

Industrial relations

# Representativeness of the European social partner organisations: Commerce sector





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## Country codes EU28

<b>AT</b>	Austria	<b>FI</b>	Finland	<b>NL</b>	Netherlands
<b>BE</b>	Belgium	<b>FR</b>	France	<b>PL</b>	Poland
<b>BG</b>	Bulgaria	<b>HR</b>	Croatia	<b>PT</b>	Portugal
<b>CY</b>	Cyprus	<b>HU</b>	Hungary	<b>RO</b>	Romania
<b>CZ</b>	Czech Republic	<b>IE</b>	Ireland	<b>SE</b>	Sweden
<b>DE</b>	Germany	<b>IT</b>	Italy	<b>SI</b>	Slovenia
<b>DK</b>	Denmark	<b>LT</b>	Lithuania	<b>SK</b>	Slovakia
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<b>EL</b>	Greece	<b>LV</b>	Latvia		
<b>ES</b>	Spain	<b>MT</b>	Malta		

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## Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners (that is, the trade unions and employer organisations) in the commerce sector, and to show how they relate to the sector's European-level organisations representing employees and employers. The report is divided into three parts: an overview of the economic specificities and the employment trends in the commerce sector; an analysis of the social partner organisations in all 28 EU Member States; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

In this section, the objectives of the study are presented along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee for the commerce sector, which was established in its current form in 1998, following the reorganisation of European social dialogue.

### Objectives of the study

Representativeness studies are conducted for three reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is a criterion to be eligible for the setting up of a European sectoral social dialogue committee, or the participation in one of them.
- Representativeness also means having the capacity to negotiate agreements that can lead to an implementation by Council decision as provided by Article 155 of the TFEU.

Representativeness is defined by European Commission Decision 98/500/EC on the establishment of sectoral social dialogue committees promoting dialogue between social partners at European level (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative EU-level social partner organisation.

- The organisation must relate to specific sectors or categories and be organised at European level.
- The organisation should include organisations that are themselves an integral and recognised part of Member States' social partner structures, have the capacity to negotiate agreements, and are representative of several Member States.
- The organisation should have adequate structures to ensure its effective participation in the work of the sectoral social dialogue committees.

To accomplish its aims, the study first identifies the relevant national social partner organisations in the commerce sector before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study only includes organisations whose membership domain is classed as 'sector related'. In terms of territorial coverage, the study includes the EU28.

### European sectoral social dialogue committee for the commerce sector

The European sectoral social dialogue committee for the commerce sector was established in 1998 by Euro-FIET (now UNI Europa<sup>1</sup>) and EuroCommerce, following the reorganisation of European social dialogue in line with the Commission Decision 98/500/EC of 20 May 1998. Prior to this, there had already been an active social dialogue between EuroCommerce and Euro-FIET since 1983, which was officially recognised by the European Commission in 1990. In 1993, EuroCommerce and Euro-FIET officially recognised each other as social partners.

The social partners in the sector are active in formulating joint texts and activities, some of which pre-date the official establishment of the European sectoral social dialogue committee. Since the official start of the European sectoral social dialogue committee for commerce in 1998, 27 joint texts have been agreed by

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<sup>1</sup> As indicated in Chapter 3 of this report, UNI Europa is active in a variety of sectors. The section responsible for the commerce sector is often referred to as UNI Europa Commerce (and as UNI Commerce at the global level). For the purposes of simplicity, in this report, the European-level organisation representing trade unions in the European sectoral social dialogue committee is referred to as UNI Europa.



EuroCommerce and UNI Europa. These have included – among other things – texts relating to employment and training in the sector, combating discrimination on the basis of race and age, health and safety including third party violence, telework, the impact of sector policy and trends, migration and mobility, and undeclared work. In 2008, the social partners adopted a joint reaction on the impact of the economic crisis on the commerce sector. More recently, the social partners adopted a joint agreement on telework and ICT-mobile work (2018), voluntary guidelines supporting age diversity in commerce (2016) and recommendations and an action plan on social dialogue in the EU13 and candidate countries (2014), among others (see Table 37).

## Definitions and methodology

The methodology applied is linked to the criteria identified in European Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity.

Each of these criteria will be defined in this section, starting with sector-relatedness and the demarcation of the commerce sector. In agreement with the social partners and the Commission, the commerce sector is defined by NACE<sup>2</sup> codes 45, 46 and 47 (see below).

**Table 1: Demarcation of the commerce sector with NACE codes 45, 46 and 47**

<b>45</b>	<b>Wholesale and retail trade and repair of motor vehicles and motorcycles</b>
45.10	Sale of motor vehicles
45.20	Maintenance and repair of motor vehicles
45.30	Sale of motor vehicle parts and accessories
45.40	Sale, maintenance and repair of motorcycles and related parts and accessories
<b>46</b>	<b>Wholesale trade</b>
46.10	Wholesale on a fee or contract basis
46.20	Wholesale of agricultural raw materials and live animals
46.30	Wholesale of food, beverages and tobacco
46.40	Wholesale of household goods
46.50	Wholesale of information and communication equipment
46.60	Wholesale of other machinery, equipment and supplies
46.70	Other specialised wholesale
46.90	Non-specialised wholesale trade
<b>47</b>	<b>Retail trade</b>
47.10	Retail sale in non-specialised stores
47.20	Retail sale of food, beverages and tobacco in specialised stores
47.30	Retail sale of automotive fuel in specialised stores
47.40	Retail sale of information and communication equipment in specialised stores
47.50	Retail sale of other household equipment in specialised stores
47.60	Retail Sale of cultural recreation goods in specialised stores
47.70	Retail sale of other goods in specialised stores
47.80	Retail sale via stalls and markets
47.90	Retail trade not in stores, stalls or markets (e-commerce)

Source: NACE (Rev.2)

<sup>2</sup> NACE nomenclature, i.e. European ‘statistical classification of economic activities’ in the European Community (NACE) (Rev.2). For the demarcation of a specific sector, reference is made to a number of NACE codes.

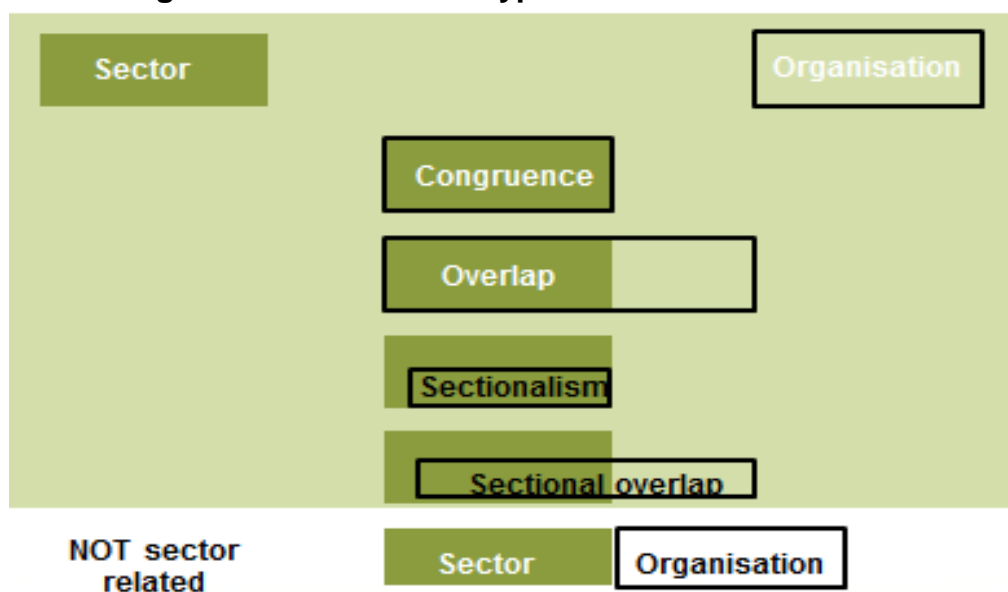
The membership domains of trade unions and employer organisations (Table 2) can fall within this demarcation of the sector, which is a type of sector-relatedness called ‘congruence’. If the membership domain of an organisation goes beyond the commerce sector as described here, this is known as an ‘overlapping’ organisation. ‘Sectional’ is where an organisation’s domain covers a part of the commerce sector (and no other sectors), whereas ‘sectional overlap’ is where an organisation’s domain covers part of the commerce sector and also has membership in other sectors.

**Table 2: Domain patterns of the members of an organisation**

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

The figure below presents the four different types of sector-relatedness visually.

**Figure 1: Four different types of sector-relatedness**



**Membership** is another important aspect of representativeness and this study looks at two levels. Firstly, the geographical coverage of the EU-level organisations (for instance, how many Member States the EU-level trade union/employer organisation has affiliates in) and, secondly, the organisational density of the national affiliates. The study also considers whether EU-level players include most or at least the most significant national-level players (in relation to their membership strength in the sector and their involvement in collective bargaining), or whether there are major gaps in their membership domain.

Membership of a social partner organisation requires the payment of membership fees on a regular basis; however, some organisations are reluctant to inform third parties about such payments. Taking into account the limits of transparency, this study does not distinguish between different membership statuses beyond highlighting the three different types of membership that exist in EuroCommerce (national associations,

affiliated members and companies – see Chapter 3 and Tables 50 and 51 in Annex 1). Where possible, indirect membership is also taken into account.

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. For this assessment of the ‘capacity to negotiate’, the **actors**, their objectives and the decision-making structures provided in their statutes are considered, as well as the **outcome** (in terms of texts agreed), and the **processes** through which the organisations obtained a mandate, support and approval from their member organisations during the negotiation process.

The **involvement of their members in national-level collective bargaining** is important as it shows that the affiliates are able to obtain a mandate to negotiate on behalf of their members (at least at the national level, which could then also translate to a mandate to negotiate at EU level). Where such a mandate for European negotiations is in place either implicitly or explicitly, this allows for negotiations to take place at European level, which could potentially result in binding agreements or the drafting of European autonomous agreements which require implementation by social partners at the national level, in line with their respective practices and traditions. The capacity to act autonomously in this way results in being able to contribute to the effectiveness of the European sector social dialogue committee.

Finally, representativeness also depends upon the structures and resources of organisations, as well as their capacity to encourage the active participation of their members, to combine the different interests of member organisations and enhance their ability to act autonomously at European level.

**Effective participation in the European sectoral social dialogue committee** is assessed in terms of presence at committee meetings within the two years prior to the publication of this report. Involving internal structures within the European organisations when preparing for European sectoral social dialogue committee meetings and discussing social affairs linked to EU-level dialogue can increase efficiency and ensure that more organisation members feel represented than just those that directly participate in the meetings.<sup>3</sup>

## Data collection

The representativeness study combines top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of the European associations EuroCommerce and UNI Europa, while the bottom-up approach looks for other organisations involved in commerce sector-related collective bargaining in the Member States and their membership of European level organisations.

Unless cited otherwise, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates are provided rather than leaving a question blank.

Thus, quantitative data may stem from three sources:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the respective organisations; (e.g. to calculating the density rates)
- estimates, expert opinions and assessments made by the Network of Eurofound Correspondents or representatives of the respective organisations

Other sources included reports from Ecommerce Europe, information available from the BARCOM project, the social dialogue texts database, as well as data from Eurostat (Structural Business Statistics (SBS) and the EU Labour Force Survey (LFS)).

## Quality control measures

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

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<sup>3</sup> More information on definitions of key terms can be found in Eurofound’s Industrial Relations Dictionary: <https://www.eurofound.europa.eu/observatories/eurwork/industrial-relations-dictionary>

Firstly, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents between May 2017 and July 2018. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the Network of Eurofound Correspondents to revise them in the second half of 2017.

An overview of the national contributions was made available to the European social partners to allow their affiliates to double check information and add comments. In addition, in April 2018 the national members of the Eurofound Governing Board were invited to check the consistency of the information in this report, to ensure that the bottom-up approach included all the relevant sector-related organisations. As different social partner organisations could see the reported information of other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information of other organisations representing similar membership, this process included an element of mutual control and recognition.

Draft versions of the overview report were shared with EuroCommerce, UNI Europa and the European Commission in June 2018 for feedback and comments. Taking into account all feedback, the final report was evaluated on 14 September 2018 and approved in Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the Commission in the presence of the European-level sectoral social partners identified in the report.

## **Structure of the report**

The report consists of three main chapters:

1. a brief summary of economic background and specificities of the commerce sector
2. an analysis of the relevant social partner organisations in the EU28
3. a consideration of the representative associations at European level

It is important to note the difference between research and the political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not decide whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in the European social dialogue. However, with the information and analyses provided in this report, actors and decision makers can draw further statements, proclamations or decisions, and develop an action plan for capacity building if necessary.

## 1. Economic background and employment trends

### Business and employment structure of the sector and the growth of e-commerce

The commerce sector in the European Union, as defined within the NACE classification system (Rev. 2, Codes 45, 46 and 47), employed close to 33 million individuals in around 6.2 million enterprises in 2015 (Eurostat SBS<sup>4</sup>). In many countries, in terms of employments figures, the commerce sector comes second only to the manufacturing sector. The largest sub-sector in terms of number of enterprises and employees is retail trade (with around 3.6 million enterprises and 18.8 million persons employed in 2015 in the EU28), followed by wholesale trade (around 1.8 million enterprises and 10.4 million employees in 2015 in the EU28). It is a sector that has undergone significant change over the last decades, with key trends including internationalisation, an element of concentration, deregulation (including the liberalisation of shop opening hours) and technological innovation. The sector has also been affected by demographic change, which has influenced consumption patterns. A particular trend in this sector associated with technological change has been the rise of e-commerce and its associated knock-on effect on the 'traditional' retail sector, as well on other associated services such as logistics (warehousing and delivery). According to Eurostat data, between 2010 and 2017, the share of enterprises' turnover from e-commerce increased from 14% to 18% in the EU28.<sup>5</sup>

With the exception of the large, often multinational companies, a feature of the commerce sector (particularly but not exclusively in relation to food retail) is that its market place is fairly national and often regional and local, as people tend to do most of their shopping near their homes. However, the linked supply chain for the goods purchased is often international. The single market is therefore mainly relevant for some large retailers and the wholesale element of the market (including the motor vehicle element). For smaller retailers wishing to enter a larger market place, this opportunity has been opened up by trends in e-commerce. A recent report on e-commerce in Europe showed that while cross-border e-commerce sales remain a relatively small part of the market, in some countries, this is significant. Sales from the US and China tend to pre-dominate, however, purchases from countries such as the United Kingdom (UK) and Germany are noteworthy in some countries. For instance, in the Nordic countries, 25% of individuals interviewed for a survey declared that they had shopped from the UK. For Germany and France, the share purchasing goods from the UK was 14% and 17% respectively. German retailers made up a significant share of visits for online shopping being carried out in Italy (15%), the Nordic countries (15%), France (14%) and the Netherlands (14%).

Overall, clothing and footwear, home electronics, books, cosmetics and CDs are the items that are most commonly purchased online.

In the **e-commerce** sector, the US based company Amazon is one of the most dominant forces in the exclusively (at least in Europe) online marketplace. In terms of e-commerce sales in Europe, it is followed by another exclusively online retailer, Zalando, with more 'traditional' retailers such as John Lewis (in third place), Next, Metro and Sainsbury's also represented in the top 15 (Ecommerce Europe, 2017). At this stage, it is worth noting that 3 of the companies in the top 15 retailers active in e-commerce are direct members of EuroCommerce (Royal Ahold,<sup>6</sup> Metro and Amazon).

According to Eurostat data, the number of enterprises selling their goods online has been increasing constantly from 13% in 2010 to 18% in 2016. However, this leaves around 80% of the market segment – in many cases small and medium-sized enterprises (SMEs) – lagging behind in relation to this significant growth element and opportunity for the sector. A recent report by the European Commission (2018) proposes a number of actions to support businesses to benefit from the opportunities offered by e-commerce. As shown in Figure 2, e-commerce turnover continues to increase. However, growth in this market segment has

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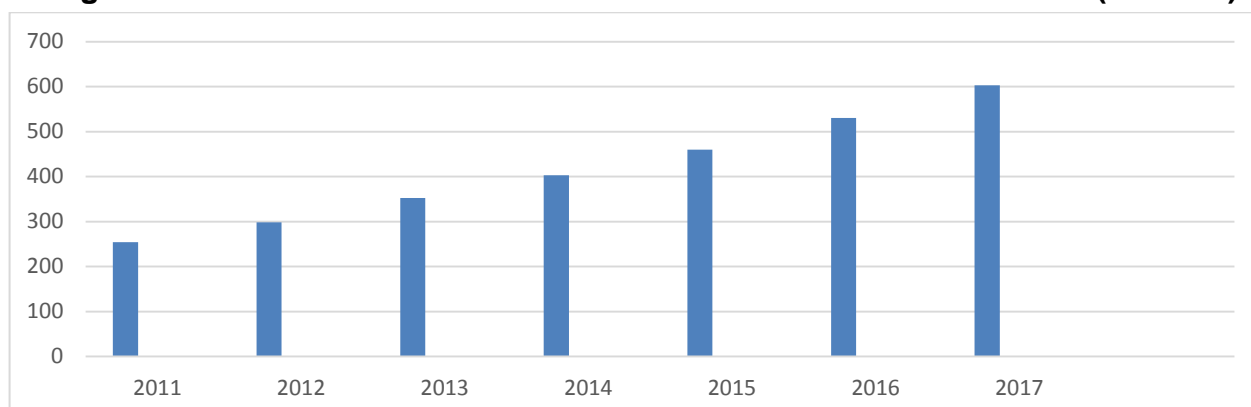
<sup>4</sup> Data from 2015 represents the most recent SBS data that is publicly available. SBS data was used in this study in preference over EU-LFS data, as publicly available SBS data provides information both about the number of enterprises and employees, as well as giving access to a breakdown of such data for NACE 45, 46 and 47.

