with trade unions affiliated to industriAll Europe, the organisations not represented on the ESSDC present significantly higher coverage of other categories of workers; all trade unions for which data are available represent other staff in the sector, and six of the eight trade unions for which data are available represent workers with tertiary education. Looking at company size, medium-sized and large companies appear to be better covered by trade unions not represented on the ESSDC; all seven trade unions for which data are available cover workers in companies with 50 or more employees. Conversely, only GPA in Austria and OEKIDE in Greece cover micro- and small companies.

OEKIDE in Greece, OS TOK in Czechia and SIND TOKG in Croatia are the only sector-related trade unions (thus the largest), and GPA in Austria is the second largest trade union in the sector, while all other trade unions are small. The membership of trade unions not affiliated to industriAll Europe has been generally stable or decreasing in the last two to three years (Table 36).

For FILP-CISAL in Italy and Tradenomit in Finland, data on membership domain and strength are often not available. Tradenomit covers workers in business administration in all sectors, but the only information available for the footwear sector is that it covers workers with tertiary education and is not involved in collective bargaining. FILP-CISAL is a cross-sectoral trade union covering professionals (both employees and self-employed), but no information is available on the membership domain in the footwear sector. It is recognised as a representative organisation in the footwear sector, based on mutual recognition, and is a signatory of a sectoral collective agreement for craftwork in the broad TCLF sector (with an estimated coverage of less than 1 % of the footwear workforce).

Table 36: Overview of membership strength of the trade unions not represented on the footwear ESSDC

	Total	Trend	Ranking in the entire footwear sector
Number of trade unions	10	Increasing: 0 Stable: 4 Decreasing: 2 No data: 4	Largest: 3 Second largest: 2 No data: 1
Number of Member States	7		
Member States with no trade unions	LT, LV, PL		

Source: Network of Eurofound Correspondents, 2023.

Looking at Table 37, which provides information on the collective bargaining involvement of trade unions not represented on the ESSDC, trade unions in Austria, Croatia, Czechia, Italy and Finland (YTN) are recognised as representative at the national level, while trade unions in Slovenia are not. In Greece, at the institutional level, OEKIDE is involved in collective bargaining and considered representative. All organisations are involved in collective bargaining, except Tradenomit in Finland and TU Independence Alpina Žiri in Slovenia.

MEB and SEB are equally diffused among trade unions not represented on the ESSDC: GPA in Austria, OS TOK in Czechia (only indirectly, through a multi-sectoral collective agreement that is extended to the footwear sector by means of extension mechanisms), YTN in Finland and FILP-CISAL in Italy are involved in MEB; SIND TOKG in Croatia, TU Alpina Žiri and TU Planika Turnišče in Slovenia (each active in only one company) and OS TOK in Czechia (only in one plant) are involved in SEB. Only GPA in Austria and SIND TOKG in Croatia are involved in social dialogue (bipartite or tripartite dialogue outside the framework of collective bargaining).

Table 37: Overview of the involvement in collective bargaining of the trade unions not represented on the footwear ESSDC

	Trade union recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	Involved in industrial action	National affiliation
Number of trade unions	5	4	4	2	0	3	10
Number of Member States	5	4	3	2	0	3	7
Member States with no trade unions	19	20	21	22	24	21	17

Note: Data on representativeness and involvement in collective bargaining, social dialogue and industrial action are not reported for the Greek trade unions' federation OEKIDE, as no collective bargaining or collective agreements have been present in the footwear sector since 2009.

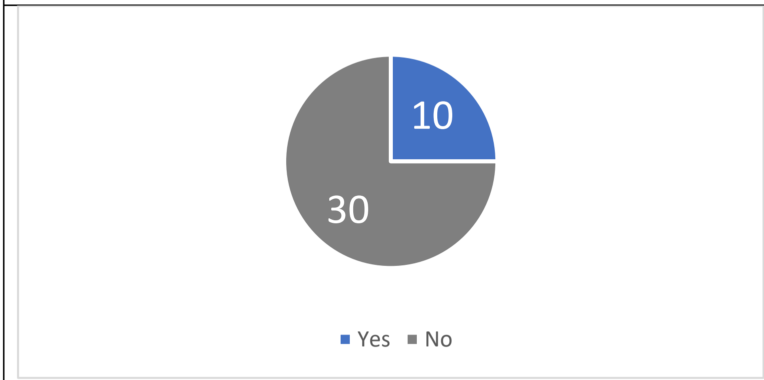
Source: Network of Eurofound Correspondents, 2023.

3.4. Employer organisations not represented on the footwear ESSDC

Of the 40 sector-related employer organisations identified in Chapter 2, 30 (75 %) are not members of CEC, in 15 Member States (Figure 7). FV TBSL in Austria and ATOK in Czechia are affiliated to Euratex (and FV TBSL also to COTANCE); CNA Federmoda in Italy is a member of ACTE and SMEUnited; HDS/L in Germany is affiliated to FESI.

Figure 7: Share (and number) of employer organisations organising companies in the footwear sector not represented on the footwear ESSDC

75 % (30) of 40 employer organisations with member companies in the footwear sector are not represented on the ESSDC



Coverage of employer organisations with no CEC affiliation by Member State (of the 23 applicable)		
AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Note: Blue-shaded cells are used for Member States with at least one employer organisation in the footwear sector represented by CEC; cells highlighted in dark grey represent Member States in which there are no footwear-manufacturing activities; cells highlighted in light grey represent Member States in which there are no employer organisations active in the footwear sector; cells with no shading indicate Member States in which there are footwear employer organisations, but they are not affiliated to CEC.

Companies in the manufacturing of classic and leisure shoes are represented by almost all employer organisations (Table 38), except for FFPO in France and OCSZ/EOCE in Hungary (only representing companies producing orthopaedic shoes); Københavns Skomagerlaug in Denmark (covering companies producing orthopaedic and bespoke/artisanal shoes); and AEC in Spain (which covers shoe components and the manufacturing of finished leather goods). The membership domain of employer organisations not represented on the ESSDC across the other subsectors of footwear manufacturing is relatively homogeneous, with 18 to 21 employer organisations representing companies in the manufacturing of athletic and sports shoes, orthopaedic shoes, bespoke and artisanal shoes and shoe components.

Full coverage of footwear manufacturing in terms of subsectors is provided by Ledercuir in Belgium, ATOK in Czechia, OVYE in Greece, Uniontessile, Casartigiani, CLAAI and Confartigianato in Italy, OIBS in Poland and all employer organisations in Slovenia.

Most employer organisations are also active in other sectors of the economy (20 out of the 40 sector-related employer organisations), mainly in the broad TCLF sectors, but also in trade (LATIA in Lithuania and PGPO in Poland), audiology, opticians, dental technicians (BIG in Austria), chemical, pharmaceutical, rubber and plastics (IKEM in Sweden) and other manufacturing sectors (ZDS and GZS-ZTOUPI in Slovenia). Casartigiani and CLAAI in Italy are cross-sectoral organisations for craftwork.