<sup>5</sup> The level of increase was particularly significant in Belgium, the Czech Republic, Denmark, Slovakia and Slovenia.

<sup>6</sup> Generally known as Ahold Delhaize.

been declining (from 21.3% in 2010 to 13.6% in 2017; see Figure 3). Despite this, the trend towards online selling is set to remain a key feature of the commerce sector in Europe.

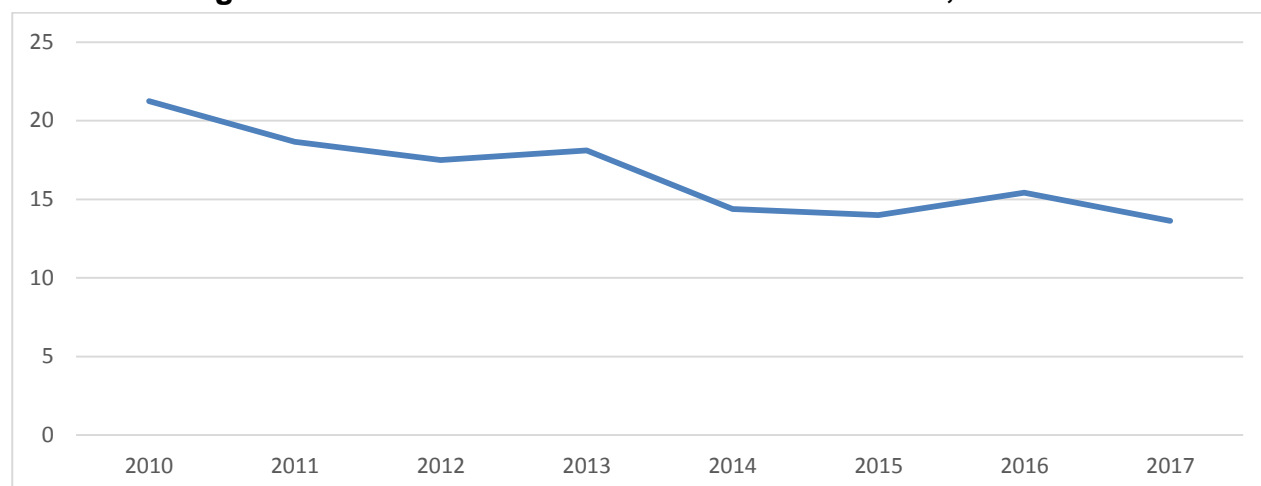
**Figure 2: Turnover in business to consumer e-commerce 2010–2017 (billion €)**



*Note: Figure for 2017 is an estimate.*

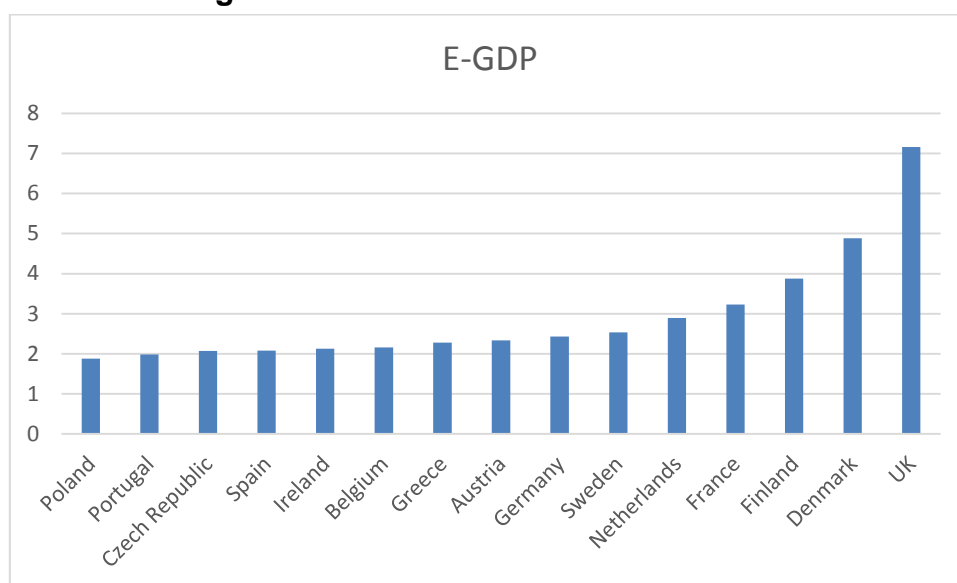
*Source: Ecommerce Foundation, European Ecommerce Report 2017.*

**Figure 3: Growth trends in the e-commerce sector, 2010–2017**



*Source: Ecommerce Foundation, European Ecommerce Report 2017.*

Currently, in term of sales, the UK is by far the largest market for e-commerce, followed by Germany and France. As a share of GDP, e-commerce sales make up the largest share in the UK with around 7%, followed by Denmark at 4.8% and Finland at 3.9% (see Figure 4). With a number of notable exceptions (Amazon, Zalando etc.), most of the large e-commerce retailers are also brick and mortar companies with a traditional, physical presence. While the balance of ‘bricks versus clicks’ is set to change in future, most market analysts continue to support a multi-channel strategy.

**Figure 4: E-GDP in EU countries in 2016**

Source: Ecommerce Foundation, European Ecommerce Report 2017.

In the UK, 87% of shoppers had purchased goods online in the last 12 months, followed by Denmark with 84% and Germany with 82%. The lowest figure for online sales in the EU was found in Romania, with only 18% of shoppers having made purchases online over the same period (Ecommerce Europe, 2017). Disaggregated employment data for the e-commerce sector is available in very few countries, potentially due to the difficulty of disaggregating employment data dedicated to e-commerce among retailers with both a physical and online offering, and the overlap between the e-commerce and logistics (distribution/warehousing) sectors. Where disaggregated data is available, the share of employment in this market segment remains very small as a share of overall sector employment (see Table 3); however, it is growing.

**Table 3: Data on e-commerce employment**

Country	Trend in e-commerce employment	Share of total commerce employment
AT	4,200	0.64%
CY	2008: 50 2015: 176	2015: 0.23%
LT	2008: 2,885 2014: 3,939	2014: 2.43%
RO	2011: 4,658 2015: 9,867	2015: 1.11%
SE	2014: approx. 7,000	1.07%

Source: Network of Eurofound Correspondents' national contributions to this study (2017–

### Employment trends in the sector

Between 2008 and 2010, the commerce sector was heavily affected by the financial and economic crises, with most countries witnessing a decline in the number of enterprises and employees over the peak crisis years. In the UK, for example, it is estimated that around 4,000 retail companies went out of business during the years of the crisis. As demonstrated by the European Restructuring Monitor, a number of countries witnessed some high-profile bankruptcies and restructuring during the crisis years and the period that followed. These include: V&D in the Netherlands (8,000 job losses); Dayli (which itself was a follow-up to

the Schlecker group of companies which went into administration some years earlier) in Austria with the loss of 3,600 jobs; Anttila (1,300 job losses due to bankruptcy) and Stockmann (1,000 redundancies due to restructuring) in Finland which both received support from the European Globalisation Fund; and, Freshmarket in Lithuania (667 job losses).

However, since then, the sector has recovered relatively well in most countries, with positive trend developments since 2012. Between 2012 and 2015, although the number of enterprises in the sector declined slightly, the number of employees increased (see Table 7). This trend continued until 2017, according to EU-LFS data. The sub-sector most affected by reductions in the number of enterprises and employees was the wholesale trade sector, resulting partly from greater concentration. Between 2012 and 2015, the retail sector and the sector of wholesale, retail and repair of motor vehicles and motorcycles witnessed increases in the number of enterprises and people employed. The latter is particularly notable since the vehicle retail sector suffered a significant degree of volatility during the crisis, but has recovered well in a number of key markets. In the retail segment, the crisis years had a more significant impact on the non-food sector rather than the food sub-sector, as households cut back on non-essential items.

Table 4 shows the number of employees employed under NACE codes 45, 46 and 47 between 2010 and 2015, and the proportion of the total commerce sector workforce that this represents. Data for each EU member states can be found in table 41 in Annex 1, and for each NACE code heading separately, data is in tables 42, 43 and 44 in Annex 1.

**Table 4: EU commerce employment by NACE code and share of NACE code of total commerce sector employment (2015)**

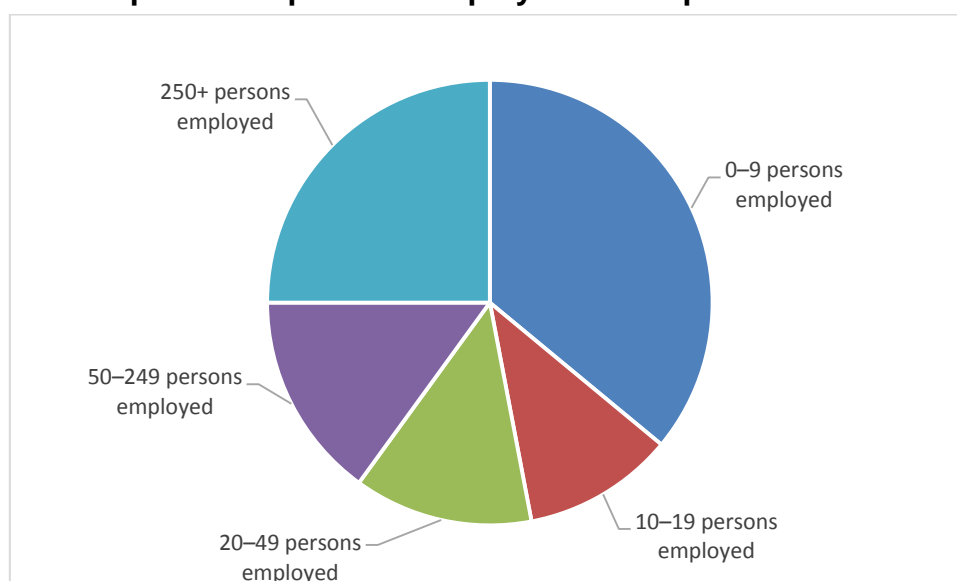
	<b>NACE 45 – Vehicles wholesale, retail and repair</b>		<b>NACE 46 – Wholesale trade</b>		<b>NACE 47 – Retail trade</b>	
<b>Year</b>	<b>Number of people employed</b>	<b>Proportion of commerce sector workforce</b>	<b>Number of people employed</b>	<b>Proportion of commerce sector workforce</b>	<b>Number of people employed</b>	<b>Proportion of commerce sector workforce</b>
2010	3.8 million	11.7%	10.4 million	31.9%	18.6 million	56.4%
2011	3.7 million	11.6%	10.5 million	32%	18.7 million	56.4%
2013	3.7 million	11.4%	10.3 million	32%	18.4 million	56.6%
2015	3.8 million	11.5%	10.4 million	31.5%	18.8 million	57%

*Source: Own calculations based on SBS; see also Tables 41–43 in Annex 1.*

In terms of market penetration and employment, another increasingly important feature of the EU retail environment is internationalisation, with a number of large food and non-food retail chains increasingly expanding operations beyond their ‘home markets’, for instance, Aldi, Auchan, Carrefour and Lidl<sup>7</sup>. Table 45 in Annex 1 provides an overview of the five largest companies in each of the Member States; a number of these companies are represented as being among the largest employers beyond the country where their headquarters are located. During the crisis, the food retail sector in particular witnessed an increasing proliferation of low cost providers such as Aldi and Lidl, which have tended to see their market share grow. This growth has been sustained since the end of the crisis period.

<sup>7</sup> See Table 45 in the Annex for an overview of the five largest companies in the different Member States, where a number of these companies are represented as being among the largest employers beyond the country where their headquarters are based.



**Figure 5: Proportion of persons employed in companies of different sizes**

Source: SBS, accessed March 2018.

An interesting feature of the commerce sector is the relative polarisation of businesses in terms of size. As demonstrated by Figure 5, 36% of people in this sector work in companies with 0–9 employees and 25% of individuals work in companies with over 250 employees. A further 15% of the commerce sector workforce work in companies with 50–249 employees, with 11% and 13% working in companies with 10–19 and 20–49 workers respectively. This means that the majority of individuals active in the sector (60%) work in companies with under 50 employees. Data on the number of businesses in the commerce sector by size segment are not available from Eurostat. However, data available on the number of self-employed in the sector indicate that a significant share of businesses in the sector are very small businesses,<sup>8</sup> with a degree of polarisation between very large and very small companies.

It is therefore not surprising that in many countries, the largest five employers concentrate an important share of employment in the sector (see Table 5 below). While in countries such as Germany, Luxembourg, the Netherlands and Slovenia, collective bargaining coverage is largely achieved through multi-sector collective agreements, in the remaining countries represented in the table below, the larger employers are more likely to be unionised (or have representation through a works council) and therefore more likely to be covered by collective agreements.

**Table 5: Countries where the share of employment in the commerce sector's five largest companies is over 10%**

Country	Share of commerce sector employment of the five largest companies
IE	29%
SI	18%
UK	17%
DE	15%
EE	14%
LT	14%

<sup>8</sup> 4.8 million individuals in the sector are self-employed. There are around 6.3 million businesses in the commerce sector. However, not all self-employed in the sector are owner–operators. Nonetheless, this provides an indication of the share of very small businesses in the sector.

LU	14%
NL	13%
SK	13%
HR	12%
CZ	12%

*Source: Calculated based on the Network of Eurofound Correspondents' national contributions to this study (2017–2018). The data for all Member States is available in Table 45 in Annex 1.*

The following table shows the employment characteristics of the commerce sector in the EU28 countries, specifically, the average number of employees per company. The table shows that at the EU level, the average number of employees in commerce sector enterprises is around 5. This ranges from close to 14 in the UK to under 3 in the Czech Republic, Greece, Italy, Portugal and Slovakia. Denmark and Germany also have a larger than average business size in the sector. The presence of large retail chains (Aldi, Metro, Tesco, etc.) impact the average number of employees in some countries (e.g. in Germany and the UK) more than in others (e.g. in France or Spain where Carrefour and El Corte Inglés also make up a large share of employment).

**Table 6: Employment characteristics in the commerce sector in the EU28, 2015**

Country	Number of companies	Total employment	Average employment per company
EU28	6,205,080	32,992,629	5.3
AT	77,930	655,210	8.4
BE	136,451	631,928	4.6
BG	137,970	496,087	3.6
CY	16,070	62,154	3.9
CZ	241,572	708,843	2.9
DE	602,128	6,409,246	10.6
DK	41,095	420,839	10.2
EE	16,088	91,345	5.6
EL	253,167	639,710	2.5
ES	725,880	2,955,041	4.1
FI	43,695	293,549	6.7
FR	717,265	3,318,441	4.6
HR	135,111	564,332	4.2
HU	37,340	226,889	6.1
IE	46,626	345,911	7.4
IT	1,105,227	3,302,288	3.0
LT	28,580	161,823	5.7
LU	61,054	254,750	4.2
LV	7,699	50,126	6.5
MT	8,845	32,404	3.7
NL	246,561	1,473,526	6.0

Country	Number of companies	Total employment	Average employment per company
PL	499,700	2,245,115	4.5
PT	222,034	735,834	3.3
RO	171,961	882,621	5.1
SE	127,894	656,236	5.1
SI	26,180	112,662	4.3
SK	109,720	332,899	3.0
UK	361,237	4,932,820	13.7

Source: Eurostat SBS, accessed March 2018

Among the 150 employer organisations identified, 46% include the largest employer in the country among their members. Just over 27% of these organisations do not include the country's largest employer. This information is not available for the remaining organisations. In addition, there are currently 31 large multinational employers holding direct membership of EuroCommerce (see Table 51 in Annex 1).

As indicated above, the commerce sector has witnessed an overall increase in employment since 2012, while the number of enterprises has declined. This section uses data from Eurostat (SBS<sup>9</sup>).

As demonstrated in Table 7 below, according to Eurostat the number of enterprises in the sector increased in 11 Member States (Austria, Estonia, France, Germany, Latvia, Lithuania, Luxembourg, the Netherlands, Romania, Slovenia and the UK) and declined in the remaining 17 Member States. The increase was above 10% in Estonia, Lithuania and the Netherlands. During the same period, employment in the commerce sector increased in 14 Member States (Austria, Denmark, Estonia, Germany, Hungary, Ireland, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Sweden and the UK), rising by over 5% in Estonia, Ireland, Latvia, Lithuania and Malta. Employment declined in the remaining 13 Member States, with the most significant reductions in Greece (19.3%) – no doubt an impact of the prolonged economic crisis and austerity policies in the country – followed by Italy (3.8%) and Croatia (3.1%). Overall, the number of larger enterprises (more than 250 employees) has been increasing, whereas the number of SMEs has tended to decline across the EU.

It is noteworthy that, at the same time, turnover in the sector increased in 22 Member States, and in 5 countries (Bulgaria, Ireland, Lithuania, Malta and Romania), it did so by double digits. This could be indicative of a degree of concentration in the sector with turnover concentrated in a smaller number of companies, which in a number of cases created additional employment.

<sup>9</sup> SBS data has been preferred to data provided by the Network of Eurofound Correspondents to ensure comparability. As mentioned in Footnote 2, SBS data is also preferred to EU-LFS, despite being somewhat more outdated, as it provides greater granularity of information.

**Table 7: Trends in number of companies, turnover and employment, 2009–2015  
(difference in %)**

Country	EU 28	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
% change in number of companies	-0.6	4.3	- 8	-0.5	-3.9	-2.7	4.2	-6.5	13.4	-2.7	-1.4	-5.1	1	-6.4	-1.5
% change in turnover	2.5	-2.5	4.7	10.2	-7.8	-0.7	4	7.2	6	-15	9	-13.4	0.1	2.4	6.7
% change in employment	0.4	2.3	-3	-1.5	-2.7	-0.3	3.8	0.8	6.6	-19	-0.4	-1	-2	-3.1	2
Country	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	UK	
% change in number of companies	-2	-5	11.9	4	8.3	-4.5	21.4	-2.6	-4.5	1.3	-0.8	3.6	-6.2	1	
% change in turnover	19.9	2.5	13.4	-11	6.3	26.2	-3.7	8.5	5.5	10.6	1.7	3.7	2	1.1	
% change in employment	5.6	-3.8	7.1	5	5.8	12.3	0.3	2.3	-1.6	-2	1.4	-1.6	-2.7	4.1	

Source: Eurostat, SBS, accessed March 2018

Table 8 shows the countries with the largest number of employees in the commerce sector. Given the nature of the business, this is very much influenced by population size (and therefore number of consumers), thus reflecting the largest Member States, i.e. France, Germany, Italy, Poland, Spain and the UK. Among these countries, the sector is of greatest significance in terms of its share of total employment in the Netherlands. This data is available for all Member States in Tables 41 and for each of the three main parts of the commerce sector separately in tables 42, 43 and 44 in Annex 1.

Overall, the data regarding the share of employment and employees in the commerce sector as part of overall employment/employees demonstrates the significance of the sector in terms employment in the Member States. The proportion of the national workforce in Member States working in the commerce sector varies, from almost 20% to just over 10%. Its contribution to employment is particularly significant in Luxembourg (19.6%), Lithuania (19.6%), Latvia (18.6%), Greece (18%) and Cyprus (17.8%) (see Table 9). Romania (10.7%), Finland (12.4%), Slovenia (12.5%) and France (12.7%) have the lowest share of commerce sector employment as a share of total employment in the economy.

**Table 8: Member States with commerce sector employment higher than 1,000,000 in 2015**

Country	Total employment	Total sectoral employment as % of total employment in economy	Number of employees	Proportion of employees as % of total number of employees
DE	6,409,246	16.4%	5,853,744	16.6%
UK	4,932,820	16.4%	4,768,163	18.5%
FR	3,318,441	12.7%	2,984,266	12.9%
IT	3,302,288	15%	1,962,189	11.6%
ES	2,955,041	16.7%	2,334,542	15.9%
PL	2,245,115	14.2%	1,669,116	13.3%
NL	1,473,526	18.2%	1,301,131	19%

Source: SBS, accessed May 2018

**Table 9: Member States where the commerce sector made a significant contribution to overall employment in 2015**

Country	Total employment	Total sectoral employment as % of total employment in economy	Number of employees	Proportion of employees as % of total number of employees
CY	62,154	17.8%	59,074	19.6%
EL	639,710	18%	401,590	17.2%
MT	32,404	17.8%	24,728	15.7%
LT	254,750	19.6%	225,663	19.7%
LU	50,126	19.6%	48,375	21%
LV	161,823	18.6%	153,663	20.2%

Source: SBS, accessed May 2018

Another feature of employment in the commerce sector is that it is female dominated in most countries. Women make up between 50% and 60% of the workforce in 14 of the 21 countries where this data is available. The countries where men continue to dominate the commerce sector (representing between 50% and 60% of the workforce) are Belgium, Denmark, Greece, Ireland, Italy, the Netherlands and the UK. In 16 of the countries where data is available, there has been an increase in female employment in the sector between 2012 and 2016. Furthermore (and alongside the increase in female employment), there has been a reported increase in the use of part-time contracts. Much of this is reported to be marginal part-time employment (for instance in Austria, Denmark and Germany) and an increase in atypical employment – for instance, zero-hour contracts – is reported in Ireland and the UK. Limited data is available on the share of

temporary work in the sector. Overall, the share of this form of employment is considered to have increased but remains relatively low in this sector.

Where employment data is available by age group (in 13 of the 28 Member States), it shows that in countries where there have been job losses in recent years, young people have tended to be the most affected. The share of young people (aged 18–24) working in the sector is around 10%, with some significant exceptions in Denmark (30%) and the Netherlands (35%). The vast majority of employees in this sector are ‘prime age’ workers (aged 25–54), with older workers on average making up between 10% and 15% of employees. A significant exception in this area is Estonia, where 27% of workers in the commerce sector are aged 55 or over.

The enterprise and employment structure of the commerce sector has a number of implications for industrial relations. The commerce sector is somewhat unusual in the sense that the number of employer organisations exceeds the number of trade unions representing workers in the sector (see Chapter 2). This is primarily due to the fact that, in a number of countries (for instance, France and Italy), there are different employer organisations representing retailers selling different types of products. Furthermore, in many countries there are specific organisations representing smaller retailers and/or cooperative retailers. Different organisations also exist representing retailers (and wholesalers) in the motor vehicle segment. Among the trade unions, there are also some distinctions between those representing workers in the motor vehicle (mainly repair) segment and other retail sector unions; largely because the former focus on mechanics and engineers, whereas the latter represent service sector workers.

Larger retailers tend to be organised in employer organisations and can wield significant influence in these organisations. Smaller retailers thus sometimes prefer to be organised in employer organisations focusing on SMEs. However, a significant number of small retailers are not members of any employer organisation. As is seen in other sectors, larger retailers are more likely to be unionised, although this is not the case in all countries.

The significance of the sector in terms of employment means that collective agreements, wages, and terms and agreements prevalent in this sector have an important impact on purchasing power in the domestic economy and could have some signalling effect for other sectors. Overall, the significance of company-level agreements has tended to increase; however, the importance over multi-employer versus single-employer collective bargaining continues to follow established industrial relations and collective bargaining trends established in different Member States.

The nature of the enterprise structure, with a preponderance of larger and very large companies on the one hand and micro- and small businesses on the other, can pose a challenge for trade unions and for the identification of representative employer organisations (where SMEs are represented by specific organisations). Furthermore, the existence of company-level collective agreements in the largest companies (see Table 45 in Annex 1), where they exist, will cover a significant share of workers and could have a signalling effect for other enterprises in the sector.

The segment of the sector that is purely dedicated to e-commerce (rather than mixing traditional physical retail with e-commerce) is relatively young and issues could arise around organising staff in these sectors. Employment practices at large online retailers such as Amazon could have a spill over effect to other companies in this market segment and could affect working practices and the skills mix required in a range of Member States. The skills required by workers in online retail differ from those required in traditional customer facing retail roles, meaning that workers in such occupations could either be covered by different trade unions (and collective agreements) and/or could be more challenging to organise. In this segment, the emphasis is on a mix between IT and logistics skills, whereas in the brick and mortar segment on retail, direct customer facing and customer service tasks continue to predominate.

Increasing internationalisation is potentially bringing new industrial relations practices to Member States, which can lead to specific challenges, including in relation to trade union recognition and thus collective bargaining structures. Globalisation in the sector is linked to increasingly complex supply chains, a degree of concentration in the sector (with larger multinational retailers acquiring businesses domestically or in other Member States) and the establishment of large retail chains in Member States outside the country where their headquarters are based. The issue of supply chain management brings with it issues of production standards, including working conditions in other countries, primarily, but not exclusively, outside of the EU.

The rise in the low-cost segment (particularly in food retail) could also have specific implications for business models, which could ultimately affect industrial relations structures and wage trends.

To conclude, with close to 33 million employees in around 6.2 million companies, the commerce sector is a significant contributor to employment in the EU, being second in many countries only to the manufacturing sector. Having suffered significant losses during the great recession, the sector has recovered relatively well in recent years. Nonetheless, it continues to undergo significant change, not least with the rise of e-commerce with its associated knock-on effect on the 'traditional' retail sector. Industrial relations in the commerce sector are characterised by fragmentation, particularly (but not exclusively) among employer organisations. Some of this is due to the distinct nature of the general wholesale and retail sector compared to the sector dealing with wholesale, retail and repair of motor vehicles. The dichotomy between very large companies and small and micro-businesses is another factor. The next section goes on to discuss the nature of interest representation in the sector and its impact on collective bargaining in more detail.

## 2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the commerce sector.

The Network of Eurofound Correspondents identified 113 sector-related trade unions and 150 sector-related employer organisations in the EU28 (see Table 10).

**Table 10: Number of sector-related organisations per country, 2017**

Number of sector-related organisations	Member States with respective number of trade unions in the commerce sector overall	Member States with respective number of employer organisations in the commerce sector overall
1	CZ, HR, LV, RO, SK	LT, MT, UK
2	BG, EE, HU, IE, MT, PL, PT	BG, CY, HR, LV, RO
3	EL, LT, LU, SI, UK	CZ, DE, EE, EL, IE, PL, SK
4	AT, DE	LU, SI
5	DK	DK, FI, HU
6	CY, IT, NL, SE	AT
8	FI	BE, PT, SE
9	BE, ES	
11		IT, NL
15		ES
16	FR	
26		FR

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

In all 28 Member States, there is at least one trade union and at least one employer organisation active in the sector. France and Spain have the highest number of trade union and employer organisations active in the sector. On the trade union side, workers in the sector are represented by a single trade union in Croatia, the Czech Republic, Latvia, Romania and Slovakia. The same is true on the employer side in Lithuania, Malta and the UK.

### **Sector coverage, sector-relatedness and organisational density of trade unions**

Out of the 113 trade unions active in the commerce sector, 21 only cover workers in the activities in the NACE 45 sector, whereas 17 only represent workers in NACE 47. The remainder organise workers in all or several of the NACE codes encompassing the commerce sector. Table 11 present a more detailed breakdown of trade union representation by NACE code in the commerce sector.



**Table 11: Sector coverage of the 113 commerce sector trade unions**

Country	Name	NACE 45	NACE 46	NACE 47
AT	GPA-djp	Yes	Yes	Yes
	PRO-GE	Yes	No	No
	VAAÖ	No	No	Yes
	vida	Yes	Yes	Yes
BE	ABVV/FGTB Horval	No	Yes	Yes
	(ABVV-FGTB) MWB	Yes	No	No
	ABVV-Metaal	Yes	No	No
	ACLVB-CGSLB	Yes	Yes	Yes
	ACV-CSC METEA	Yes	No	No
	BBTK-SETCa	No	Yes	Yes
	CNE	Yes	Yes	Yes
	CSC-Alimentation et Services/ACV-Voeding en Diensten	Yes	Yes	Yes
	LBC-NVK	Yes	Yes	Yes
BG	ITUFECCCTS	Yes	Yes	Yes
	NFSCSCT Podkrepa Services Union	No	Yes	Yes
CY	OBIEK-SEK	Yes	No	No
	OMEPEGE-SEK	No	Yes	Yes
	OIYK-SEK	No	Yes	Yes
	SEBETTYK-PEO	No	Yes	Yes
	SEGDAMELIN-PEO	No	Yes	Yes
	SEMMHK-PEO	Yes	No	No
CZ	OSPO	No	Yes	Yes
DE	CGM	Yes	No	No
	DHV	Yes	Yes	Yes
	IG Metall	Yes	No	No
	ver.di	Yes	Yes	Yes
DK	Dansk Metal	Yes	No	No
	Fagligt Fælles Forbund (3F)	Yes	Yes	Yes
	HK	Yes	Yes	Yes
	Malerforbundet	Yes	No	No
	NNF	No	Yes	Yes
EE	ESTAL	Yes	Yes	Yes
	ETKA	Yes	Yes	Yes

Country	Name			
		NACE 45	NACE 46	NACE 47
EL	OIYE	Yes	Yes	Yes
	Trade Union of Estee Lauder Employees	No	No	Yes
	Trade Union of Lidl Employees	No	No	Yes
ES	CCOO-Industria	Yes	No	No
	CCOO-Servicios	No	Yes	Yes
	CIG Servizio	No	No	Yes
	ELA-Zerbitzuak	No	No	Yes
	FASGA	No	No	Yes
	FeSMC-UGT	Yes	Yes	Yes
	FETICO	No	No	Yes
	FICA-UGT	Yes	Yes	Yes
	USO	Yes	Yes	Yes
FI	ILRY	Yes	Yes	Yes
	PAM	No	Yes	Yes
	PRO	Yes	No	No
	SOA/ERTO	No	Yes	Yes
	SFL	No	Yes	Yes
	TEAM	Yes	No	No
	Teollisuusliitto	Yes	No	No
	YTN	Yes	Yes	Yes
FR	CFE-CGC Agroalimentaire	No	Yes	Yes
	CFE-CGC Métallurgie	Yes	No	No
	CFTC-CSFV	No	Yes	Yes
	CFTC Métallurgie	Yes	No	No
	CFDT-Cadres	Yes	Yes	Yes
	CFDT-Services	No	Yes	Yes
	CGT Commerce	No	Yes	Yes
	FEC-FO	No	Yes	Yes
	FGA-CFDT	No	Yes	Yes
	FGMM-CFDT	Yes	No	Yes
	FGTA-FO	No	Yes	Yes
	FNAF-CGT	No	Yes	Yes
	FNECS CFE-CGC	No	Yes	Yes
	FO Métaux	Yes	No	Yes
	FTM-CGT	Yes	No	Yes
	UNSA	No	Yes	Yes

Country	Name			
		NACE 45	NACE 46	NACE 47
HR	STH	Yes	Yes	Yes
HU	KASZ	No	Yes	Yes
	KDFSZ	No	No	Yes
IE	Mandate	Yes	Yes	Yes
	SIPTU	Yes	Yes	Yes
IT	FILCAMS-CGIL	Yes	Yes	Yes
	FIM-CISL	Yes	No	No
	FIOM-CGIL	Yes	No	No
	FISASCAT-CISL	Yes	Yes	Yes
	UILM	Yes	No	No
	UILTuCS-UIL	Yes	Yes	Yes
LT	LKKDPS	No	No	Yes
	LPSDPS	No	No	Yes
	SAMPRO	No	No	Yes
LU	Garages LCGB-ASG	Yes	No	No
	LCGB commerce, food processing and catering	No	Yes	Yes
	OGBL	Yes	Yes	Yes
LV	LTDA	Yes	Yes	No
MT	GWU	Yes	Yes	Yes
	UHM Voice of the Workers	Yes	Yes	Yes
NL	CNV Vakmensen	Yes	Yes	Yes
	FNV	Yes	Yes	Yes
	LBV	Yes	Yes	Yes
	VCP (formerly 'De Unie MHP')	Yes	Yes	Yes
	VHP	No	No	Yes
	W.I.M.	No	No	Yes
PL	FZZPSPHiU <sup>10</sup>	No	No	Yes
	NSZZ Solidarność	Yes	Yes	Yes
PT	CESP	Yes	Yes	Yes
	SITESE	Yes	Yes	Yes
RO	FSC	Yes	Yes	Yes
SE	AHT	Yes	Yes	Yes
	Handels	Yes	Yes	Yes

<sup>10</sup> FZZPSPHiU is a member of OPZZ, which has a number of other trade unions representing workers in the commerce sector among its membership (largely dedicated to individual employers). These unions are not mentioned separately in this report.