Table 38: Sector coverage of employer organisations not represented on the footwear ESSDC

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
AT	FV TBSL	Yes	Yes		Yes		Yes	Yes (1)	Yes (textiles and clothing, including leather and tanning)	Euratex and COTANCE (2)
	BIG	Yes		Yes		Yes	Yes		Yes (audiology, opticians, dental technicians)	No
BE	Ledercuir	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	n.d.
BG	BATOK	Yes	Yes		Yes		Yes	Yes	Yes (clothing)	No
CZ	ATOK (3)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (textiles)	Euratex
DE	HDS/L	Yes	Yes	Yes	Yes	Yes	Yes		Yes (leather goods and luggage, leather- or plastic-processing industry)	FESI
DK	Skobranchen (4)	Yes	Yes		Yes			(1)	No	No
	Danmarks Skomagerlaug	Yes	Yes	Yes	Yes	Yes	Yes	(1)	No	No
	Københavns Skomagerlaug			Yes		Yes		(1)	No	No
EL	OVYE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (shoe shops, footwear import–export)	No
ES	AEC						Yes	Yes (1)	Yes (components such as metal accessories, shanks, frames, welts, zippers, linings)	No

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
FR	FFPO			Yes				([1])	No	No
HU	BCE	Yes	Yes		Yes				Yes (leather and tanning)	No
	OCSZ			Yes					No	No
	EOCE			Yes					No	No
IT	CNA Federmoda	Yes	Yes	Yes	Yes		Yes	Yes	Yes (textiles and clothing)	ACTE, SMEUnited
	Uniontessile Confapi	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (textiles)	n.d.
	Casartigiani	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (craftwork in all sectors)	n.d.
	CLAAI	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (craftwork in all sectors)	n.d.
	Confartigianato Moda	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (textiles, clothing, tailors and designers, eyewear, cleaners)	n.d.
LT	LATIA	Yes							Yes (textiles and apparel, education, commerce, consulting)	
PL	PGPO	Yes	Yes			Yes			Yes (leather and tanning, trade and e-commerce)	No
	OIBS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (leather and tanning, wholesaling of hides, skins and raw materials, chemical products, glove	No

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
									and mitten manufacturing, notions and needlework product manufacturing, leather product wholesaling, merchandise wholesaling, management consulting services)	
	Pracodawcy RP	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No
SE	SSMF	Yes	Yes	Yes	Yes	Yes	Yes		No	No
	TEKO	Yes					Yes	Yes	Yes (textiles)	No
	IKEM	Yes		Yes	Yes	Yes	Yes	Yes	Yes (chemicals, pharmaceuticals, refineries, rubber and plastic)	No
SI	ZDS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (textiles, clothing and leather processing, commerce, agriculture, energy, construction, catering, paper and wood, chemicals, metals, services, traffic, communication)	No
	GZS-ZTOUPI	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (textiles, leather and tanning, paper, metal-	No

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
									and non-metal-processing industry)	
	OPZ	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No

([1]) Manufacture of finished leather goods is not part of the footwear sector.

([2]) Probably not for the footwear sector.

([3]) Via ČOKA. ATOK is oriented mostly towards the textile industry, and it is a signatory of a collective bargaining agreement in the textile sector that was extended to cover the footwear sector.

([4]) The employer organisation probably does not have members within the footwear production sector, because the sector is very small in Denmark. The indication of the parts of the sector covered refers mainly to retail shops.

Source: Network of Eurofound Correspondents, 2023.

Table 39 presents an overview of the membership strength of the employer organisations not represented on the ESSDC, by type/size of company.

Overall, coverage appears to be higher among micro- and small companies (21 employer organisations of the 30 not represented on the ESSDC), while only 27 % of employer organisations represent companies with 250 or more employees (in Austria, Germany, Hungary, Italy, Poland, Slovenia and Spain), and 17 out of 30 represent medium-sized companies.

Compared with CEC members, employer organisations not represented on the ESSDC tend to be smaller (Table 40); only 8 of the 30 are the largest in the sector (the only one in Belgium, Germany and Lithuania), and 6 are the second largest. Membership tends to be stable or decreasing over the last two to three years for almost all organisations (except for BATOK in Bulgaria and PGPO in Poland).

Table 39: Categories of companies covered by sectoral employer organisations not represented on the footwear ESSDC

	Self-employed shoemakers	Micro-companies (1–9)	Small companies (10–49)	Medium-sized companies (50–249)	Large companies (250+)
Number of employer organisations	14	21	21	17	8
Number of Member States	7	11	12	12	7

Source: Network of Eurofound Correspondents, 2023.

Table 40: Overview of membership strength of the employer organisations not represented on the footwear ESSDC

	Total	Trend	Ranking in the entire footwear sector
Number of employer organisations	30	Increasing: 2 Stable: 10 Decreasing: 12 No data: 6	Largest: 8 Second largest: 6 No data: 5
Number of Member States	15		
Member States with no employer organisations	EE, LV, NL, RO, SK		

Source: Network of Eurofound Correspondents, 2023.

Table 41 presents an overview of the collective bargaining involvement of sector-related employer organisations not represented on the ESSDC. At least one employer organisation in each Member State is recognised as representative at the national level, except for Czechia (where ATOK is the only employer organisation not represented on the ESSDC and is not considered a representative social partner for the sector), Greece (where, at the institutional level, OVYE is involved in collective bargaining and considered representative, but no collective bargaining in the sector has taken place since 2009) and Hungary. LATIA in Lithuania only has one company member in the footwear sector, and no formal criteria for sectoral representativeness exist. Overall, 14 of the 30 employer organisations not represented on the ESSDC do not participate in collective bargaining. However, except for Slovenia, where SSMF is not involved in collective bargaining but multi-employer bargaining takes place in the footwear sector, all employer organisations not involved in collective bargaining are active in Member States where (i) collective bargaining does not take place in the sector (Bulgaria, Greece), (ii) employer organisations are not involved in collective bargaining (Denmark and Lithuania) or (iii) no multi-employer collective bargaining takes place (Hungary and Poland). MEB is significantly more diffused than SEB (only HDS/L in Germany, AEC in Spain and CNA Federmoda in Italy). Slightly more than one third of the employer organisations not represented on the ESSDC are involved in social dialogue, while 18 of the 30 employer organisations are consulted by the government in 11 Member States. Only 18 of the 27 employer organisations with available data also have affiliations to national associations. No national affiliation is found for the two shoemakers' guilds in Denmark, FFPO in France, EOCE in Hungary, Casartigiani and CLAAI in Italy, OIBS in Poland or SSMF in Sweden.

Table 41: Overview of involvement in collective bargaining in the footwear sector of the employer organisations not represented on the footwear ESSDC

	EO recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	National affiliation
Number of employer organisations	19	16	3	11	18	18
Number of Member States	11	9	3	8	11	14
Member States with no employer organisations	13	15	21	16	13	10

Source: Network of Eurofound Correspondents, 2023.

3.5. Other European organisations with some sectoral national membership

Around 13 % of the sectoral employer organisations and business associations (5 out of 40) are affiliated to European associations other than CEC (Table 42). The most frequently indicated association is Euratex (in three of the five employer organisations not represented on the ESSDC that are affiliated to European organisations other than CEC). FV TBSL in Austria, HUP UTKi in Croatia and ATOK in Czechia are affiliated to Euratex. FV TBSL is also a member of COTANCE, and HUP UTKI is also a member of SMEUnited and BusinessEurope. HDS/L in Germany is affiliated to FESI, and CNA Federmoda is affiliated to ACTE and SMEUnited.

Table 42: Other European organisations representing employer organisations with footwear member companies

Member States	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
AT	FV TBSL	Yes	Yes		Yes		Yes	Yes ([1])	Yes (textiles and clothing, including leather and tanning)	Euratex and COTANCE ([2])
CZ	ATOK ([3])	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (textiles)	Euratex
DE	HDS/L	Yes	Yes	Yes	Yes	Yes	Yes		Yes (leather goods and luggage, leather- or plastic-processing industry)	FESI
HR	HUP UTKI	Yes	Yes		Yes				Yes (textiles, leather and tanning)	CEC, Euratex, SMEUnited, BusinessEurope
IT	CNA Federmoda	Yes	Yes	Yes	Yes		Yes	Yes	Yes (textiles and clothing)	ACTE, SMEUnited

([1]) Manufacture of finished leather goods is not part of the footwear sector.

([2]) Probably not for the footwear sector.

([3]) Via ČOKA. ATOK is oriented mostly towards the textile industry, and it is a signatory of a collective bargaining agreement in the textile sector that was extended to cover the footwear sector.

Source: Network of Eurofound Correspondents, 2023.

3.6. Capacity to negotiate and represent member organisations

One of the European Commission's criteria for EU-level social partners to be consulted, as described in Decision 98/500/EC, is that:

> *they shall consist of organisations which are themselves an integral and recognized part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States.*
>
> (European Commission, 1998, Article 1 (b))

Based on Article 155 of the TFEU, European sectoral social partner organisations need to prove their capacity to negotiate on behalf of their members and to enter 'contractual relations, including agreements', that is, they must have the capacity to commit themselves and their national affiliates. A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate in accordance with a given mandating procedure.