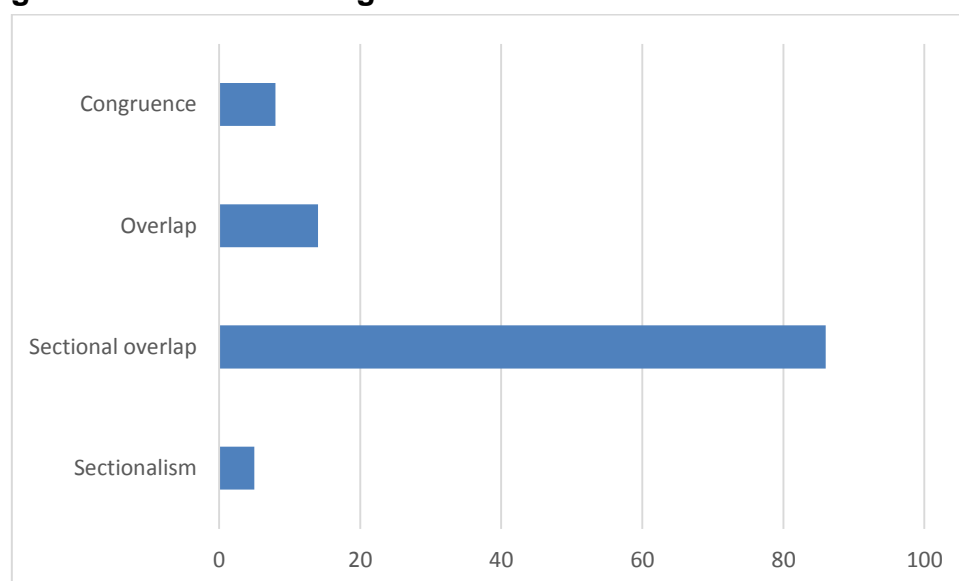
Country	Name	NACE 45	NACE 46	NACE 47
	IF Metall	Yes	No	No
	Lederana	Yes	Yes	Yes
	Sveriges Farmaceuter	No	No	Yes
	Unionen	Yes	Yes	Yes
SI	SDTS	Yes	Yes	Yes
	SGS	Yes	Yes	Yes
	STS-KS 90	Yes	Yes	Yes
SK	OZPOCR	Yes	Yes	Yes
UK	GMB	No	No	Yes
	Unite	Yes	No	Yes
	USDAW	Yes	Yes	Yes

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

Trade unions are assessed on how they relate to the sector by classifying them according to the four patterns of sector-relatedness (see Table 12).

Very few trade unions demarcate their domain in a way that is perfectly congruent with the commerce sector as defined for this study. Only eight trade unions (in Luxembourg, Poland, Slovenia and Spain) show a congruent domain (of these, five cover all NACE codes in the commerce sector). Five trade unions (from Austria, Greece and the Netherlands) cover only parts of their sector. In Austria, this is due to occupational specificity (for instance, one trade union only organises pharmacists), whereas in Greece and the Netherlands these are trade union which only organise workers in one commerce sector company. There are 15 trade unions that cover the whole of the commerce sector, as well as some workers outside the sector (these can be found in Germany, Estonia, France, Italy, Malta, the Netherlands, Portugal and the UK). The remaining 89 trade unions cover workers in the commerce sector, as well as workers outside the sector. Of these, 26 cover the entire commerce sector (all NACE codes) but not all types of workers (e.g. only blue collar or white collar etc.) and 63 cover several (but not all commerce related) NACE codes.

Figure 6 shows the domain coverage of trade unions in the commerce sector. The most common domain pattern is sectional overlap, occurring in 79% of trade unions (89 out of 113); 12% of trade unions fall under the overlap domain, covering the entire sector as well as workers outside the sector. For 4% of trade unions there is a congruent pattern, while the remainder are classified by sectionalism.

**Figure 6: Domain coverage of trade unions in the commerce sector****Table 12: Membership domain patterns of sector-related trade unions in the commerce sector, 2017–2018**

Country	Congruence	Sectionalism	Overlap	Sectional overlap
AT		VAAÖ		<b>GPA-djp, PRO-GE, vida</b>
BE				ABVV/FGTB Horval, ABVV-Metaal, (ABVV-FGTB) MWB, <b>ACLVB/CGSLB</b> , ACV-CSC, <b>ACV-CSC</b> Metea, <b>BBTK/SETCa, CNE, LBC/NVK</b>
BG				ITUFECCCTCS, NFSCSCT Podkrepa Services Union
CY				<b>OBIEK-SEK, OIYK-SEK</b> , OMEPEGE-SEK, SEBETTYK-PEO, SEGDA MELIN-PEO, SEMMHK-PEO
CZ				<b>OSPO</b>
DE			<b>ver.di</b>	CGM, DHV, IG Metall
DK				Dansk Metal, <b>HK</b> , Malerforbundet, <b>NNF, 3F</b>
EE			<b>ESTAL, ETKA</b>	
EL		Trade Union of Estee Lauder Employers, Trade Union of Lidl Employees		<b>OIYE</b>
ES	FASGA, FETICO			CCOO-Industria, <b>CCOO-Servicios</b> , CIG Servizio, <b>ELA-Zerbitzuak, FeSMC-UGT, FICA-UGT, USO</b>

Country	Congruence	Sectionalism	Overlap	Sectional overlap
FI				<b>ILRY, PAM, PRO, SFL, SOA/ERTO, TEAM, Teollisuusliitto, YTN</b>
FR				CFE-CGC Agroalimentaire, CFE-CGC Métallurgie, <b>CFDT-Cadres, CFDT-Services, CFTC-CSFV, CFTC Métallurgie, CGT Commerce, FEC-FO, FGA-CFDT, FGMM-CFDT, FGTA-FO, FNAF-CGT, FNECS CFE-CGC, FO Métaux, FTM-CGT, UNSA</b>
HR				<b>STH</b>
HU				<b>KASZ, KDFSZ</b>
IE				<b>Mandate, SIPTU</b>
IT			<b>FILCAMS-CGIL, FISASCAT-CISL, UILTuCS-UIL</b>	FIM-CISL, FIOM-CGIL, UILM
LT				<b>LKKDPS, LPSDPS, SAMPRO</b>
LU	Garages LCGB- ASG, <b>OGBL</b>			<b>LCGB commerce, food processing and catering</b>
LV				<b>LTDA</b>
MT			UHM Voice of the Workers	<b>GWU</b>
NL		VHP, W.I.M.	<b>CNV Vakmensen, LBV, NNV, VCP</b> (formerly 'De Unie MHP')*	
PL	<b>NSZZ Solidarność</b>			FZZPSPHiU
PT			<b>CESP, SITESE</b>	
RO	<b>FSC</b>			
SE				<b>AHT, Farmaceuter, Handels, IF Metall, Lederana, Sveriges Unionen</b>
SI	SDTS, STS-KS 90			SGS
SK				<b>OZPOCR</b>
UK			<b>USDAW</b>	<b>GMB, Unite</b>

Note: Members of UNI Europa are marked in bold

\*'De Unie MHP' in the Netherlands is now called VCP (Vakcentrale voor Professionals)

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

In what follows, the membership strength (organisational density) of trade unions in the commerce sector is assessed. The table below presents this information for trade unions for which this is available (this data is missing for 52 out of 113 organisations). The incompleteness of the available data means that it is difficult to compare the relative membership strength of each individual trade union. The next section therefore considers the relevance of each trade union in the sector depending on its involvement in sector-related collective bargaining. Overall, it can be said that with a few exceptions, the organisational density of trade unions in the commerce sector is rather low. However, it should be noted that for some countries, the data for the largest unions in the sector is missing (for instance in Denmark and Sweden) and the table below is therefore likely to underestimate the organisational density of commerce sector trade unions.

**Table 13: Organisational density**

Country	Total sector employees	Trade union members in the sector (how many unions covered by data)	Density
AT	571,298	2,620 (1 out of 4)	0.5%
BE	486,816	31,636 (2 out of 9)	6.5%
BG	377,147	850 (all)	0.2%
CY	60,043	1,707 (all)	1.8%
CZ	449,400	n/d	n/d
DE	5,571,105	n/d	n/d
DK	405,526	17,004 (all)	4.2%
EE	74,700	1,606 (all)	2.1%
EL	386,784	37,237 (all)	9.5%
ES	2,207,750	106,800 (5 out of 9)	4.8%
FI	240,048	106,572 (all)	44.4%
FR	3,030,069	46,186 (3 out of 17)	1.5%
HR	208,889	11,000 (all)	5.3%
HU	468,562	15,000 (1 out of 2)	3.2%
IE	345,911	49,750 (all)	14.4%
IT	1,941,454	231,577 (2 out of 6)	12%
LT	199,700	1,000 (2 out of 3)	0.5%
LU	49,449	21,000 (all)	42%
LV	153,663	1,734 (all)	1.2%
MT	24,164	3,864 (1 out of 2)	16%
NL	1,107,000	82,370 (5 out of 6)	7.4%
PL	1,925,000	15,000 (1 out of 2)	0.8%
PT	478,256	n/d	n/d
RO	1,045,590	13,000 (all)	1.2%
SE	523,024	133,830 (5 out of 7)	25.6% *
SI	99,382	32,450 (all)	33%
SK	256,400	10,000 (all)	3.9%
UK	4,854,000	364,003 (1 out of 3)	7.5%

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

Note: \*According to Statistics Sweden, trade union density in the commerce sector is 61%

### Trade union involvement in collective bargaining or social dialogue

While the previous section analysed the sector-relatedness and membership strength of trade unions, this section looks at their involvement in collective bargaining. The table below indicates whether trade unions are involved in multi- or single-employer collective bargaining (single-employer bargaining covers only the workforce in this employer whereas multi-employer bargaining generally covers all member organisations of the employer organisations which are party to an agreement), the share and the number of workers covered by such agreements. This table is based on estimates which have either been provided by the Network of Eurofound Correspondents' national experts, or have been inferred from general information about the level of collective bargaining coverage (particularly where such coverage is near universal) and systems for the extension of collective agreements (see for example Eurofound, 2015 and CESifo Group Munich, 2016).

**Table 14: Collective bargaining involvement of the 113 commerce sector trade unions**

Country	Name	Multi-employer bargaining	Single-employer bargaining	Level of coverage	Number of workers covered
AT	<b>GPA-djp</b>	X	X	100%	440,000
	PRO-GE	X			15,000
	VAAÖ	X			4,228
	<b>vida</b>	X			122,000
BE	ABVV/FGTB Horval	X	X	100%	
	(ABVV-FGTB) MWB	X	X		
	ABVV-Metaal	X	X		
	<b>ACLVB/CGSLB</b>	X	X		21,000
	ACV-CSC METEA	X	X		
	<b>ACV-Voeding en Diensten, CSC-Alimentation et Services</b>	X	X		35,143
	<b>BBTK/SETCa</b>	X	X		
	<b>CNE</b>	X	X		379,219
	<b>LBC/NVK</b>	X	X		379,219
BG	ITUFECCCTS		X	7%	
	NFSCSCT Podkrepa Services Union		X	7%	
CY	<b>OBIK-SEK</b>	n/d	n/d	5.4%	830
	OIYK-SEK		X		1,400



Country	Name	Multi-employer bargaining	Single-employer bargaining	Level of coverage	Number of workers covered
	OMEPEGE-SEK	X	X		150
	SEGDAMELIN-PEO	X	X		600
	SEMMHK-PEO	X	X		810
CZ	OSPO	X	X	16%	50,000
DE	CGM	X			
	DHV	X	X		
	IG Metall	X	X	41% (45, 46)	30% of workers
	ver.di	X	X	43% (47)	More than 90% of workers
DK	Dansk Metal	X			13,000
	HK	X	X		150,000
	Malerforbundet	X			1,270
	NNF	X			4,000
	3F	X	X		2,000
EE	ESTAL		X		416
	ETKA		X		2,506
EL	OIYE	X			
	Trade Union of Estee Lauder Employees		X		660
	Trade Union of Lidl Employees		X		2,500
ES	CCOO-Industria	X	X		58,000
	CCOO-Servicios	X	X		1,700,000
	CIG Servizio	X	X		
	ELA-Zerbitzuak	X	X		35,000
	FASGA	X	X		300,000
	FeSMC-UGT	X	X	88%	
	FETICO	X	X		
	FICA-UGT	X	X		
	USO	X	X		70,000
FI	ILRY	X	X		
	PAM	X		65%	185,000
	PRO	X			5,000
	SFL	X			4,496
	SOA/ERTO	X			1,100
	TEAM	X			1,200

Country	Name	Multi-employer bargaining	Single-employer bargaining	Level of coverage	Number of workers covered
	Teollisuusliitto	X			26,000
	YTN	X	X		
FR	CFE-CGC Agroalimentaire	X	X	96%	399,500
	CFE-CGC Métallurgie	X	X		
	CFDT-Cadres	No bargaining	No bargaining		399,500
	CFDT-Services	X	X		
	CFTC-CSFV	X	X		399,500
	CFTC Métallurgie	X	X		
	CGT Commerce	X	X		
	FEC-FO	X	X		
	FGA-CFDT	X	X		
	FGMM-CFDT	X	X		
	FGTA-FO	X	X		
	FNAF-CGT	X	X		
	FNECS CFE-CGC	X	X		1,478,000
	FO Métaux	X	X		
	FTM-CGT	X	X		399,500
	UNSA		X		399,500
HR	STH	X	X		20,000
HU	KASZ		X	6%	30,204
	KDFSZ		X		11,895 <sup>11</sup>
IE	Mandate		X	25%	30,000
	SIPTU	X	X		2,500
IT	FILCAMS-CGIL	X	X	100%	
	FIM-CISL	X	X		9,000
	FIOM-CGIL	X	X		90,000
	FISASCAT-CISL	X	X		
	UILM	X	X		
	UILTuCS-UIL	X	X		
LT	LKKDPS	No bargaining	No bargaining		
	LPSDPS		X	2%	
	SAMPRO		X		

<sup>11</sup> This is the number of SPAR workers. The Agreement was signed by KASZ.

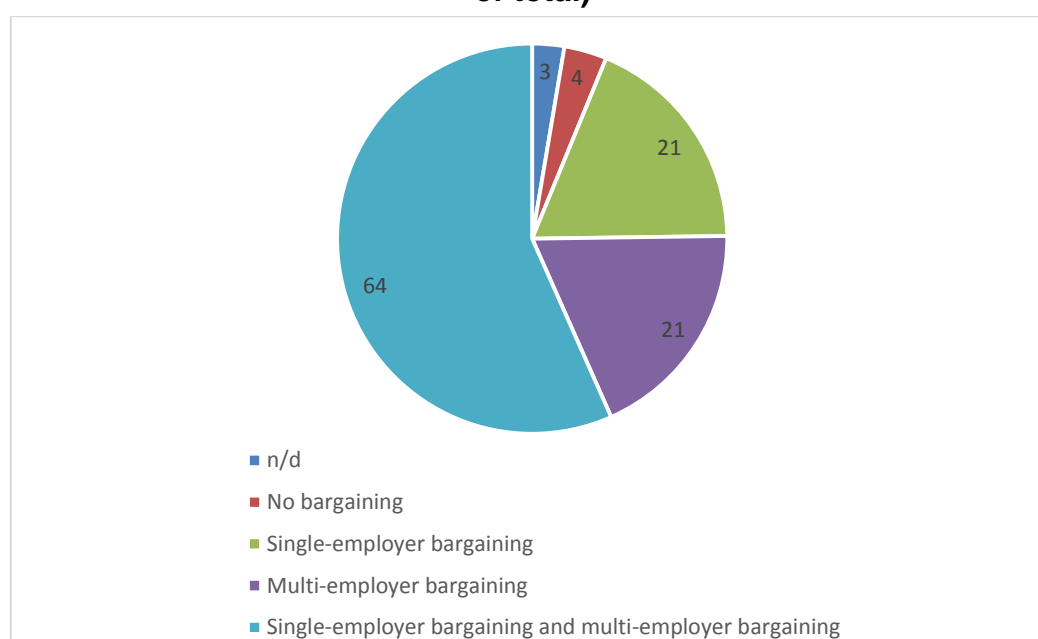
Country	Name	Multi-employer bargaining	Single-employer bargaining	Level of coverage	Number of workers covered
LU	Garages LCGB-ASG	X	X		6,000
	LCGB commerce, food processing and catering		X		11,500
	OGBL	X	X		14,000
LV	LTDA		X	8.6%	15,410
MT	GWU		X	4.5%	
	UHM Voice of the Workers		X		
NL	CNV Vakmensen	X	X		1,280,000
	FNV	X	X		575,000
	LBV	X	X		25,000
	VCP (formerly 'De Unie MHP')	X	X		250,000
	VHP		X		320
	W.I.M.		X		5,000
PL	FZZPSPHiU		X		22,000
	NSZZ Solidarność		X		
PT	CESP	X	X	92%	200,000
	SITese	X			77,000
RO	FSC		X	2%	13,000
SE	AHT	X			
	Farmaceuter	X			10,500
	Handels	X			300,000
	IF Metall	X			20,000
	Lederana	X			2,000
	Unionen	X			100,000
SI	SDTS	X	X	100%	
	SGS	X	X		100%
	STS-KS 90				100% but trade union not a signatory
SK	OZPOCR	X	X	15%	21,500
UK	GMB		X	14.1%	
	Unite		X		
	USDAW		X		725,610

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

Note: Members of UNI Europa are marked in bold

Figure 7 shows the involvement of trade unions in collective bargaining. The majority of trade unions in the commerce sector (57%) are involved in both multi-employer and single-employer collective bargaining. A further equal share of 19% either engage only in single-employer or only in multi-employer collective bargaining. Practices in this sector tend to follow general industrial relations practices in their Member States; for instance, with trade unions in France, Germany, Italy and in the Nordic countries generally involved in multi-employer or both multi-employer and single-employer bargaining, whereas in the Baltic states and a number of central and eastern European countries, single-employer bargaining is more common. No information on bargaining practices is available for 4% of unions in the sector and a further 3% of unions are not involved in any form of collective bargaining. One of these unions represents managerial staff whereas the others represent workers in countries with a more limited tradition of collective bargaining.

**Figure 7: Involvement of trade unions in different forms of collective bargaining (% of total)**



Source: Based on information from Network of Eurofound Correspondents' national contributions to this study (2017–2018)

Multi-employer bargaining predominates in countries such as Austria, Belgium, Denmark, Germany, Finland, France, Italy, Luxembourg, the Netherlands, Slovenia, Spain and Sweden. In Austria, coverage is nearly 100% due to compulsory membership in the employer organisations (WKÖ - Austrian Economic Chamber). In Belgium, France, Italy and Slovenia, coverage of collective agreements is high due to the extension of collective agreements.<sup>12</sup> The use of extensions is also widespread in the Netherlands and Spain, whereas in the Nordic countries (Denmark, Finland and Sweden) coverage is widespread largely due to high levels of membership in trade unions and employer organisations.

In Bulgaria, Estonia, Latvia, Lithuania, Malta and the UK, only single-employer bargaining takes place. Although both single- and multi-employer bargaining is present in countries such as Cyprus, the Czech Republic, Hungary and Ireland, single-employer bargaining predominates (particularly in the Czech Republic, Hungary and Ireland). In Greece and the Netherlands, some company-specific trade unions exist covering the workforce in these enterprises.

<sup>12</sup> Extension of collection agreements refers to a practice by which collective agreements are also applied to workers and employers not party to collective bargaining agreements. This is usually done through specific administrative procedures.

### Sector-relatedness and membership strength of employer organisations

The Network of Eurofound Correspondents identified 150 employer organisations in the commerce sector, covering all 28 Member States. As mentioned above, there is a significant degree of fragmentation among employer organisations in the sector, largely because many organisations represent either only one of the sectors which make up the commerce sector (NACE 45, 46, 47), or employers in several but not all of these sectors, or indeed only subsets of individual sectors. This is particularly prevalent in France, Italy and Spain.

Of the 150 employer organisations for which this information is available, 18% cover the entire commerce sector, 15% only organise employers in NACE 45, 25% only have members in the retail sector (NACE 47) and 3% of organisations only cover wholesale trade (NACE 46). The remainder (39%) cover a different subset of the commerce sector (usually NACE 46 and 47). The following table illustrates the NACE coverage of each employer organisation for which such information is available.

**Table 15: NACE code coverage of employer organisations**

Country	Employer organisation	NACE 45	NACE 46	NACE 47
AT	ÖAV	No	No	Yes
	FGTS	No	No	Yes
	WKÖ BGA	Yes	Yes	Yes
	WKÖ BGHADP	No	Yes	Yes
	WKÖ BIF	Yes	No	No
	WKÖ BSH	Yes	Yes	Yes <sup>13</sup>
BE	Comeos	No	Yes	Yes
	FGBB	No	Yes	Yes
	Grymafer	No	Yes	No
	NUHOS/UNEBO	No	Yes	Yes
	OPHACO	No	Yes	No
	Traxio	Yes	No	No
	UCM	Yes	No	Yes
	UNIZO	No	Yes	Yes
BG	AMT	No	Yes	Yes
	UTB	Yes	Yes	Yes
CY	KEBE	Yes	Yes	Yes
	SEMO	Yes	No	No
CZ	AČTO	No	Yes	Yes
	APEK	No	Yes	Yes
	SOCR ČR	Yes	Yes	Yes
DE	BGA	Yes	Yes	Yes

<sup>13</sup> Except pharmacies

Country	Employer organisation			
		NACE 45	NACE 46	NACE 47
	HDE	Yes	Yes	Yes
	ZDK	Yes	No	No
DK	ABAF	Yes	No	No
	BA	No	Yes	No
	Dansk Erhverv	Yes	Yes	Yes
	DI	Yes	Yes	Yes
	SKAD	Yes	No	No
EE	EEL	No	Yes	Yes
	EKL	Yes	Yes	Yes
	EKTK	Yes	Yes	Yes
EL	ESEE	Yes	Yes	Yes
	GSEVEE	Yes	Yes	Yes
	SELPE	No	No	Yes
ES	ACES	No	Yes	Yes
	AECQ	No	Yes	No
	AEFI	No	No	Yes
	AEVECAR	No	No	Yes
	AGES	No	No	Yes
	ANGED	No	Yes	Yes
	ASEDAS	No	Yes	Yes
	CEC	No	No	Yes
	CEEES	No	No	Yes
	CEGAL	No	No	Yes
	FANDE	No	Yes	No
	FEDEQUIM	No	Yes	No
	FEDIFAR	No	Yes	No
	FENPYD	No	No	Yes
	La Única	No	Yes	Yes
FI	AKL	Yes	No	No
	APTA	No	No	Yes
	ARL	Yes	No	No
	ETU	No	Yes	Yes
	Kauppa	No	Yes	Yes
FR	CDCF	No	No	Yes
	CDNA	No	Yes	Yes
	CGAD	No	No	Yes
	CGI	No	Yes	Yes

Country	Employer organisation	NACE 45	NACE 46	NACE 47
	CNPA	Yes	No	No
	FCD	No	Yes	Yes
	FEC	No	No	Yes
	Fédération de l'Horlogerie	No	Yes	Yes
	FEH	No	No	Yes
	FFC	Yes	No	No
	FFQ	No	No	Yes
	FICIME	No	Yes	No
	FMB	No	No	Yes
	FNAA	Yes	No	No
	FNH	No	No	Yes
	FNMJ	No	No	Yes
	FNP	No	No	Yes
	GNESA	Yes	No	No
	Les Professionnels du Pneu	Yes	Yes	No
	SNOR	No	No	Yes
	UBH	No	No	Yes
	UCV	No	No	Yes
	UDO	No	No	Yes
	UFIP	No	Yes	Yes
	Union Sport et Cycle	No	No	Yes
	UPECAD	No	No	Yes
HR	HGK	Yes	Yes	Yes
	HUP-Udruga trgovine	Yes	Yes	Yes
HU	ÁFEOSZ	No	Yes	Yes
	KISOSZ	No	No	Yes
	MNKSZ	No	Yes	Yes
	OKSZ	Yes	Yes	Yes
	VOSZ	Yes	Yes	Yes
IE	IBEC Retail Ireland	No	Yes	Yes
	ISME	Yes	No	Yes
	RGDATA	No	No	Yes
IT	AGCI	Yes	Yes	Yes
	ANCC-COOP	No	Yes	Yes
	ANCD CONAD	No	Yes	Yes
	Casartigiani	No	Yes	Yes

Country	Employer organisation	NACE 45	NACE 46	NACE 47
	Confartigianato	Yes	No	No
	Confcommercio	Yes	Yes	Yes
	Confesercenti	Yes	Yes	Yes
	CLAAI	Yes	No	No
	CNA	Yes	No	No
	Federconsumo	No	Yes	Yes
	Federdistribuzione	No	Yes	Yes
LT	LPIA	Yes	Yes	Yes
LU	ADAL	Yes	No	No
	CLC	Yes	Yes	Yes
	FDA	Yes	Yes	Yes
	FEGARLUX	Yes	No	No
LV	LPTA	No	Yes	Yes
	LTA	No	Yes	Yes
MT	GRTU	Yes	Yes	Yes
NL <sup>14</sup>	BOVAG	Yes	No	No
	CBL	No	No	Yes
	Dibevo	No	Yes	Yes
	Inretail	No	No	Yes
	MKB-Nederland	Yes	Yes	Yes
	NVCW	No	No	Yes
	RND	No	No	Yes
	Vakcentrum	No	No	Yes
	VGT	No	No	Yes
	VWDHZ	No	No	Yes
	WTG	No	Yes	No
PL	FPH	Yes	Yes	Yes
	PIH	Yes	Yes	Yes
	POHiD	Yes	Yes	Yes

<sup>14</sup> In the Netherlands, there are three umbrella organisations active in the commerce sector (Detailhandel Nederland, MKB-Nederland and RND, which is in itself a branch organisation of Detailhandel Nederland). MKB-Nederland covers commerce (retail) but also SME activities in other sectors, like business services, hotels, cafés and restaurants, cleaning, etc. Furthermore, in the commerce sector in the Netherlands, there are 8 employer branch organisations representing more than 10,000 employees (BOVAG, Inretail, Vakcentrum, VDF, VGL, VGSB, VGT and VWDHZ), 5 branch organisations representing between 5,000–10,000 employees (NVCW, Tuinbranche Nederland, UFON, UNETO-VNI and VBN) and 32 branch organisations representing fewer than 5,000 employees among their employers (ADN, ANEVEI, BETA, BKN, Bodepa, CBD, CVAH, Dibevo, FWS, GDH, KBb, KNBD, Koninklijke Slijtersunie, KVNW, NJU, NNVER, NOVAKA, NOVE, NPMB, NSO, NVVW, SCTX, SNF, Spirits NL, VDB, VDN, Vereniging voor de groothandel in Zoetwaren, Tabak, en/of Tabaksproducten, VOG, VMN, VNV, WACO, WTG).



Country	Employer organisation	NACE 45	NACE 46	NACE 47
PT	ACAP	Yes	No	No
	ACB	No	No	Yes
	ACPorto	No	Yes	Yes
	ADIPA	No	Yes	Yes
	ANECRA	Yes	No	No
	APED <sup>15</sup>	Yes	Yes	Yes
	ARAN	Yes	No	No
	CCP <sup>16</sup>	No	Yes	Yes
RO	AMRCR	No	No	Yes
	FRPC	No	Yes	Yes
SE	Almega	No	Yes	Yes
	KFO	No	Yes	Yes
	Livsmedelsföretagen	No	Yes	Yes
	MAF	Yes	No	Yes
	SLA	No	Yes	Yes
	Svensk Dagligvaruhandel	No	Yes	Yes
	Svensk Handel	Yes	Yes	Yes
	TeknikGrossisternas Arbetsgivareförening	Yes	Yes	No
SI	OSZ	Yes	No	Yes
	PTZ	Yes	Yes	Yes
	TZSLO	Yes	Yes	Yes
	ZDS	Yes	Yes	Yes
SK	COOP Jednota	No	Yes	Yes
	SAMO	No	No	Yes
	ZOCR SR	No	Yes	Yes
UK	BRC	Yes	Yes	Yes

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

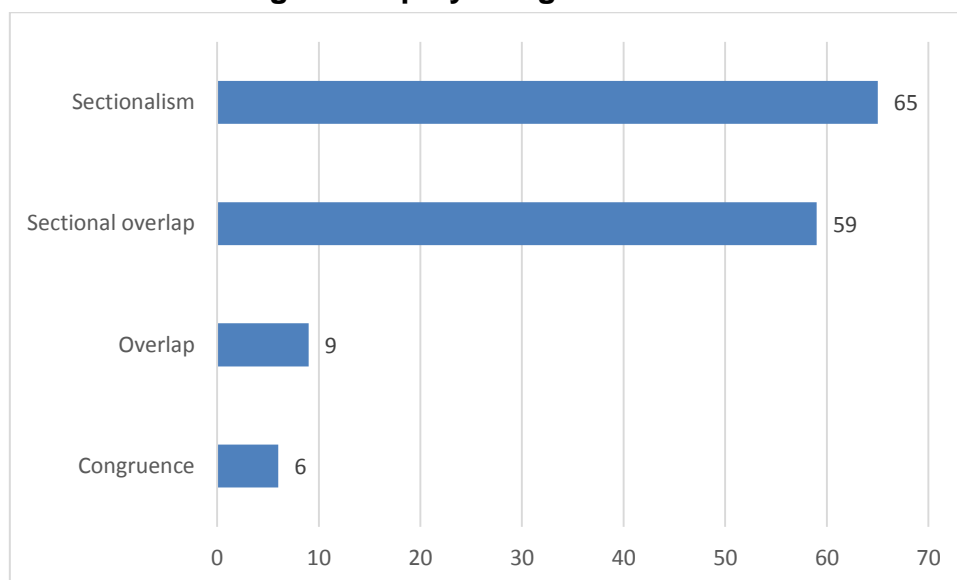
As Figure 8 shows, just under half of the 150 employer organisations identified (46%) only cover part of the sector (because they either only cover one or several relevant NACE codes or they do not cover all types of

<sup>15</sup> APED is the association of the largest distributors, supermarkets and commercial centres in Portugal, with 141 member companies employing about 85,000 people, APED is involved in collective bargaining and affiliated to EuroCommerce.

<sup>16</sup> CCP is the employer confederation representing 81 commerce sector associations (and 19 service sector associations). It represents the largest number of companies in the commerce sector. It is widely representative for the smaller and medium sized companies (200,000 companies and around 1,000,000 workers). CCP is involved in sector-level collective bargaining (following up 40 collective contracts) and is affiliated to EuroCommerce.

businesses, e.g. large and small), and do not have membership outside the commerce sector (sectionalism). 42% represent employer organisations which only cover part of the sector and have membership within, as well as outside, the commerce sector (sectional overlap). A further 6% cover the whole of the commerce sector (and have members outside this sector) and 4% are congruent with the entire commerce sector (covering all NACE codes). Table 16 specifies the domain patterns of the individual employer organisations. No information is available for the remaining organisations.

**Figure 8: Domain coverage of employer organisations in the commerce sector**



**Table 16: Domain pattern of employer organisations**

Country	Congruence	Sectionalism	Overlap	Sectional overlap
AT		WKÖ BGA, WKÖ BGHADP, WKÖ BIF, WKÖ BSH, ÖAV		FGTS
BE	Grymafer	Comeos, FGBB, Traxio		NUHOS/UNEBO, OPHACO, UCM, UNIZO
BG		AMT		
CY			KEBE	SEMO
CZ			SOCR ČR	
DE	HDE	ZDK		BGA
DK		ABAF, BA, SKAD	Dansk Erhverv, DI	
EE			EKL, EKTK	EEL
EL				ESEE, GSEVEE, SELPE
ES		ACES, AECQ, AEFI, AEVECAR, AGES, ANGED, ASEDAS, CEC, CEES, CEGAL, FANDE, FEDEQUIM, FENPYD, La Única		FEDIFAR
FI		APTA, Kauppa		AKL, ARL, ETU

FR		<b>CDCF, CDNA, CGI, FCD, FEC, Fédération de l'Horlogerie, FEW, FFC, FNAA, FNMJ, GNEA, SNOR, UBH, UCV, UDO, UPECAD</b>		<b>CGAD, CNPA, Les Professionnels du Pneu, UFIP, Union Sport et Cycle</b>
HR	<b>HUP-Udruga trgovine</b>			<b>HGK</b>
HU		ÁFEOSZ, KISOSZ, MNKSZ, <b>OKSZ</b>		<b>VOSK</b>
IE		<b>IBEC Retail Ireland</b>		ISME, RGDATA
IT		ANCC-COOP, <b>Federdistribuzione</b>	<b>Confcommercio</b> , Confesercenti,	ANCD CONAD, Casartigiani, CLAAI, CNA, Confartigianato
LT			<b>LPIA</b>	
LU		<b>ADAL</b> , FEGARLUX		<b>CLC</b> , FDA
LV		<b>LPTA</b>		<b>LTA</b>
MT				<b>GRTU</b>
NL		<b>CLB</b> , Dibevo, <b>Inretail</b> , <b>Vakcentrum</b> , VGT, <b>VWDHZ</b> , WTG		BOVAG, NVCW
PL	FPH	<b>POHiD</b>	PIH	
PT		<b>ACB, ACPorto, ANECRA, APED</b>		<b>ACAP, ADIPA, CCP</b>
RO		<b>AMRCR, FRPC</b>		
SE	<b>Svensk Handel</b>	MAF, TeknikGrossisternas Arbetsgivareförening		Almega, KFO, Livsmedelsföretagen, <b>Svensk Dagligvaruhandel</b>
SI				OZS, PTZ, <b>TZSLO</b> , ZDS
SK	<b>SAMO</b>	<b>COOP Jednota</b>		<b>ZOCR SR</b>
UK	<b>BRC</b>			

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018) Note: the organisations marked in bold are the ones affiliated to EuroCommerce.