Eurofound has applied the criterion of the 'capacity to negotiate' to both the EU-level social partner associations and, in the bottom-up approach, the national organisations in order to assess their relevance. Following these arguments, the standard Eurofound methodology for assessing the criteria of being an 'integral … part of Member States' industrial relations' and the 'capacity to negotiate' applies the 'capacity to negotiate agreements' at both the EU and national levels. The mandate or mandating procedure can be either **statutory** (that is, laid down in the constitution of the organisation or annexed to it) or **non-statutory** (that is, laid down in secondary documents, such as rules of procedure, memoranda of understanding or ad hoc decisions by the governing bodies of the organisation). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in matters such as binding agreements, declarations or joint opinions.

In the case of **CEC**, representing the employers in the footwear sector, the by-laws of the organisation have not changed since the previous representativeness study was published in 2017. According to that statutory document, one of CEC's key objectives is to engage in cooperation and dialogue with other footwear sector confederations (Article 4). The General Assembly, comprising all CEC members, is responsible for making policy and strategy decisions (Article 10). The General Secretary, appointed by the Board and elected by the General Assembly, represents the collective interests of CEC members. As outlined in Article 12, the General Secretary's duties include representing the confederation in external matters, executing General Assembly decisions and implicitly participating in European sectoral social dialogue negotiations. However, CEC does not have a permanent mandate for these negotiations. Instead, the relevant bodies, particularly the General Secretary, receive a mandate from the General Assembly on a case-by-case basis. Thus CEC displays a **non-statutory mandate**.

IndustriAll Europe promotes social dialogue at all levels in its statutes. It acts as an agenda setter within sectoral social dialogue and promotes joint strategies for the sustainable development of the textile, clothing, leather and footwear sectors, which are organised by one sector working group according to Article 29 of an Appendix III to the industriAll Europe statutes (2021). Aside from this, involvement in European sectoral social dialogue is not explicitly mentioned in its statutes, but it is clearly indicated by other documentation, including its website ([16]). On this basis, industriAll Europe is not equipped with an explicit permanent statutory mandate to negotiate on behalf of its members on matters relating to European social dialogue. Rather, IndustriAll Europe's statutes provide for detailed mandate procedures in relation to the nominations for the ESSDCs in various sectors in accordance with Appendix II of the statutes. The appendix also stipulates the procedures for deciding on platforms and agreeing on statements as part of sectoral social dialogue, obliging the ESSDC members to 'propose and prepare possible platforms and statements in close cooperation with the Secretariat' of IndustriAll Europe. In doing so, the 'members of the [ESSDC] shall act in line with the policies and

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

procedures as agreed by the Executive Committee and Congress', the highest bodies within the European federation, in order to guarantee the participation of all national member unions in matters of European social dialogue. IndustriAll Europe has, thus, a well-defined procedure for obtaining a mandate and getting European sectoral social dialogue texts approved by its member organisations. It has the capacity to negotiate binding agreements, such as the Negotiation Platform on Silica agreement ([17]), which, however, does not cover workers in the footwear sector. No binding European sectoral social dialogue agreements have yet been reached specifically for the footwear sector. Based on the above, the conclusion is that industriAll Europe displays an **intrinsic capacity to negotiate**.

3.7. Effective participation in the footwear ESSDC meetings

In order to assess the effective participation of industriAll Europe and CEC in the footwear ESSDC, their attendance at the meetings held during 2022, 2023 and 2024 was analysed. Two meetings were held per year (one jointly with the textile, clothing and leather sectors) either face to face or in a hybrid setting.

Table 43: Effective participation in the footwear ESSDC, 2022–2023

	2022	2023	2024
Member States (out of 17) with industriAll Europe-affiliated trade unions participating in the footwear ESSDC	7 Member States: AT, BE ES, FI, HU, IT, PT	10 Member States: AT, BE, BG, DE, ES, FI, HU, IT, PT, SE	8 Member States: AT, BE, BG, DE, ES, HU, IT, PT
Member States (out of 17) where industriAll Europe has an affiliate but no participation in the footwear ESSDC	10 Member States: BG, DE, DK, **EE, FR, NL, RO**, SE, **SI, SK**	7 Member States: DK, **EE, FR, NL, RO, SI, SK**	9 Member States: DK, **EE**, FI, **FR, NL, RO**, SE, **SI, SK**
Member States (out of 10) where CEC members have participated in the footwear ESSDC	7 ([18]) Member States: CZ, EL, ES, HU, IT, PL, PT	6 Member States: CZ, ES, HU, IT, PL, PT	6 Member States: ES, HR, HU, IT, PL, PT
Member States (out of 10) where CEC has an association affiliated but no participation in the footwear ESSDC	3 Member States**: FI, FR, HR**	4 Member States: EL, **FI, FR**, HR	4 Member States: CZ, EL, **FI, FR**

Notes: industriAll Europe members from Denmark only attended TCLF meetings. Red font indicates Member States from which delegates did not attend some footwear ESSDC meetings in the year in question, despite being affiliated to a European social partner organisation participating in the footwear ESSDC; bold font indicates Member States from which delegates never attended the footwear ESSDC meetings between 2022 and 2024.

Source: Authors' compilation using data from European Commission, Directorate-General for Employment, Social Affairs and Inclusion.

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

([18]) In 2022, the Romanian employer organisation Sfera Factor attended the meeting. However, since this organisation has not registered any activity in recent years and is not included on the CEC member list, it has not been included here or in the rest of the study, as previously highlighted.

Table 43 shows that, between 2022 and 2024, trade unions affiliated to industriAll Europe from 7 to 10 Member States have been represented on the tanning and leather ESSDC (and the TCLF ESSDC). IndustriAll members from six Member States (Estonia, France, the Netherlands, Romania, Slovakia and Slovenia) did not attend any of the ESSDC meetings over this period. On the employer side, representative organisations from 6 or 7 Member States participated in each footwear (and TCLF) ESSDC meeting between 2022 and 2024. Members from two Member States (Finland and France) did not attend any meetings during this period.

The situation of each European social partner in the footwear sector, regarding their sector-relatedness, their role in the Member States' social partner structures, their capacity to negotiate agreements on behalf of their members and their adequate structures to ensure effective participation in the work of the footwear ESSDC, is summarised in Table 44.

Table 44: Comparative overview of the social partners in the footwear sector based on Decision 98/500/EC criteria

Criterion	industriAll Europe	CEC	Trade unions not in the footwear ESSDC	Employer organisations not in the footwear ESSDC
Sector-relatedness	33 out of 43	10 out of 33	10 out of 43	23 out of 33
Coverage of Member States	17 out of 23	10 out of 23	7 out of 23	15 out of 23
Capacity to negotiate	Intrinsic capacity to negotiate	Non-statutory mandate with decisions made by assembly on a case-by-case basis	n.a.	n.a.
Adequate structures	7 to 10 Member States have been represented in the footwear and TCLF ESSDCs out of the 17 Member States where industriAll Europe has affiliates	6 or 7 Member States out of the 10 where CEC has members represented the organisation in the ESSDC between 2022 and 2024	n.a.	n.a.

Note: n.a., not applicable.

Conclusion

In 2022, there were 226 650 workers (including self-employed) and more than 16 500 companies active in the European footwear sector, as captured by Eurostat's SBS. Footwear is produced in 23 Member States. No significant footwear-manufacturing activities can be found in Cyprus, Ireland, Luxembourg or Malta; therefore, these Member States have not been covered in the current report. The current study identified 43 sector-related trade unions organising workers in the sector in 20 Member States, and 40 sector-related employer organisations active in 18 Member States. Member States where there are no trade unions are Latvia, Lithuania and Poland, while no active employer organisations have been recorded in Estonia, Latvia, Netherlands, Romania or Slovakia.

Of the 43 sectoral trade unions identified, 33 (77 %) are affiliated to industriAll Europe, in 17 of the 20 Member States with sector-related trade unions. In Croatia, Czechia and Greece sector-related trade unions are active but not affiliated to industriAll Europe. Multiple memberships occur in 10 Member States (Belgium, Denmark, Finland, France, Italy, the Netherlands, Portugal, Slovakia, Spain and Sweden), where 32 of the 33 trade unions are directly affiliated to industriAll Europe, while 3F in Denmark is indirectly (via CO-industri) affiliated to the European-level federation. ACV-BIE in Belgium is also affiliated to EFBH and UNI Europa. Workers who are employed in the sector are represented by all industriAll Europe-affiliated trade unions, in all Member States, while only seven trade unions in four Member States represent self-employed workers (in Finland, Italy, the Netherlands and Sweden). Owners of their own businesses with employees are only covered by affiliated trade unions (in Italy and the Netherlands), while managers and other staff in the sector are represented by 17 and 22 sector-related trade unions, respectively. Overall, 27 of the 33 trade unions affiliated to industriAll Europe are the largest or second largest sector-related organisations.

Looking at trade unions' involvement in collective bargaining, almost all members of industriAll Europe are recognised as representative at the national level (except for OZ KOVO in Slovakia and ETTAF in Estonia, where no legal requirements for representativeness exist), and all participate in collective bargaining, except in those Member States where collective bargaining currently does not take place in the footwear sector (Bulgaria, Estonia, Greece and the Netherlands). Sector-level bargaining is more widespread than company-level bargaining among industriAll Europe members (25 versus 19 trade unions involved), and 16 of the 33 industriAll Europe members are involved in both sector- and company-level bargaining (in Belgium, Denmark, France, Italy, Slovenia, Spain and Sweden). Around half of the trade unions affiliated to industriAll Europe are consulted by the government and involved in some form of industrial action. All industriAll Europe members also have an affiliation to national associations, except for IOZ in Slovakia and SIMA in Portugal.

In terms of future capacity building, the share of sector-related trade unions not represented by industriAll Europe is below 25 %, representing 10 of the 43 trade unions identified, in Austria, Croatia, Czechia, Finland, Greece, Italy and Slovenia. OS TOK in Czechia is a member of industriAll Europe, but not for the footwear sector. All these organisations also have affiliations to national associations.

Based on the findings documented in this study, it can be concluded that industriAll Europe is the **most representative** European trade union organisation in the footwear sector (see also Table 44 above).

Of the 40 sector-related employer organisations identified in Chapter 2, 10 (25 %) are affiliated to CEC, in 10 Member States, with no Member States recording multiple memberships. CEC has no members in the following Member States in which there are sector-related employer organisations: Austria, Belgium, Bulgaria, Denmark, Germany, Lithuania, Slovenia and Sweden.

All CEC members are recognised as representative at the national level (in Greece, at the institutional level, employer organisations are involved in collective bargaining and considered representative, but no collective bargaining has taken place in the sector since 2009), and half participate in collective bargaining. No involvement in collective bargaining is found for ČOKA in Czechia, HUP UTKI in Croatia (where no bargaining is available at the sectoral level, but the employer organisation supports companies in collective bargaining), ELSEVIE in Greece, MKSZ in Hungary and PIPS in Poland. Except for ČOKA, all CEC members with no involvement in collective bargaining in the footwear sector are found in Member States where bargaining only takes place at the company level. Moreover, all sector-related CEC members involved in collective bargaining are involved in MEB.

Around 13 % of the sectoral employer organisations and business associations (5 out of 40) are affiliated to European associations other than CEC. The most frequently indicated association is Euratex (in three of the five employer organisations not represented on the ESSDC). HDS/L in Germany is affiliated to FESI, CNA Federmoda in Italy is affiliated to ACTE and SMEUnited, and FV TBSL in Austria is affiliated to both Euratex and COTANCE.

Based on the findings documented in this study, it can be concluded that CEC is the **most representative** European employer organisation for the footwear sector (see also Table 44 above).

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All Eurofound publications are available at www.eurofound.europa.eu.

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Annex

Table 45: Sector-related social partners – full names and abbreviations

Member State	Abbreviation / original name	Full name / English translation
AT	BIG	Federal Guild of Health Professions
	FV TBSL	Austrian Association of the Textile, Clothing, Shoe and Leather Industry
	GPA	Union of Salaried Employees
	PROGE	Production Trade Union
BE	ABVV-FGTB ACCG	General Labour Federation of Belgium
	ACLVB-CGSLB	General Federation of Liberal Trade Unions of Belgium
	ACV-BIE	ACV Construction Industry and Energy
	Ledercuir	Ledercuir
BG	BATOK	Bulgarian Association for Textile, Apparel and Leather
	FOSIL	Federation of the Independent Trade Union Organisations in Light Industry
CZ	ATOK	Association of Textile, Clothing and Leather Industry
	ČOKA	Czech Footwear and Leather Association
	OS TOK	Trade Union of Workers in Textile, Clothing and Leather Industry of Bohemia and Moravia
DE	HDS/L	Federal Association of the Footwear and Leather Goods Industry
	IG BCE	Mining, Chemicals and Energy Industrial Union
DK	3F	Confederation of Danish Employers
	CO-industri	Central Organisation of Employees in Denmark
	Danmarks Skomagerlaug	Shoemakers' Guild of Denmark
	Københavns Skomagerlaug	Shoemakers' Guild of Copenhagen
	Skobranchen	Danish Shoe Retailers Association
EE	ETTAF	Federation of Estonian Industry Workers' Trade Unions
EL	ELSEVIE	Hellenic Association of Footwear Manufacturers and Exporters
	OEKIDE	Federation of Workers in the Textile, Clothing and Leather Industry
	OVYE	Federation of Footwear Manufacturers of Greece
ES	AEC	Spanish Association of the Footwear Components Industry
	CCOO-Industria	Trade Union Confederation of Workers' Commissions
	FICE	Spanish Federation of the Footwear Industry

	UGT-FICA	Industry Federation and Agricultural Workers of the General Workers' Confederation
FI	AFLSI	Association of Finnish Leather and Shoe Industry
	PRO	Trade Union PRO
	Teollisuusliitto	Industrial Union
	Tradenomit	Tradenomit
	YTN	Federation of Professional and Managerial Staff
FR	CFE-CGC AGRO/SNCEA	National Union of Agricultural Business Managers of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CFTC-CMTE	Chemicals, Mining, Textiles and Energy Federation of the French Christian Workers' Confederation
	CGT-THCB	Textile, Clothing, Leather and Laundry Federation of the General Confederation of Labour
	FFC	French Federation of the Footwear Industry
	FFPO	French Federation of Podiatrists
	FO Chimie	Force Ouvrière – Chemical industries of the General Confederation of Labour
	FS-CFDT	Services Federation of the French Democratic Confederation of Labour
HR	HUP UTKI	Croatian Employers' Association of the Textile and Leather Industry
	SIND TOKG	Trade Union of Textile, Footwear, Leather and Rubber Sectors of Croatia
HU	BCE	Leather and Footwear Association
	BDSZ	Mining, Energy and Industry Workers' Trade Union Confederation
	EOCE	Custom Orthopaedic Shoe Manufacturers Association
	MKSZ	Association of Hungarian Light Industry
	OCSZ	Association of Orthopaedic Shoemakers
IT	Assocalzaturifici	Footwear Manufacturers Association
	Casartigiani	Autonomous Confederation of Artisan Unions
	CLAAI	Confederation of Free Italian Artisan Associations
	CNA Federmoda	National Confederation of Artisans and Small and Medium-sized Enterprises – Federmoda
	Confartigianato Moda	General Italian Confederation of Artisans – Fashion
	FEMCA CISL	Federation of Energy, Fashion, Chemical and Related Sector Workers of the Italian Confederation of Workers' Unions
	Filctem CGIL	Italian Federation of the Chemical, Textile, Energy and Manufacturing Workers of the Italian General Confederation of Labour
	FILP-CISAL	Italian Federation of Professional Workers of the Italian Confederation of Autonomous Workers' Unions
	Uiltec UIL	Italian Union of Textile, Energy and Chemical Workers
	Uniontessile Confapi	National Union of Small and Medium-sized Enterprises in the Textiles and Clothing Industry
LT	LATIA	Lithuanian Apparel and Textile Industry Association
NL	CNV	Christian Trade Union Federation