Table 17 shows the membership strength (organisational density) of employer organisations in the commerce sector. This can be assessed in two different ways: by looking at the share of employers in the sector represented by different organisations, or by looking at the share of employees in the sector working in companies organised by specific employer organisations. The first way of calculating means that each company is considered equally, while in reality some companies are far more important for the sector than others. Therefore, it is most meaningful to combine the company-based calculation with a workforce-based calculation of the organisational strength. This is done by dividing the total workforce of all the affiliated companies by the total number of employees within the sector.

This is also important because data available on the coverage of employers in the sector is more limited (data is missing for 112 out of 150 organisations<sup>17</sup>). Somewhat more information is available on the share of employees in the sector covered by member organisations. The table below demonstrates that the calculation of employer density in relation to the number of employers covered can be misleading (even in countries where data is available for all employer organisations). In most countries, the share of employees covered is significantly higher than the share of employers covered. A low density of coverage of employers vis-à-vis all enterprises in the sector in countries where density (measured by share of employees covered) is rather high simply demonstrates that many of the largest employers in the country are members of employer organisations, whereas smaller employers are less likely to be members. This is particularly noticeable in Estonia, but also in Finland and Luxembourg.

In Austria, compulsory membership means that there is 100% coverage in relation to employer organisations. Estonia, Hungary, Luxembourg and Slovenia also have high density rates in relation to employees covered (over 80%). However, in a number of countries where data is available for all employer organisations, coverage of employees in the sector is relatively low (e.g. in Bulgaria, Lithuania, Romania and Slovakia, where coverage is under 25%). Overall, these figures need to be assessed with caution due to the high number of missing data points.

**Table 17: Organisational density (in terms of employee coverage)**

Country	Total sector employees	Employees covered by employer organisations in the sector (and number of organisations covered)	Density	Total sector enterprises	Enterprises covered by employer organisations in the sector (and number of organisations covered)	Density
AT	571,298	571,298 (all)	100%	77,930	77,930 (all) <sup>18</sup>	100%
BE	486,816	18,000 (1 out of 8)	5.2%	136,451	10,754 (2 out of 8)	7.9%
BG	377,147	22,921 (all)	6.1%	137,970	12 (all)	0.01%
CY	60,043	1,200 (1 out of 2)	2%	16,070	4,020 (all)	25%
CZ	449,400	150,000 (2 out of 3)	33.4%	241,572	428 (all)	0.2%
DE	5,571,105	n/d	n/d	602,128	225,000 (2 out of 3)	37.7%
DK	405,526	75,000 (2 out of 5)	20%	41,095	6,880 (2 out of 5)	16.7%
EE	74,700	77,158 (2 out of 3)	92.2%	16,088	1,390 (all)	8.6%
EL	386,784	420,000 (2 out of 3)	62.6%	717,265	150,120 (2 out of 3)	21%
ES	2,207,750	469,370 (6 out of 15)	22.3%	253,167	4,052 (5 out of 15)	1.6%
FI	240,048	126,950 (4 out of 5)	52.9%	725,880	3,790 (all)	0.5%
FR	3,030,069	115,465 (5 out of 25)	3.8%	43,695	5,789 (7 out of 26)	13.2%
HR	208,889	60,000 (1 out of 2)	29%	135,111	5,000 (1 out of 2)	3.7%
HU	468,562	438,000 (all)	93%	37,340	21,100 (all)	56.5%
IE	345,911	n/d	n/d	46,626	n/d	n/d
IT	1,941,454	1,534,000 (5 out of 11)	79%	1,105,227	33,656 (5 out of 11)	3%

<sup>17</sup> Information provided by the Network of Eurofound Correspondents indicates no data available. This is sometimes because employer organisations represent a number of sectoral federations for which membership data is not available.

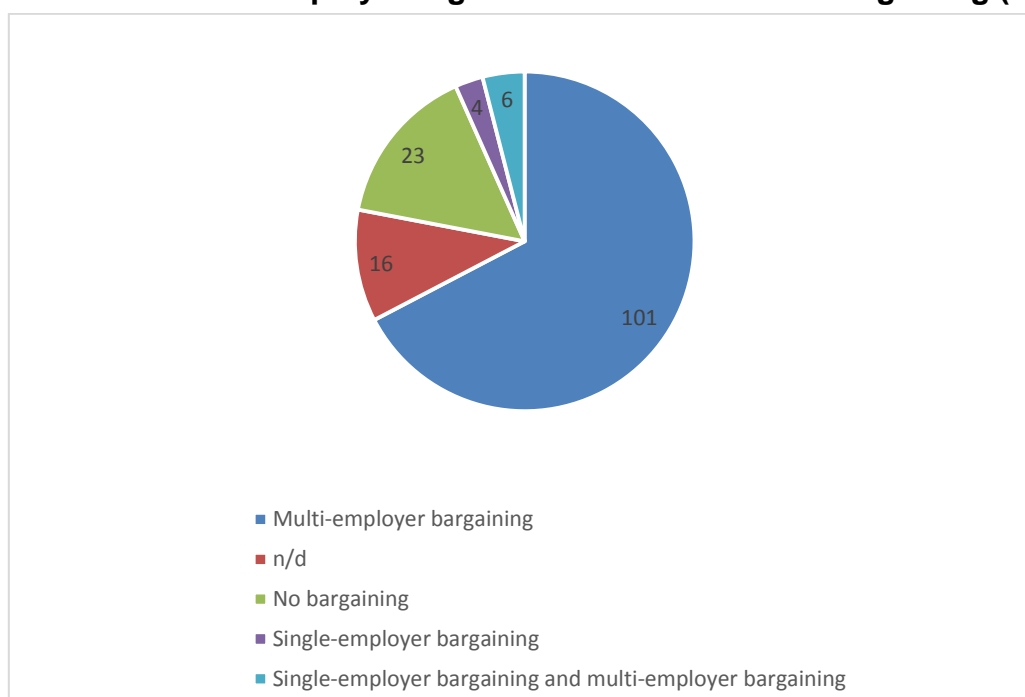
<sup>18</sup> In fact, the number of declared members is higher, but adjusted as this is also likely to count some companies outside the sector.

Country	Total sector employees	Employees covered by employer organisations in the sector (and number of organisations covered)	Density	Total sector enterprises	Enterprises covered by employer organisations in the sector (and number of organisations covered)	Density
LT	199,700	30,000 (all)	15%	28,580	18 (all)	0.1%
LU	49,449	41,500 (all)	84%	61,054	4,198 (all)	6.9%
LV	153,663	13,500 (1 out of 2)	8.8%	7,699	108 (all)	1.4%
MT	24,164	n/d	n/d	8,845	n/d	n/d
NL	1,107,000	319,884 (5 out of 11)	28.9%	246,561	11,581 (6 out of 11)	4.7%
PL	1,925,000	200,000 (1 out of 3)	10.4%	499,700	26 (2 out of 3)	0.01%
PT	478,256	96,785 (2 out of 8)	20.2%	222,034	273 (1 out of 8)	0.1%
RO	1,045,590	187,000 (all)	17.9%	171,961	34 (all)	0.02%
SE	523,024	277,239 (4 out of 8)	53%	127,894	10,410 (3 out of 8)	8.1%
SI	99,382	88,000 (2 out of 4)	88.5%	26,180	5,086 (all)	19.4%
SK	256,400	56,186 (all)	22%	109,720	118 (all)	0.1%
UK	4,854,000	n/d	n/d	361,237	90 (all)	0.02%

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018); SBS (for number of enterprises).

### Commerce employer organisations involvement in collective bargaining

In the previous section, the sector-relatedness and membership strength of employer organisations was considered. This section considers their involvement in collective bargaining and the number of employees covered by collective bargaining agreements signed by the employer organisations in the sector. Figure 9 provides an overview of the share of single-employer and multi-employer bargaining in the sector. Just over 68% of employer organisations are involved in multi-employer collective bargaining. A further 4% are involved in both multi- and single-employer bargaining and 3% only engage in single-employer bargaining. However, 16% of employer organisations do not participate in any form of collective bargaining. No information is available for the remaining organisations. It is still possible for bargaining to take place at the level of the individual employer. However, this takes place without the involvement of employer organisations. This is particularly noticeable in the Czech Republic, Estonia, Hungary, Lithuania, Malta, Poland, Romania and the UK, where the lack of involvement of key employer organisations (or the only employer organisation) means that bargaining is entirely at the company level without involvement from employer organisations. Other countries where there are also some employer organisations not involved in collective bargaining include Bulgaria, Cyprus and Luxembourg. Table 18 provides a more detailed picture on this for each Member State.

**Figure 9: Involvement of employer organisations in collective bargaining (% of total)**

Source: Based on information from Network of Eurofound Correspondents' national contributions to this study (2017–2018)

**Table 18: Collective bargaining involvement of employer organisations**

Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
AT	FGTS	1,500	10,000	Multi-employer bargaining	10,000
	ÖAV	1,350	11,000	Multi-employer bargaining	11,000
	<b>WKÖ BGA</b>	2,561	7,621	No bargaining	n/a
	<b>WKÖ BGHADP</b>	3,278	31,017	Multi-employer bargaining	31,017
	WKÖ BIF	5,000	20,000	Multi-employer bargaining	20,000
	<b>WKÖ BSH</b>	67,000	540,000	Multi-employer bargaining	540,000
BE	<b>Comeos</b>	n/d	n/d	Multi-employer bargaining	n/d
	FGBB	30	18,000	Multi-employer bargaining	4,500

Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
	Grymafer	65	1,500	No bargaining	n/d
	NUHOS/UNEBO	340	4,600	Multi-employer bargaining	n/d
	OPHACO	13 member organisations with 600 pharmacies	1,153	Multi-employer bargaining	n/d
	Traxio	9,724	n/d	Multi-employer bargaining	n/d
	UCM	n/d	n/d	Multi-employer bargaining	n/d
	UNIZO	n/d	n/d	Multi-employer bargaining	n/d
BG	AMT	12	22,071	No bargaining	n/a
	UTB	n/d	850	Multi-employer bargaining	n/d
CY	KEBE	4,000	n/d	No bargaining	n/d
	SEMO	20	1,200	Multi-employer bargaining	350
CZ	AČTO	8	30,000	No bargaining	n/a
	APEK	420	n/d	No bargaining	n/a
	SOCR ČR	25	120,000	Single-employer bargaining, multi-employer bargaining	80,000
DE	BGA	125,000	n/d	Multi-employer bargaining	n/d
	SOCR ČR	25	120,000	Single-employer bargaining, multi-employer bargaining	80,000
	ZDK	n/d	n/d	Multi-employer bargaining	n/d
	ABAF	n/d	n/d	Multi-employer bargaining	n/d
DK	BA	380	5,600	Multi-employer bargaining	5,600

Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
	<b>Dansk Erhverv</b>	6,500	75,000	Multi-employer bargaining	75,000
	DI	n/d	n/d	Multi-employer bargaining	n/d
	SKAD	n/d	n/d	Multi-employer bargaining	n/d
EE	EEL	151	n/d	No bargaining	n/a
	<b>EKL</b>	52	26,000	No bargaining	n/a
	EKTK	1,187	51,158	No bargaining	n/a
EL	<b>ESEE</b>	150,000	300,000	Multi-employer bargaining	n/d
	GSEVEE	n/d	n/d	Multi-employer bargaining	n/d
	SELPE	120	120,000	No bargaining	n/a
ES	<b>ACES</b>	12	n/d	No bargaining	n/a
	AECQ	1,700	n/d	Multi-employer bargaining	n/d
	AEFI	n/d	n/d	Multi-employer bargaining	n/d
	AEECAR	n/d	n/d	Multi-employer bargaining	n/d
	AGES	n/d	n/d	Multi-employer bargaining	n/d
	<b>ANGED</b>		20	Multi-employer bargaining	n/d
	<b>ASEDAS</b>		150	No bargaining	n/a
	CEC		450,000	Multi-employer bargaining	n/d
	CEEES	n/d	n/d	Multi-employer bargaining	n/d
	CEGAL	1,600	n/d	Multi-employer bargaining	25,000
	FANDE		200	Multi-employer bargaining	25,000
	FEDEQUIM	n/d	n/d	Multi-	n/d



Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
				employer bargaining	
	FEDIFAR	40	7,000	Multi-employer bargaining	7,000
	FENPYD	700	12,000	Multi-employer bargaining	50,000
	La Única	n/d	n/d	Multi-employer bargaining	n/d
FI	AKL	500	19,000	Multi-employer bargaining	31,000
	APTA	620	6,500	Multi-employer bargaining	8,000
	ARL	70	1,450	Multi-employer bargaining	1,200
	ETU	400	n/d	n/d	n/d
	Kauppa	2,200	100,000	Single-employer bargaining, multi-employer bargaining	40,000
FR	CDCF	29 professional federations	n/d	No bargaining	n/a
	CDNA	1,851	14,344	Multi-employer bargaining	72,595
	CGAD	10 professional associations	n/d	Multi-employer bargaining	1,100,000
	CGI	n/d	n/d	Multi-employer bargaining	947,000
	CNPA	10 professional associations	n/d	Multi-employer bargaining	399,500
	FCD	n/d	n/d	Multi-employer bargaining	603,137
	FEC	n/d	14,000	Multi-employer bargaining	20,000
	Fédération de l'Horlogerie	n/d	n/d	Multi-employer bargaining	1,406
	FEH	60	n/d	Multi-employer	120,000

Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
				bargaining	
	FFC	n/d	n/d	Multi-employer bargaining	399,500
	FFQ	n/d	n/d	Multi-employer bargaining	27,000
	FICIME	n/d	n/d	Multi-employer bargaining	n/d
	FMB	n/d	n/d	Multi-employer bargaining	70,000
	FNAA	3,000	15,121	Multi-employer bargaining	399,500
	FNH	n/d	n/d	Multi-employer bargaining	80,000
	FNMJ	6	n/d	Multi-employer bargaining	20,250
	FNP	n/d	n/d	Multi-employer bargaining	n/d
	GNESA	n/d	n/d	Multi-employer bargaining	399,500
	Les Professionnels du Pneu	n/d	n/d	Multi-employer bargaining	399,500
	SNOR	n/d	n/d	Multi-employer bargaining	n/d
	UBH	850	12,000	Multi-employer bargaining	17,264
	UCV	13	60,000	Multi-employer bargaining	60,000
	UDO	n/d	n/d	Multi-employer bargaining	n/d
	UFIP	9	n/d	Multi-employer bargaining	n/d
	Union Sport et Cycle	n/d	n/d	Multi-	n/d

Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
				employer bargaining	
	<b>UPECAD</b>	n/d	n/d	Multi-employer bargaining	31,522
HR	<b>HGK</b>	n/d	n/d	n/d	n/d
	<b>HUP-Udruga trgovine</b>	5,000	60,000	Single-employer bargaining	n/d
HU	<b>ÁFEOSZ</b>	8,300	28,000	n/d	n/d
	<b>KISOSZ</b>	3,000	60,000	n/d	n/d
	<b>MNKSZ</b>	n/d	n/d	n/d	n/d
	<b>OKSZ</b>	4,500	300,000	n/d	n/d
	<b>VOSZ</b>	5,300	n/d	n/d	n/d
IE	<b>IBEC Retail Ireland</b>	n/d	n/d	Single-employer bargaining	n/d
	ISME			n/d	
	RGDATA			n/d	
IT	AGCI	n/d	n/d	Multi-employer bargaining	n/d
	ANCC-COOP	90	54,000	Multi-employer bargaining	n/d
	ANCD CONAD	2,700	51,000	Multi-employer bargaining	51,000
	Casartigiani	n/d	n/d	Multi-employer bargaining	n/d
	CLAAI	n/d	n/d	Multi-employer bargaining	n/d
	CNA	n/d	n/d	Multi-employer bargaining	n/d
	Confartigianato	n/d	n/d	Multi-employer bargaining	n/d
	<b>Confcommercio</b>	300,000	1,200,000	Single-employer bargaining, multi-employer bargaining	2,000,000

Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
	Confesercenti	n/d	n/d	Single-employer bargaining, multi-employer bargaining	n/d
	Federconsumo	576	9,000	Multi-employer bargaining	n/d
	<b>Federdistribuzione</b>	200	220,000	Multi-employer bargaining	n/d
LT	<b>LPIA</b>	18	30,000	No bargaining	n/a
LU	<b>ADAL</b>	60	3,000	Multi-employer bargaining	6,000
	<b>CLC</b>	4,000	28,000	No bargaining	n/a
	FDA	8	7,500	No bargaining	n/a
	FEGARLUX	130	3,000	Multi-employer bargaining	6,000
LV	<b>LPTA</b>	3	13,500	Single-employer bargaining	13,410
	<b>LTA</b>	105	n/d	Single-employer bargaining	n/d
MT	<b>GRTU</b>	n/d	n/d	No bargaining	n/a
NL	BOVAG	7,500	70,000	Multi-employer bargaining	92,750
	<b>CBL</b>	n/d	n/d	Multi-employer bargaining	n/d
	Dibevo	1,100	n/d	Single-employer bargaining, multi-employer bargaining	3,500
	<b>Inretail</b>	n/d	n/d	Multi-employer bargaining	140,000
	<b>MKB-Nederland</b>	n/d	n/d	Multi-	n/d

Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
				employer bargaining	
	NVCW	157	5,384	Multi-employer bargaining	147,307
	RND	80	n/d	n/a (umbrella organisation)	n/a
	Vakcentrum	2,800	200,000	Multi-employer bargaining	147,307
	VGT	18	27,500	Multi-employer bargaining	15,500
	VWDHZ	6	17,000	Multi-employer bargaining	17,000
	WTG	n/d	n/d	Single-employer bargaining, multi-employer bargaining	40,000
PL	FPH	12	n/d	No bargaining	n/a
	PIH	n/d	n/d	n/d	n/d
	POHiD	14	200,000	No bargaining	n/a
PT	ACAP	2,000	n/d	Multi-employer bargaining	55,000
	ACB	585	5,872	Multi-employer bargaining	18,133
	ACPorto	13,717	45,600	Multi-employer bargaining	37,000
	ADIPA	273	11,785	Multi-employer bargaining	15,000
	ANECRA	n/d	n/d	Multi-employer bargaining	65,880
	APED	131	85,000	Multi-employer bargaining	85,000
	CCP	n/d	n/d	Multi-employer bargaining	n/d
RO	AMRCR	16	79,000	No bargaining	n/a
	FRPC	18	108,000	No bargaining	n/a
SE	Almega	n/d	300	Multi-employer	300

Country	Name	Total individual companies in membership	Total employees in these companies	Involvement in collective bargaining	Numbers of workers covered by bargaining
				bargaining	
	KFO	n/d	n/d	Multi-employer bargaining	n/d
	Livsmedelsföretagen	60	500	Multi-employer bargaining	500
	MAF	n/d	n/d	Multi-employer bargaining	n/d
	SLA	n/d	n/d	n/d	n/d
	<b>Svensk Dagligvaruhandel</b>	n/d	n/d	n/d	n/d
	<b>Svensk Handel</b>	10,338	274,139	Multi-employer bargaining	223,883
	TeknikGrossisternas Arbetsgivareförening	12	2,300	Multi-employer bargaining	n/d
SI	OZS	714	n/d	n/d	n/d
	PTZ	900	n/d	Multi-employer bargaining	99,382
	<b>TZSLO</b>	4,030	58,000	Multi-employer bargaining	99,382
	ZDS	156	30,000	Multi-employer bargaining	99,382
SK	<b>COOP Jednota</b>	39	14,186	Multi-employer bargaining	13,500
	<b>SAMO</b>	6	27,000	No bargaining	n/a
	<b>ZOCR SR</b>	79	15,000	Multi-employer bargaining	8,000
UK	<b>BRC</b>	90	n/a	No bargaining	n/a

*Note: Members of EuroCommerce are marked in bold*

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

## Collective bargaining patterns and social dialogue practices

As outlined previously, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations to participate in European social dialogue. Similarly, it is important for the implementation of any agreements made by European-level organisations at the national, regional and local level. The roles played by social partners in collective bargaining, social dialogue and public policymaking are therefore important components of representativeness. The relevance of the European sectoral social dialogue tends to increase with the growing ability of the national affiliates joint agreement

of the European organisations to regulate employment terms and influence national public policies affecting the sector (Perin and Léonard, 2011).

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). This is also demonstrated by the analysis of the involvement of commerce sector organisations in bipartite and tripartite bodies presented in this section. Multi-employer bargaining tends to have a greater significance in this regard, primarily because of the macro-economic impact of such agreements (unless of course there are single-employer agreements in place with very large employers that serve to set an industry 'standard' or signalling effect). As well as looking at their formal role with regard to bipartite and tripartite bodies, it is also important to ascertain the regularity of their involvement and whether they wield any significant influence in this area.

As demonstrated above, the vast majority of the 113 trade unions identified in the sector are involved in collective bargaining, while on the employer side around 18% are not involved in any form of collective bargaining. Table 19 provides a summary of the coverage and nature of collective bargaining.

The majority (56%) of trade unions in the commerce sector are involved in both multi-employer and single-employer collective bargaining. A further equal share of 19% engage either only in single-employer or only in multi-employer collective bargaining. Among the employer organisations, 73% are involved in multi-employer or in multi- and single-employer bargaining. Only 3% engage only in single-employer bargaining.

**Table 19: Collective bargaining, absolute figures**

	Trade unions		Employer organisations	
No collective bargaining involvement	3%	107 <sup>19</sup>  (95%)	16%	136 <sup>20</sup>  (91%)
Single-employer collective bargaining only	19%		3%	
Multi-employer collective bargaining	20%		68%	
Both single- and multi-employer collective bargaining	58%		4%	
Total	107		136	

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

Tables 20 presents the collective bargaining information on a country-by-country basis, illustrating the different national collective bargaining patterns and collective bargaining coverage. It provides an impression of the level of multi- and single-employer bargaining, taking into account that single-employer

<sup>19</sup> No data is available for 10 trade unions.

<sup>20</sup> No data is available for 16 employer organisations.

bargaining can also take place without the involvement of the employer organisation (which is not taken into account in the table above). This shows that although there are a number of countries where employer organisations are not involved in collective bargaining, single-employer bargaining nonetheless often takes place, although its coverage is frequently limited to few (mainly larger) employers. This is true for Estonia, Hungary, Lithuania, Malta, Poland, Romania, and the UK. However, partly as a result of the lack of involvement of employer organisations in collective bargaining (and certainly due to the absence of multi-employer bargaining), the rate of collective bargaining coverage remains low (usually below 15% and often below 10%).

As Table 21 shows, in no country where single-employer bargaining prevails is the collective bargaining coverage above 25% of the workforce. The lowest rate of collective bargaining coverage in the context of multi-employer bargaining can be found in Germany (with rates of around 45%). This is partly due to the relatively low rate of organisation among the workforce in the sector and the lack of extension of collective agreements. The highest rates of collective bargaining coverage can be found in Austria, Belgium, France, Italy, the Netherlands, Portugal and Slovenia. This is largely due to the extension of existing collective agreements to the majority of the sector. In the case of Austria, it can be attributed to compulsory membership in employer organisations and the prevalence of multi-employer bargaining. In Croatia, the rate of collective bargaining was significantly higher until 2014, when the employer organisation cancelled the multi-employer collective agreement. It has not since been possible to renew this collective agreement and single-employer bargaining has prevailed since then.

In a number of countries (such as France and Germany), separate collective agreements exist for workers in NACE 45.

**Table 20: Form/level of bargaining per country**

Form/level of bargaining	Countries
<b>Multi-employer bargaining</b> (multi-employer bargaining at sector level)	AT, BE, BG, DE, DK, EL, ES, FI, FR, IT, LU, NL, PT, SE, SI
<b>Multi-employer bargaining AND single-employer bargaining</b>	IE
<b>Single-employer bargaining</b> (single-employer bargaining at company level)	CY, CZ, EE, HU, HR, LV, LT, MT, PL, RO, SK, UK <sup>21</sup>
<b>No collective bargaining</b>	

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

<sup>21</sup> Single-employer bargaining takes place but without the involvement of the employer organisation.



**Table 21: Collective bargaining coverage and level**

	Collective bargaining coverage				Information not available
	90% or more	50%–90%	25%–50%	1%–25%	
<b>Single-employer collective bargaining sole level or prevailing level</b>				CY, CZ, EE, HR, HU, IE, LT, LV, MT, PL, RO, SK, UK	
<b>Multi-employer collective bargaining sole level or prevailing level</b>	AT, BE, ES, FR, IT, PT, SI	DK, FI, LU, NL, SE	DE		BG, EL
<b>No collective bargaining</b>					

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

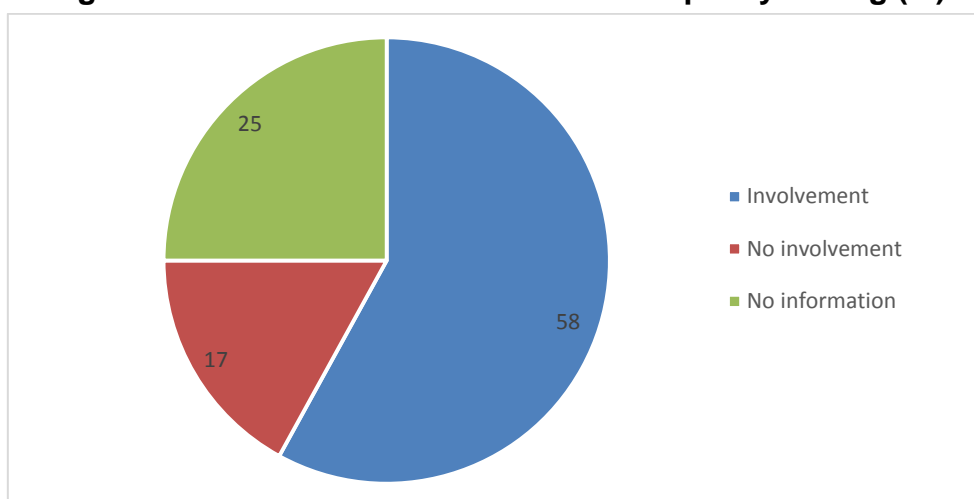
### *Participation in public policy*

In a significant number of Member States (particularly in northern and western Europe), the participation of social partners in public policymaking has long been established. In a number of other countries (particularly in central and eastern Europe) such involvement is more recent, but in many countries it is rather formalised, for instance in tripartite bodies at the central level. While in general policymaking, representation tends to be through peak organisations (sectoral federations), involvement in policymaking for sectoral organisations does take place in a number of countries with regard to sectoral policy (e.g. commerce sector strategy; legislation, for instance in relation to shop opening hours etc.). As indicated above, such involvement in policymaking is another relevant indicator of representativeness of national social partner organisations in the sector.

Such policy dialogue can be formal or informal and irrespective of its institutional set up, the level of influence wielded by social partner organisations in this arena is an important point to consider. The members of the Network of Eurofound Correspondents were asked to provide information on the involvement of the various employer and trade union organisations in public policymaking with a particular focus on the commerce sector, including an assessment of the nature of their influence.

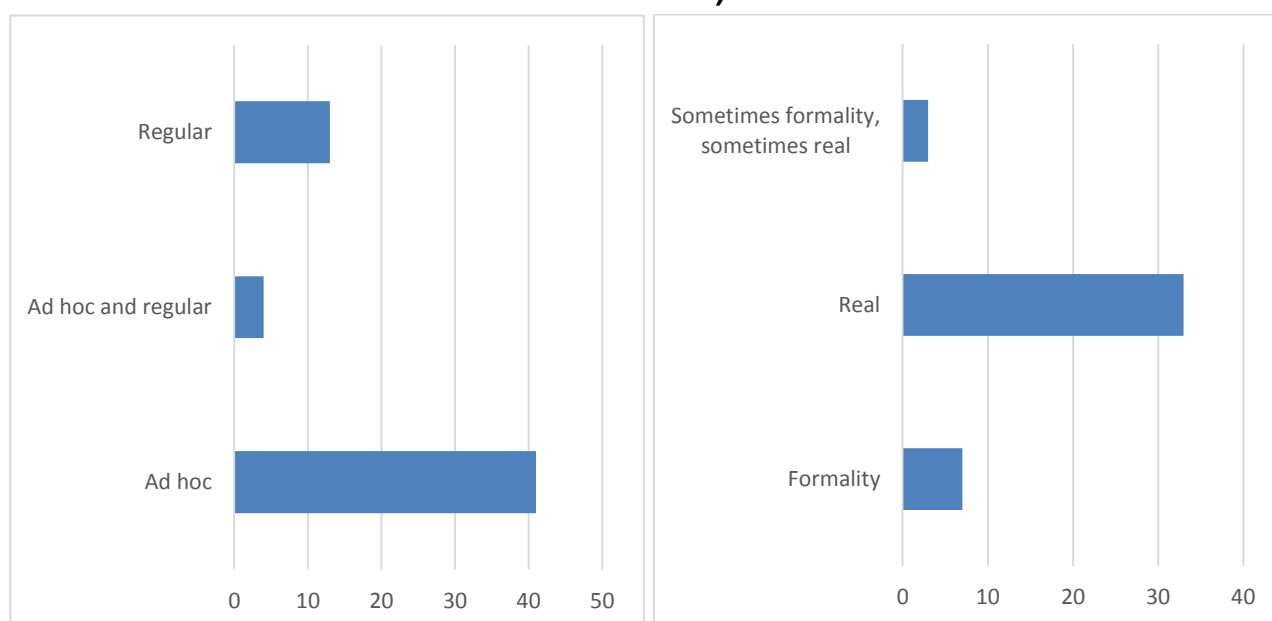
### **Trade unions or interest representation**

Figures 10 and 11 below provide an overview assessment of the nature and level of involvement of social partner organisations in relevant policymaking at Member State level. This shows that a (small) majority of trade unions are consulted in relation to sectoral policymaking (58%). 17% are not involved, and for the remaining organisations no information is available.

**Figure 10: Involvement of trade unions in policymaking (%)**

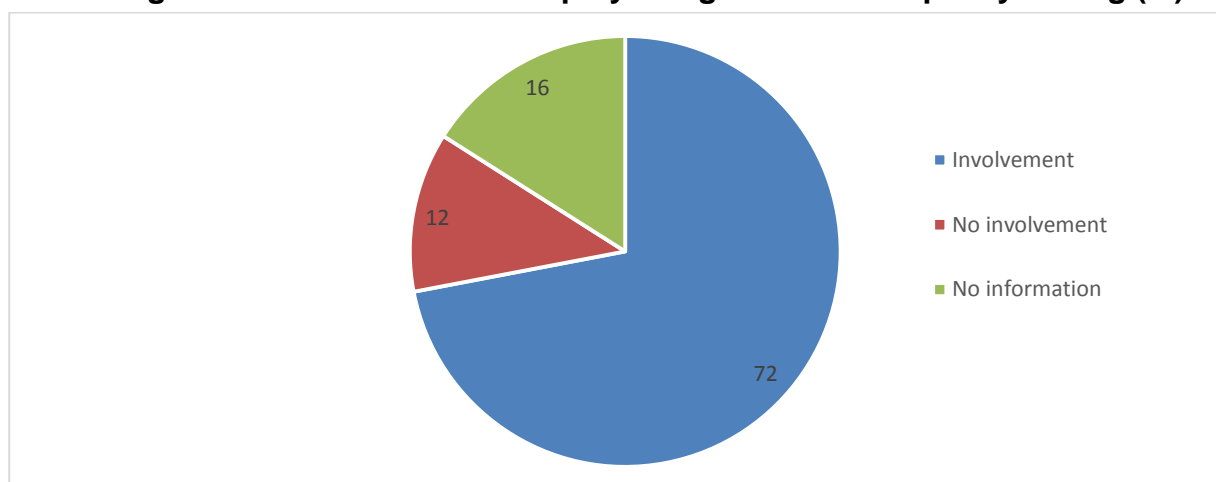
*Source: Calculated based on data provided by the Network of Eurofound Correspondents*

As shown in Figure 11, in most cases where information is available, consultation on sectoral matters takes place on an ad hoc basis. Consultation is only considered to be regular in 13 cases and in a further 4 cases, both regular and ad hoc consultation is considered to take place. Where consultation does take place, in 77% of cases, trade union organisations were considered (or judged) to have real influence. In a further 7% of cases, the level of influence was considered to depend on the topic at hand and the nature of the government. In the remaining cases, consultation was regarded a pure formality. Trade unions in Bulgaria, the Czech Republic and Poland were most likely to consider consultations a pure formality.