	FNV	Netherlands Trade Unions Federation
PL	OIBS	Polish Chamber of the Leather Industry
	PGPO	Polish Group of Shoe Manufacturers
	PIPS	Polish Chamber of Shoe and Leather Industry
	Pracodawcy RP	Employers of Poland
PT	APICCAPS	Portuguese Footwear, Components and Leather Goods Manufacturers' Association
	FESETE	Federation of Service Workers' and Technicians' Unions
	SIMA	Union of Metal and Allied Industries
	Sindeq	Democratic Union of Energy, Chemical, Textile and Other Industries
RO	Confpeltex	Light Industry Workers Federation
SE	IF Metall	Union of Metalworkers
	IKEM	Innovation and Chemical Industries in Sweden
	SSMF	Swedish Cobblers Association
	TEKO	Sweden's Textile & Fashion Companies
	Unionen	Union of White-collar Workers
SI	GZS-ZTOUPI	Chamber of Commerce and Industry of Slovenia – Metals and Non-metals Association
	OPZ	Chamber of Craft and Small Business of Slovenia – Skin Processing Section
	ZSSS-STUPIS	Slovenian Trade Union of Textile and Leather Processing Industries
	TU Alpina Žiri	Trade Union Alpina Žiri
	TU Independence Alpina Žiri	Trade Union Independence KNSS Company Alpina Žiri
	TU Planika Turnišče	Trade Union Planika Turnišče
	ZDS	Association of Employers of Slovenia
SK	IOZ	Integrated Trade Union Association
	OZ KOVO	Metalworkers' Federation KOVO in the Slovak Republic

Table 46: Trade unions and employer organisations in Italy that are signatories to national collective agreements for the footwear sector

Trade unions	Employer organisations
CIU SUL ([1])	AIS ([1])
Confsal SIA	ALIM
FEMCA CISL ([2])	ANAP
Fesica Confsal	Casartigiani
Filctem CGIL ([2])	CIFA
FILD Confsal	CLAAI ([2])
FILP ([2])	CNA Federmoda ([2])
SLE	CNL
Uiltec UIL([2])	Confartigianato Moda ([2])
	Confimprenditori ([1])
	Conflavoro PMI
	Edafos
	Fedarcom
	Federcasa ([1])
	Formaimpresa ([1])
	PMI ITALIA
	Uniforma
	Unilavoro PMI
	Uniontessile Confapi ([2])
	Unipel ([2])
	ValItalia PMI

([1]) Cross-sectoral social partners that are signatories to a specific collective agreement for third-party processing in the textile and footwear sectors.

([2]) TCLF sector-specific social partners.

Source: Italy, National Council for Economics and Labour, national collective agreements database, updated November 2024.

Table 47: Distribution of companies in the sector by size and Member State, 2022

Member State	0–9	10–19	20–49	50–249	250+
AT	79	12	4	8	1
BE	16 ([a])	n.d.	n.d.	n.d.	0
BG	128	25	51 ([a])	33	n.d.
CZ	116	7	14	10	0
DE	280	19	23	29	11
DK	21 ([a])	1 ([a])	1 ([a])	0	0
EE	15	1	4	2	0
EL	368	26	8	4	0 ([a])
ES	2 058	380 ([a])	296	71	6 ([a])
FI	49	4	1	2	1
FR	311	18	24	10	0
HR	70	4	11	18	5
HU	157	13	25	20	3
IE	10	n.d.	n.d.	n.d.	0
IT	4 747	898	535	172	29
LT	42	0	1	2	0
LV	11	3	1	n.d.	n.d.
NL	130	2	2	4	0
PL	1 024 ([19])	96	66	28	6
PT	1 610	288	315	207	8
RO	715	77	120	100	17
SE	66	0	2	0	0
SI	58	1	4	3	1
SK	258	n.d.	19	n.d.	n.d.

([a]) Reference year is 2021

Note: n.d., no data.

Source: SBS data for 2022.

([19]) National data indicate the following: 0–9 employees, 2 482 companies; 10–49 employees, 210 companies; 20–49 employees, 46 companies; 50–249 employees, 46 companies; 250+ employees, 8 companies.

Table 48: Sector coverage of trade union by Member State

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
AT	PROGE	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Blue-collar workers, apprentices and retirees in the private sector in metalworking, mining, energy, textiles and leather, agriculture, food processing, tobacco, chemicals, glass production, paper, vulcanisation, mineral oil. gas, temporary agency work	industriAll Europe
	GPA	Yes	Yes		Yes		Yes	Yes (1)	White-collar workers in almost all sectors	n.d.

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
BE	ACLVB-CGSLB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Construction, energy, industrial sectors	industriAll Europe
	ACV-BIE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Almost all sectors	industriAll Europe, EFBH, UNI Europa
	ABVV-FGTB ACCG	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Mainly production and industrial sectors	industriAll Europe
BG	FOSIL	Yes	Yes			Not present			Textiles and clothing, glass and ceramics, electronics, household engineering	industriAll Europe
CZ	OS TOK	Yes						Yes ([1])	Textiles	industriAll Europe ([2])
DE	IG BCE	Yes	Yes	Yes	Yes			Yes	Mining, chemicals, pharmaceuticals, man-made fibres, energy, glass, rubber, ceramics,	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
									plastic processing, leather, petrol, paper, recycling and water	
DK	CO-industri	Yes	Yes	Yes	Yes	Yes	Not present	Yes (1)	Entire manufacturing sector	industriAll Europe
	3F	Yes	Yes	Yes	Yes	Yes	Not present	Yes (1)	Blue-collar workers in both the private and public sectors	industriAll Europe (3)
EE	ETTAF	Yes						Yes (1)	Light industry: manufacture of wearing apparel, manufacture of food products, manufacture of chemicals and chemical products	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
EL	OEKIDE	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Textiles, leather and tanning	No
ES	CCOO-Industria	Yes	Yes	Yes	Yes		Yes	Yes (1)	Textiles, leather and tanning and other industrial sectors	industriAll Europe
	UGT-FICA	Yes	Yes	Yes	Yes		Yes	Yes (1)	Agri-food sector, capital goods and ICT, construction and mining, energy and water, automotive, chemical, textiles, leather, graphic arts, iron and steel	industriAll Europe
FI	Teollisuusliitto	Yes	Yes	Yes	Yes		Yes	Yes	Textiles, leather and tanning, chemicals, technology,	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
									wood products	
	PRO	Yes	Yes		Yes			Yes	White-collar workers in industry, finance, services, ICT and communication, public sector, textiles, leather and tanning	industriAll Europe
	Tradenomit	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	Business administration in all industries and sectors	No
	YTN	Most likely	Most likely		Most likely				Senior salaried workers with an academic background in chemicals, ICT, energy, finance, technology	No

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
FR	CGT-THCB	Yes		Yes	Yes	Yes	Yes	Yes (1)	Textiles, leather, laundry	industriAll Europe
	FS-CFDT	Yes		Yes	Yes	Yes	Yes	Yes (1)	No	industriAll Europe
	FO Chimie	Yes		Yes	Yes	Yes	Yes	Yes (1)	Commerce, hospitality, services, etc.	industriAll Europe
	CFTC-CMTE	Yes		Yes	Yes	Yes	Yes	Yes (1)	Metal, energy, textiles	industriAll Europe
	CFE-CGC AGRO/SNCEA	Yes		Yes	Yes	Yes	Yes	Yes (1)	Agriculture, agri-food industry	industriAll Europe
HR	SIND TOKG	Yes	Yes		Yes	Yes	Yes	Yes (1)	Textiles, rubber, leather and tanning	No
HU	BDSZ	Yes	Yes					Yes (1)	Textiles, garments, leather, mining, energy	industriAll Europe
IT	Filctem CGIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Chemicals, energy,	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
									leather and tanning	
	FEMCA CISL	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Chemicals, energy, textiles	industriAll Europe
	Uiltec UIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Chemicals, fashion, energy, leather and tanning, textiles	industriAll Europe
	FILP-CISAL	n.d.		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No
NL	FNV	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	All sectors	industriAll Europe
	CNV	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	All sectors	industriAll Europe
PT	FESETE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Textiles, clothing, leather and tanning, related sectors	industriAll Europe
	Sindeq	Yes	Yes						Chemicals, energy,	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
									textiles, others	
	SIMA	Yes	Yes						Manufacturing of metal, electronics, chemicals, pharmaceuticals, paper, concrete and dairy products, graphic arts, transport, human health, others	industriAll Europe
RO	Confpeltex	Yes	Yes	Yes	Yes		Yes	Yes (1)	Leather and tanning	industriAll Europe
SE	Unionen	Yes	Yes	Yes	Yes	Yes	Yes	Yes	White-collar workers in all sectors	industriAll Europe
	IF Metall	Yes	Yes	Yes	Yes		Yes	Yes	Industry, mining, steel, manufacturing	industriAll Europe
SI	STUPIS	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Textiles, leather and tanning	industriAll Europe

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
	TU Independence Alpina Žiri	Yes	Yes		Yes	Yes	Yes	Yes (1)		No
	TU Alpina Žiri	Yes	Yes		Yes	Yes	Yes	Yes (1)		No
	TU Planika Turnišče	Yes	Yes		Yes		Yes	Yes (1)		No
SK	IOZ	Yes	Yes		Yes			Yes (1)	Transport, construction	industriAll Europe
	OZ KOVO	Yes	Yes					Yes (1)		industriAll Europe

(1) Manufacture of finished leather goods is not part of the footwear sector.

(2) industriAll Europe affiliate but not for the footwear sector.

(3) Via CO-industri.

Note: n.d., no data.

Source: Network of Eurofound Correspondents, 2023.

Table 49: Categories of workers covered by sectoral trade unions by Member State

Member State	Trade union name	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Educational level			Company size group (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	1–9	10–49	50–249	250+		
AT	PROGE	Yes					Yes	Yes	Yes	Yes	Yes	Yes	Yes	1	industriAll Europe
	GPA	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		2	n.d.
BE	ACLVB-CGSLB	Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1 or 2	industriAll Europe
	ACV-BIE	Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	3 (1)	industriAll Europe, EFBH, UNI Europa
	ABVV-FGTB ACCG	Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1 or 2	industriAll Europe
BG	FOSIL	Yes					Yes	Yes				Yes		1	industriAll Europe
CZ	OS TOK	Yes			Yes	Yes		Yes				Yes		1	industriAll Europe (2)
DE	IG BCE	Yes			Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	1	industriAll Europe
DK	CO-industri	Yes					Yes			Yes	Yes			Negotiation cartel	industriAll Europe

Member State	Trade union name	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Educational level			Company size group (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	1–9	10–49	50–249	250+		
	3F	Yes					Yes			Yes				1	industriAll Europe (3)
EE	ETTAF	Yes						Yes				Yes		1	industriAll Europe
EL	OEKIDE	Yes			Yes, up to production supervisors, not chief executives	Yes	Yes	Yes	Yes	Yes	Yes	Yes		1	No
ES	CCOO-Industria	Yes			Yes, up to middle-level management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Unclear which is the largest; both are equally important	industriAll Europe
ES	UGT-FICA	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Unclear which is the largest; both are equally important	industriAll Europe
FI	Teollisuusliitto	Yes	Yes				Yes	Yes		Yes	Yes	Yes	Yes	1	industriAll Europe
FI	PRO				Yes	Yes		Yes			Yes	Yes	Yes	2	industriAll Europe
FI	Tradenomit				Yes	Yes			Yes	n.d.	n.d.	n.d.	n.d.	Small one	No
FI	YTN				Yes	Yes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	Small one	No

Member State	Trade union name	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Educational level			Company size group (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	1–9	10–49	50–249	250+		
FR	CGT-THCB	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Small one	industriAll Europe
	FS-CFDT	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		2	industriAll Europe
	FO Chimie	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		3	industriAll Europe
	CFTC-CMTE	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1	industriAll Europe
	CFE-CGC AGRO/SNCEA				Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Small one	industriAll Europe
HR	SIND TOKG	Yes				Yes	Yes	Yes	Yes			Yes	Yes	1	No
HU	BDSZ	Yes				Yes	Yes	Yes	Yes			Yes	Yes	1	industriAll Europe
IT	Filctem CGIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1	industriAll Europe
	FEMCA CISL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 or 3	industriAll Europe
	Uiltec UIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2 or 3	industriAll Europe
	FILP-CISAL	Yes	Yes	Yes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No

Member State	Trade union name	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Educational level			Company size group (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	1–9	10–49	50–249	250+		
NL	FNV	Yes	Yes	Yes	Yes	Yes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	1	industriAll Europe
	CNV	Yes	Yes	Yes	Yes	Yes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	2	industriAll Europe
PT	FESETE	Yes	(4)		(4)	(4)	Yes	Yes	(4)	Yes	Yes	Yes	Yes	1	industriAll Europe
	Sindeq	Yes					Yes	Yes		Yes	Yes	Yes	Yes	2	industriAll Europe
	SIMA	Yes					Yes	Yes		Yes	Yes	Yes	Yes	Small one	industriAll Europe
RO	Confpeltex	Yes			Yes	Yes		Yes		Yes	Yes	Yes	Yes	1	industriAll Europe
SE	Unionen	Yes	Yes		Yes	Yes		Yes	(5)	Yes	Yes	(5)	(5)	2	industriAll Europe
	IF Metall	Yes			Yes		Yes	Yes		Yes	Yes	(5)	(5)	1	industriAll Europe
SI	STUPIS	Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1	industriAll Europe
	TU Independence Alpina Žiri	Yes				Yes	Yes	Yes					Yes	Small one	No

Member State	Trade union name	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Educational level			Company size group (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	1–9	10–49	50–249	250+		
	TU Alpina Žiri	Yes				Yes	Yes	Yes	Yes				Yes	Small one	No
	TU Planika Turnišče	Yes				Yes	Yes	Yes	Yes			Yes		2	No
SK	IOZ	Yes						Yes					Yes	1	industriAll Europe
	OZ KOVO	Yes						Yes						2	industriAll Europe

([1]) One of the smallest.

([2]) industriAll Europe affiliate but not for the footwear sector.

([3]) Via CO-industri.

([4]) The statutes of FESETE’s member unions allow the affiliation of all workers, but this category is unlikely to be covered.

([5]) The trade union theoretically organises all white-collar workers in all company sizes in the sector, but no workers with tertiary-level education and no large firms are present in the footwear sector.

Note: n.d., no data.

Source: Network of Eurofound Correspondents, 2023.

Table 50: Collective bargaining involvement of sectoral trade unions at the Member State level

Member State	Trade union abbreviation	MEB	SEB	Workforce coverage (%)	Parts not covered
AT	PROGE	Yes	No	55	No
	GPA	Yes	No	45	Yes
BE	ACLVB-CGSLB	Yes	Yes	96–100 (1)	No
	ACV-BIE	Yes	Yes	96–100 (1)	No
	ABVV-FGTB ACCG	Yes	Yes	96–100 (1)	No
BG (2)	FOSIL	No	No	n.a.	n.a.
CZ	OS TOK	Yes (3)	Yes (4)	83	Yes
DE	IG BCE	Yes	No	70	Yes
DK	CO-industri	Yes	Yes	n.d.	Yes
	3F	Yes (5)	Yes (5)	n.d.	Yes
EE (2)	ETTAF	No	No	n.a.	n.a.
EL (6)	OEKIDE	n.d.	n.d.	n.a.	No
ES	CCOO-Industria	Yes	Yes	100	Yes
	UGT-FICA	Yes	No	100	Yes
FI	Teollisuusliitto	Yes	No	92 (1)	No
	PRO	Yes	No	50–70	Yes
	Tradenomit	No	No	n.d.	n.d.
	YTN (7)	Yes	No	n.d.	n.a.
FR	CGT-THCB	Yes	Yes	100	Yes (8)
	FS-CFDT	Yes	Yes	100	Yes (8)
	FO Chimie	Yes	Yes	100	Yes (8)
	CFTC-CMTE	Yes	Yes	100	Yes
	CFE-CGC AGRO/SNCEA	Yes	Yes	100	Yes (8)
HR	SIND TOKG	No (9)	Yes	15	Yes
HU	BDSZ	No (9)	Yes	11	Yes
IT	Filctem CGIL	Yes	Yes	Almost 100	No
	FEMCA CISL	Yes	Yes	Almost 100	No

Member State	Trade union abbreviation	MEB	SEB	Workforce coverage (%)	Parts not covered
	Uiltec UIL	Yes	Yes	Almost 100	No
	FILP-CISAL	Yes	n.d.	< 1	No
NL (2)	FNV	No	No	n.a.	n.a.
	CNV	No	No	n.a.	n.a.
PT	FESETE	Yes	No	99	No
	Sindeq	Yes	No	1	No
	SIMA	Yes (10)	No	0.3 (11)	No
RO	Confpeltex	No	Yes	< 1	Yes
SE	Unionen	Yes	Yes	80–90	No
	IF Metall	Yes	No	80–90	No
SI	STUPIS	Yes	Yes	100	No
	TU Independence Alpina Žiri	No	No	n.a.	n.a.
	TU Alpina Žiri	No	Yes	40	Yes
	TU Planika Turnišče	No	Yes	20	Yes
SK (9)	IOZ	No	Yes	32.13	Yes
	OZ KOVO	No	Yes	2	Yes

(1) Data refer to both the footwear sector and the leather and tanning sector.

(2) No collective bargaining in the sector.

(3) Only indirectly, through a multi-sectoral collective agreement that is extended to the footwear sector via extension mechanisms.

(4) Only in one plant.

(5) Via CO-industri.

(6) No collective bargaining or collective agreements have taken place in the footwear sector since 2009.

(7) YTN is a negotiation organisation conducting collective bargaining with private sector employers on behalf of member unions of the umbrella organisation AKAVAs. YTN has other trade unions, not individuals, as members.

(8) Within the athletic and sports shoes subsector there are only two companies, and they are covered by a different collective agreement, according to the main employer organisation. The manufacture of finished leather goods and shoe repair activities do not belong to the footwear sector and are covered by other collective agreements.

(9) No collective bargaining at the sectoral level.

(10) Only by adhering to a multi-employer bargaining agreement negotiated by another union (FESETE).

(11) This percentage is an estimate of the coverage of SIMA's adherence agreement (which is a copy of FESETE's multi-employer bargaining agreement in the sector).

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

Source: Network of Eurofound Correspondents, 2023.

Table 51: Parts not covered by collective bargaining

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Shoe repair activities
AT	GPA			n.d.		X			n.d.
CZ	OS TOK		X	X	X	X	X	X	X
DE	IG BCE					X	X		X
DK	CO-industri						X	X	
	3F						X	X	
ES	CCOO-Industria					X			
	UGT-FICA					X			
FI	PRO			X		X	X	X	X
FR	CGT-THCB		X (*)					X (*)	X (*)
	FS-CFDT		X (*)					X (*)	X (*)
	FO Chimie		X (*)					X (*)	X (*)

Member State	Trade union name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Shoe repair activities
	CFTC-CMTE		X (*)	X				X (*)	X (*)
	CFE-CGC AGRO/SNCEA		X (*)					X (*)	X (*)
HR	SIND TOKG			X					X
HU	BDSZ			X	X	X	X	X	X
RO	Confpeltex					X		X	X
SI	TU Alpina Žiri		x	X		X			X
	TU Planika Turnišče			X		X			X
SK	IOZ			X		X	X	X	X
	OZ KOVO			X	X	X	X	X	X

(*) Within the athletic and sports shoes subsector there are only two companies, and they are covered by a different collective agreement, according to the main employer organisation. The manufacture of finished leather goods and shoe repair activities do not belong to the footwear sector and are covered by other collective agreements.
Note: n.d., no data.

Table 52: Sector coverage of sectoral employer organisations at the Member State level

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
AT	FV TBSL	Yes	Yes		Yes		Yes	Yes (1)	Yes (textiles and clothing, including leather and tanning)	Euratex and COTANCE (2)
	BIG	Yes		Yes		Yes	Yes		Yes (audiology, opticians, dental technicians)	No
BE	Ledercuir	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	n.d.
BG	BATOK	Yes	Yes		Yes		Yes	Yes	Yes (clothing)	No
CZ	ČOKA	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Yes (commerce)	CEC
	ATOK (3)	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Yes (textiles)	Euratex
DE	HDS/L	Yes	Yes	Yes	Yes	Yes	Yes		Yes (leather goods and luggage, leather- or plastic-processing industry)	FESI
DK	Skobranchen (4)	Yes	Yes		Yes			(1)	No	No
	Danmarks Skomagerlaug	Yes	Yes	Yes	Yes	Yes	Yes	(1)	No	No
	Københavns Skomagerlaug			Yes		Yes		(1)	No	No

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
EL	ELSEVIE	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	No	CEC
	OVYE	Yes	Yes	Yes	Yes	Yes	Yes	Yes (1)	Yes (shoe shops, footwear import–export)	No
ES	FICE	Yes	Yes	Yes	Yes	Yes		(1)	No	CEC
	AEC						Yes	Yes (1)	Yes (components such as metal accessories, shanks, frames, welts, zippers, linings)	No
FI	AFLSI	Yes			Yes		Yes	Yes	Yes (leather and tanning)	CEC
FR	FFC	Yes			Yes	Yes	Yes	Yes (1)	No	CEC
	FFPO			Yes				(1)	No	No
HR	HUP UTKI	Yes	Yes		Yes			(1)	Yes (textiles, leather and tanning)	CEC, Euratex, SMEUnited, BusinessEurope
HU	MKSZ	Yes	Yes		Yes		Yes	(1)	Yes (leather and tanning, textiles and garments)	CEC
	BCE	Yes	Yes		Yes			(1)	Yes (leather and tanning)	No

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
	OCSZ			Yes				([1])	No	No
	EOCE			Yes				([1])	No	No
IT	Assocalzaturifici	Yes	Yes	Yes	Yes	Yes	No	No	No	CEC
	CNA Federmoda	Yes	Yes	Yes	Yes		Yes	Yes ([1])	Yes (textiles and clothing)	ACTE, SMEUnited
	Uniontessile Confapi	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Yes (textiles)	n.d.
	Casartigiani	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Yes (handicrafts in all sectors)	n.d.
	CLAAI	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Yes (handicrafts in all sectors)	n.d.
	Confartigianato Moda	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Yes (textiles, clothing, tailors and designers, eyewear, cleaners)	n.d.
LT	LATIA	Yes						([5])	Yes (textiles and apparel, education, commerce, consulting)	Euratex
PL	PIPS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (leather and tanning, leather goods, components, research and development centres)	CEC

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
	PGPO	Yes	Yes			Yes			Yes (leather and tanning, trade and e-commerce)	No
	OIBS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (leather and tanning, wholesaling of hides, skins and raw materials, chemical products, glove and mitten manufacturing, notions and needlework product manufacturing, leather product wholesaling, merchandise wholesaling, management consulting services)	No
	Pracodawcy RP	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	No
PT	APICCAPS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	CEC
SE	SSMF	Yes	Yes	Yes	Yes	Yes	Yes		No	No
	TEKO	Yes					Yes	Yes	Yes (textiles)	No
	IKEM	Yes		Yes	Yes	Yes	Yes	Yes	Yes (chemicals, pharmaceuticals, refineries, rubber and plastic)	No

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Ortho-paedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Other sectors covered	European affiliation
SI	ZDS	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Yes (textiles, clothing and leather processing, commerce, agriculture, energy, construction, catering, paper and wood, chemicals, metals, services, traffic, communication)	No
	GZS-ZTOUPI	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	Yes (textiles, leather and tanning, paper, metal- and non-metal-processing industry)	No
	OPZ	Yes	Yes	Yes	Yes	Yes	Yes	Yes ([1])	No	No

([1]) Manufacture of finished leather goods is not part of the footwear sector.

([2]) Probably not for the footwear sector.

([3]) Via ČOKA. ATOK is oriented mostly towards the textile industry, and it is a signatory of a collective bargaining agreement in the textile sector that was extended to cover the footwear sector.

([4]) The employer organisation probably does not have members within the footwear production sector because it is very small in Denmark. The indication of the parts of the sector covered refers mainly to retail shops.

([5]) There is no such manufacturing in Lithuania, other than some artisans and individual craftspeople who produce single pieces.

Note: n.d., no data.

Source: Network of Eurofound Correspondents, 2023.

Table 53: Categories of companies covered by sectoral employer organisations

Member State	Employer organisation name	Self-employed shoemakers	Micro-companies (1–9)	Small companies (10–49)	Medium-sized companies (50–249)	Large companies (250+)	Ranking in the sector	
							Large	Microcompanies and small and medium-sized enterprises
AT	FV TBSL		Yes	Yes	Yes	Yes	1	1 or 2
	BIG	Yes	Yes				2	1 or 2
BE	Ledercuir			Yes			n.a.	1
BG	BATOK				Yes		n.a.	1
CZ	ČOKA		Yes	Yes	Yes		n.a. (1)	n.a. (1)
	ATOK (2)		Yes	Yes	Yes		n.a.	n.a.
DE	HDS/L		Yes	Yes	Yes	Yes	1	1
DK	Skobranchen	Yes	Yes				1	1
	Danmarks Skomagerlaug	Yes	Yes				n.a.	Not among the largest
	Københavns Skomagerlaug	Yes		Yes			n.a.	Not among the largest
EL	ELSEVIE		Yes	Yes	Yes		1	n.d.

Member State	Employer organisation name	Self-employed shoemakers	Micro-companies (1–9)	Small companies (10–49)	Medium-sized companies (50–249)	Large companies (250+)	Ranking in the sector	
							Large	Microcompanies and small and medium-sized enterprises
	OVYE	Yes	Yes				n.a.	1
ES	FICE	Yes	Yes	Yes	Yes	Yes	1	2
	AEC		Yes	Yes	Yes	Yes	2	1
FI	AFLSI		Yes	Yes	Yes	Yes	1	1
FR	FFC		Yes	Yes	Yes	Yes	1	1
	FFPO		Yes	Yes	Yes		2	2
HR	HUP UTKI				Yes	Yes	n.a. (1)	n.a. (1)
HU	MKSZ				Yes	Yes	1	1
	BCE				Yes	Yes	2 (3)	2 (3)
	OCSZ	Yes	Yes	Yes	Yes		n.a.	1 (4)
	EOCE	Yes	Yes	Yes			n.a.	2 (4)
IT	Assocalzaturifici	Yes	Yes	Yes	Yes	Yes	1	n.d.
	CNA Federmoda	Yes	Yes	Yes	Yes	Yes	2	1

Member State	Employer organisation name	Self-employed shoemakers	Micro-companies (1–9)	Small companies (10–49)	Medium-sized companies (50–249)	Large companies (250+)	Ranking in the sector	
							Large	Microcompanies and small and medium-sized enterprises
	Uniontessile Confapi	Yes	Yes	Yes			Not among the largest	Not among the largest
	Casartigiani	Yes	Yes	Yes			n.d.	n.d.
	CLAAI	Yes	Yes	Yes			n.d.	n.d.
	Confartigianato Moda	Yes	Yes	Yes	Yes		n.d.	n.d.
LT	LATIA				Yes		1	n.a.
PL	PIPS	Yes	Yes	Yes	Yes	Yes	1 ([5])	n.d.
	PGPO		Yes	Yes	Yes		n.d.	n.d.
	OIBS		Yes	Yes	Yes		n.d.	n.d.
	Pracodawcy RP					Yes	n.d.	n.d.
PT	APICCAPS	Yes	Yes	Yes	Yes	Yes	1	1
SE	SSMF	Yes					n.a.	Not among the largest
	TEKO			Yes	Yes		1	2
	IKEM			Yes	Yes		n.a.	1

Member State	Employer organisation name	Self-employed shoemakers	Micro-companies (1–9)	Small companies (10–49)	Medium-sized companies (50–249)	Large companies (250+)	Ranking in the sector	
							Large	Microcompanies and small and medium-sized enterprises
SI	ZDS		Yes	Yes	Yes	Yes	2	2
	GZS-ZTOUPI		Yes	Yes	Yes	Yes	1	2
	OPZ	Yes	Yes	Yes			n.a.	1

([1]) It is the only business association / employer organisation in the sector.

([2]) Via ČOKA.

([3]) Second largest but not representative.

([4]) In the orthopaedic footwear production sector, NACE 32.50.

([5]) Estimate.

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

Source: Network of Eurofound Correspondents, 2023.

Table 54: Collective bargaining involvement of sectoral employer organisations

Member State	Employer organisation abbreviation	MEB	SEB	Parts not covered
AT	FV TBSL	Yes	No	Yes
	BIG	Yes	No	Yes
BE	Ledercuir	Yes	No	No
BG (1)	BATOK	No	No	n.a.
CZ	ČOKA	No	No	n.a.
	ATOK	Yes	No	Yes (2)
DE	HDS/L	Yes	Yes	No
DK	Skobranchen	No	No	n.a.
	Danmarks Skomagerlaug	No	No	n.a.
	Københavns Skomagerlaug	No	No	n.a.
EL (1)	ELSEVIE	n.d.	n.d.	Yes (2)
	OVYE	n.d.	n.d.	No
ES	FICE	Yes	No	Yes
	AEC	Yes	Yes	Yes
FI	AFLSI	Yes	No	No
FR	FFC	Yes	No	Yes (3)
	FFPO	Yes	No	Yes (3)
HR	HUP UTKI	No (4)	No (5)	n.a.
HU (4)	MKSZ	No	No	n.a.
	BCE	No	No	n.a.
	OCSZ	No	No	n.a.
	EOCE	No	No	n.a.
IT	Assocalzaturifici	Yes	No	No
	CNA Federmoda	Yes	Yes	No
	Uniontessile Confapi	Yes	n.d.	No

Member State	Employer organisation abbreviation	MEB	SEB	Parts not covered
	Casartigiani	Yes	n.d.	No
	CLAAI	Yes	n.d.	No
	Confartigianato Moda	Yes	n.d.	No
LT	LATIA	No	No	n.a.
PL (4) (6)	PIPS	No	No	n.a.
	PGPO	No	No	n.a.
	OIBS	No	No	n.a.
	Pracodawcy RP	No	No	n.a.
PT	APICCAPS	Yes	No	No
SE	SSMF	No	No	n.a.
	TEKO	Yes	No	No
	IKEM	Yes	No	Yes
SI	ZDS	Yes	No	No
	GZS-ZTOUPI	Yes	No	No
	OPZ	No	No	n.a.

(1) No collective bargaining in the sector.

(2) Shoe repair activities, which is part of the footwear sector.

(3) Within the athletic and sports shoes subsector there are only two companies, and they are covered by a different collective agreement, according to the main employer organisation. The manufacture of finished leather goods and shoe repair activities do not belong to the footwear sector and are covered by other collective agreements.

(4) No collective bargaining at the sectoral level.

(5) Not directly (it supports companies in collective bargaining).

(6) In Poland no collective bargaining at the sectoral level is available in any sector. Collective bargaining takes place only at the company or multi-company level.

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

Source: Network of Eurofound Correspondents, 2023.

Table 55: Parts not covered by collective bargaining

Member State	Employer organisation name	Classic and leisure shoes	Athletic and sports shoes (including outdoor)	Orthopaedic shoes	Safety shoes (including professional footwear)	Bespoke and artisanal shoes	Shoe components	Manufacture of finished leather goods	Shoe repair activities
AT	FV TBSL			X		X			X
	BIG		X (n.a.)		X (n.a.)				
CZ	ATOK								X
EL	ELSEVIE								X
ES	FICE					X		X (1)	
	AEC					X		X (1)	
FR	FFC		X (2)					X (2)	X (2)
	FFPO		X (2)					X (2)	X (2)
SE	IKEM		X						X

(1) The manufacture of finished leather goods is not part of the footwear sector.

(2) Within the athletic and sports shoes sector there are only two companies, and they are covered by a different collective agreement, according to the main employer organisation. The manufacture of finished leather goods and shoe repair activities do not belong to the footwear sector and are covered by other collective agreements.
Note: n.a. not applicable.

Table 56: Correspondents who contributed to this study

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This study provides information allowing for an assessment of the representativeness of the organisations involved in the European sectoral social dialogue committee for the footwear sector. Their relative representativeness legitimises their right to be consulted and their capacity to negotiate agreements. The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the sector. This study identifies industriAll Europe, representing trade unions, and the European Footwear Confederation, representing employers, as the most representative European-level social partner organisations in the footwear sector.

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