**Figure 11: Frequency of consultation with trade unions and level of influence (total numbers)**

*Source: Calculated based on data provided by Network of Eurofound Correspondents; N=58 for frequency of consultations; N=43 for trade union influence*

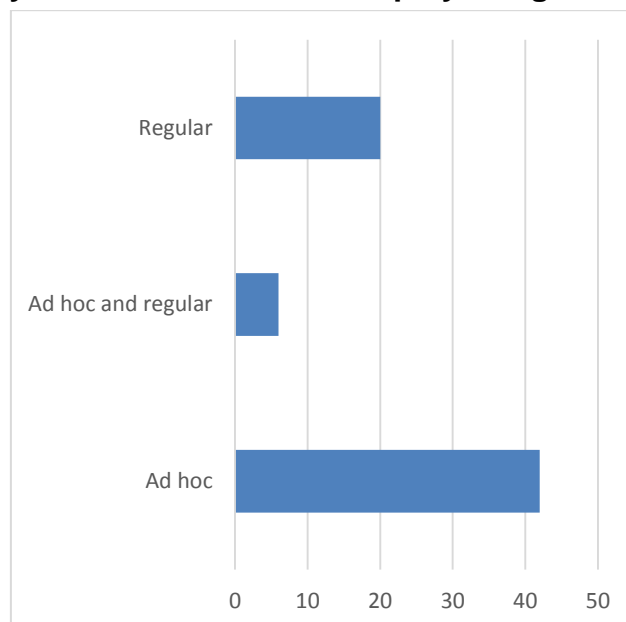
Among employer organisations, 72% were considered to be consulted in relation to sector policy, 12% had no involvement, and for the remaining 16% of organisations no information was available. Croatia, Greece and Romania are the only countries where all trade unions indicated that they are not consulted on sector-related policy matters. In all other Member States, at least one trade union reported being consulted. Bulgaria and Croatia are the only countries where (all) employer organisations said that they are not consulted in policymaking. A notable number of employer organisations in Spain also said that they are not consulted.

**Figure 12: Involvement of employer organisations in policymaking (%)**

Source: Calculated based on data provided by the Network of Eurofound Correspondents

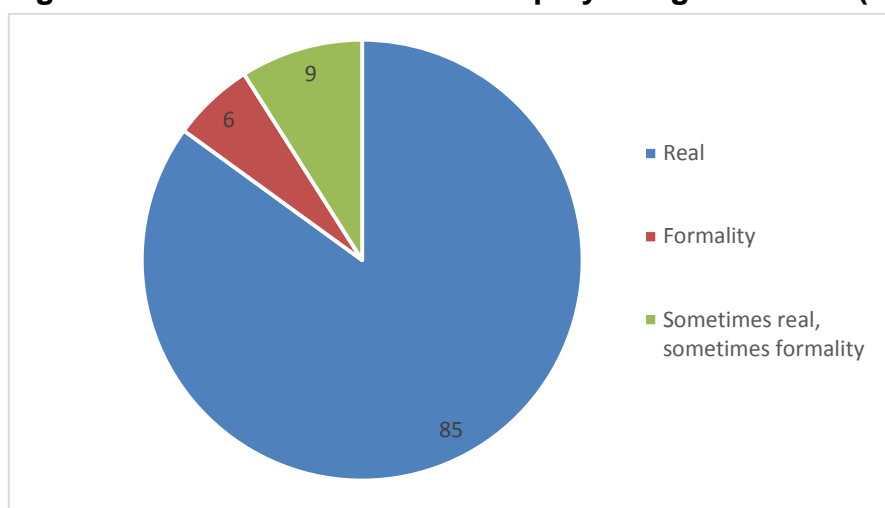
### Employer interest representation

Among employer organisations, in 62% of cases, consultation on sectoral issues was considered (or judged to be) taking place only on an ad hoc basis. Regular consultation was seen to take place in 29% of cases, with the remainder considering that both regular and ad hoc consultation takes place (see Figure 13). In the vast majority of cases (85%), employer organisations considered that they had real impact, and in a further 9% of cases the level of influence was considered to depend on the issue being discussed (see Figure 14). Involvement was more likely to be considered a pure formality by employer organisations in Poland and Romania.

**Figure 13: Frequency of consultation with employer organisations (total numbers)**

Note: N=68

Source: Calculated based on data provided by the Network of Eurofound Correspondents

**Figure 14: Level of influence of employer organisations (%)**

Note: N=53

Source: Calculated based on data provided by the Network of Eurofound Correspondents

The table below shows that neither employers nor trade union organisations are consulted in only one country (Croatia), with no trade unions being consulted on sectoral matters in Greece and Romania. In a number of Member States, at least one or several organisations say they are not consulted. There are a number of countries where all trade unions in the sector say they are consulted (Cyprus, Czech Republic, Italy, Latvia, Lithuania, Luxembourg, Malta, Poland, Slovakia, Slovenia and the UK), but this list cannot be considered exhaustive due to missing data for some organisations in some countries. Among employer organisations, all bodies say they are consulted in Belgium, Cyprus, Czech Republic, Finland, Greece, Hungary, Italy, Lithuania, Luxembourg, Romania, Slovakia, Slovenia and the UK. Again, due to missing data this list cannot be considered exhaustive.

**Table 22: Consultation of employers and trade unions by country**

	Trade unions consulted	No trade union consulted
<b>Employer organisation consulted</b>	AT, BE, BG, <b>CY, CZ</b> , DE, DK, EE, FI, FR, HU, IE, IT, <b>LU, LT</b> , LV, MT, NL, PL, PT, SE, <b>SI, SK</b> , <b>UK</b>	EL, RO
<b>No employer organisation consulted</b>		HR

Note: In the countries in bold, all trade union and employer organisations are considered to be consulted.

### Tripartite/bipartite participation

The following table identifies sector-related tripartite and/or bipartite bodies along with the participating trade unions and employer organisations. Such sector-related bodies are present in 15 countries.

**Table 23: Tripartite and bipartite sector-specific boards of public policy**

Country	Name of the body and scope of activity	Bipartite/ tripartite	Agreement/ statutory	Trade unions participating	Employer organisations participating
BE	Joint committee(s) <i>Responsible for sectoral negotiations and signing sectoral collective agreements</i>	Bipartite	Statutory	n/d	n/d
BG	Sectoral Council for Tripartite Cooperation, Ministry of Economy <i>Discussion of issues relating to commerce sector</i>	Tripartite	Statutory	ITUFECCTS; NFCSCT Podkrepa CL	UTB
CZ	RSHD ČR (tripartite) – team for internal market <i>All issues relating internal (domestic) market</i>	Tripartite	statutory	Representative of OSPO	Representative of SOCR ČR
DK	BAR IndustriAddresses <i>sector specific issues</i>	Bipartite	Statutory	Dansk Metal; HK; Dansk El forbund; NNF; Teknisk Landsforbund, TL; 3F	DI; Dansk Mode & Textil
	BFA Handel (Branchefælles-skab for Handel, Finans, Kontor) <i>Working environment association for Commerce, Finance, Office</i>	Bipartite	Statutory	HK Handel; NNF; Serviceforbundet	Benzin- og Oliebranchens Arbejdsgiverforening; Brugsforeningernes Arbejdsgiverforening, BA; Dansk Erhverv; Fællesforeningen for Danmarks Brugsforeninger (FDB); Danske Slagtermestre; Bager- og Konditormestre i Danmark
	Det faglige fællesudvalg for bager- og konditorfaget <i>Trade committee for vocational training</i>	Bipartite	Statutory	NNF	Dansk Erhverv

	<i>for the baker and confectioner profession</i>				
	Det faglige udvalg for detailhandelsuddannelsen <i>Trade committee for vocational training in retail</i>	Bipartite	Statutory	HK Handel	Dansk Erhverv; DI
	Det faglige udvalg for handelsuddannelsen <i>Trade committee for vocational training in commerce</i>	Bipartite	Statutory	HK Handel; HK Privat	Dansk Erhverv; DI
	Industriens Uddannelser <i>Trade committee for vocational training in industry</i>	Bipartite	Statutory	Dansk Metal; 3F	DI
	Malerfagets faglige fællesudvalg Painters committee	Bipartite	Statutory	Malerforbundet	AutoBranchens ArbejdsgiverForening; Danske Malermestre
EE	Estonian Qualifications Authority (Kutsekoda) professional council	Tripartite	Statutory	Estonian Trade Union of Commercial and Servicing Employees	Estonian Traders' Association
FI	Liiketoiminnan ja hallinnon osaamisen ennakointiryhmä <i>Competence prognostics group for business and administration</i>	Tripartite	Statutory	Federation of Public and Private Sector Employees (Jyty) / STTK; Finnish Business School Graduates (Ekonomit) / Akava; PAM / SAK; Trade Union for the Public Sector and Welfare Sectors (JHL) / SAK; Trade Union of Education OAJ; Union of Professional Business Graduates in Finland (TRAL) / Akava	Association of Finnish Independent Education Employers (AFIEE); Booksellers' Association of Finland / Federation of Finnish Enterprises (SY); Federation of Finnish Financial Services (Finance Finland, FFI) / EK; Finnish Commerce Federation / EK
	Työturvallisuuskeskuksen palveluryhmä (Occupational safety)	Tripartite	Agreement	Confederation of Unions for Professional and	Association of Finnish Independent

	sector group of the Centre for Occupational Safety for the service sector) <i>Promotes occupational safety within the sector and cooperation thereupon and develops working life at workplaces.</i>			Managerial Staff in Finland (Akava); SFL / Akava; Finnish Union of Practical Nurses (SuPer) / STTK; PAM / SAK; Trade Union for the Public Sector and Welfare Sectors (JHL) / SAK; Pro / STTK; Union of Health and Social Care Professionals in Finland (Tehy) / STTK	Education Employers (AFIEE); Confederation of Finnish Industries (EK); Federation of Finnish Financial Services (Finance Finland, FFI) / Service Sector Employers PALTA; Kauppa; Finnish Hospitality Association (MaRa); APTA; Private Employment Agencies Association (HPL); Real Estate Employers (Kiinteistötyöntajat); Welfare Federation (HALI, Hyvinvointialan liitto)
FR	APCDNA (Association Paritaire des Commerces de Détail Non-Alimentaires) <i>Social dialogue</i>	Bipartite	Agreement	CFDT-Services; CFTC-CSFV; FEC-FO; FNECS CFE-CGC	CDNA
	Commission paritaire de branche – CPB (Bipartite sector Commission) – <i>Collective bargaining within the tanning and leather sector</i>	Bipartite	Statutory and agreement		
	Commission Paritaire Nationale pour l'Emploi et la Formation Professionnelle (National bipartite commission on employment and	Bipartite	Statutory and agreement	All representative unions in each of the 40 branches	All representative employer organisations in each of the 40 branches

	professional training) <i>Professional training issues</i>				
	Forco <sup>22</sup>	Bipartite	Agreement	All representative unions within the scope of the national collective agreement covered by Forco	All representative employer organisations within the scope of the national collective agreement covered by Forco
	Intergros <sup>23</sup>	Bipartite	Agreement	All representative unions within the scope of the national collective agreement covered by Intergros	All representative employer organisations within the scope of the national collective agreement covered by Intergros
	IRP Auto <i>Complementary Social protection</i>	Bipartite	Agreement	All representative unions within the scope of the national collective agreement covered by IRP Auto	All representative employer organisations within the scope of the national collective agreement covered by IRP Auto
HU	Sectoral Dialogue Committee	Bipartite	Statutory	KASZ	ÁFEOSZ, KISOSZ, MNKSZ, OKSZ
IE	Oireachtas Committee	Tripartite	n/a	Mandate; SIPTU	IBEC Retail Ireland, ISME, RGDATA
IT	Cassa QUAS <i>Health fund</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	Confcommercio
	Coopform <i>Vocational training fund</i>	Bipartite	Statutory and agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	ANCC Coop; A.N.C.D.; C.C.I.; A.G.C.I.

<sup>22</sup> Forco covers the following branches: Importation exportation commission courtage (43); Chaussures commerce succursaliste (468); Habillement commerce succursales (675); Horlogerie (1044); Optique lunetterie de détail (1431); Horlogerie-bijouterie commerce de détail (1487); Commerce détail non alimentaire (1517); Bricolage vente au détail en libre-service (1606); Magasins grands populaires (2156); Vente à distance entreprises (2198); Commerce détail et gros à prédominance alimentaire (2216); Professions de la photographie (3168).

<sup>23</sup> Intergros covers the following branches: Commerces de gros (573); Quincaillerie commerces cadres (731); Quincaillerie commerces employés (1383); Tissus tapis linge de maison commerce de gros (1761).



Ebincoop <i>Monitoring and research tasks</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	ANCC Coop; A.N.C.D.; C.C.I.; A.G.C.I.	
EBN.TER. – Ente Bilaterale Nazionale per il Terziario (National Bilateral Institute for the Tertiary Sector) <i>Monitoring, research and training tasks</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	Confesercenti	
Ente Bilaterale Nazionale del Terziario (National Bilateral Tertiary Sector Institute) <i>Monitoring, research and training tasks</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	Confcommercio	
Fondartigianato <i>Vocational training fund</i>	Bipartite	Agreement	CGIL; CISL; UIL	Casartigiani; CLAAI; CNA; Confartigianato;	
Fondo di settore Aster <i>Health fund</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	Confesercenti	
Fondo di solidarietà bilaterale per l’artigianato <i>Income support fund</i>	Bipartite	Statutory and agreement	CGIL; CISL; UIL	Casartigiani; CLAAI; CNA; Confartigianato;	
Fondo EST <i>Health fund</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	Confcommercio	
Fondo paritetico interprofessionale Foncoop <i>Vocational training fund</i>	Bipartite	Statutory and agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	ANCC Coop; A.N.C.D.; C.C.I.; A.G.C.I.	
Fondo paritetico interprofessionale nazionale <i>Vocational training fund</i>	Bipartite	Statutory and agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	Confesercenti	
Fondo paritetico interprofessionale ForTE <i>Vocational training fund</i>	Bipartite	Statutory and agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	Confcommercio	
Fondo pensione negoziale FONTE <i>Pension fund</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	Confcommercio	

	Fondo pensione negoziale Previcooper <i>Pension fund</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTuCS-UIL	ANCC Coop; A.N.C.D.; C.C.I.; A.G.C.I.
	Fondo sanitario Coopersalute <i>Health fund</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTUCS-UIL	ANCC Coop; A.N.C.D.; C.C.I.; A.G.C.I.
	Osservatorio nazionale <i>Monitoring tasks</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTUCS-UIL	Confcommercio
	Osservatorio nazionale <i>Monitoring and research tasks</i>	Bipartite	Agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTUCS-UIL	Confesercenti
	Quadrifor <i>Vocational training fund</i>	Bipartite	Statutory and agreement	FILCAMS-CGIL; FISASCAT-CISL; UILTUCS-UIL	Confcommercio
NL	BPF AVH Pension fund <i>wholesale agrarian foodstuffs</i>	Bipartite	Agreement	CNV Vakmensen; FNV	ANVE; Gemzu; GroentenFruit Huis; NAO
	BPF Foodservice Pension fund food <i>wholesale</i>	Bipartite	Agreement	Unknown, but likely CNV Vakmensen and FNV	Unknown, but likely VOG
	BPF Houthandel Pension fund dealers <i>in wood</i>	Bipartite	Agreement	Unknown, but likely CNV Vakmensen and FNV	Unknown
	BPFL Pension fund <i>supermarkets</i>	Bipartite	Agreement	CNV Vakmensen; FNV	Vakcentrum; VGL
	HiBiN Pension fund dealers <i>in construction materials</i>	Bipartite	Agreement	CNV Vakmensen; FNV	HiBiN (Vereniging van handelaren in bouwmaterialen in Nederland)
	Pensioenfondsen Detailhandel <i>Pension fund retail</i>	Bipartite	Agreement	CNV; FNV	MKB- Nederland; RND
	Pensioenfondsen Dranken <i>Pension fund beverages</i>	Bipartite	Agreement	CNV Vakmensen; FNV; VCP	FWS; GDH; KNVW; Spirits NL
	PGB Pension fund <i>wholesale flowers and plants</i>	Bipartite	Agreement	CNV Vakmensen; FNV	VGB
	SPNG Pension fund <i>wholesale and recycling of paper and textiles</i>	Bipartite	Agreement	CNV Vakmensen; FNV; VCP	FNOI; NVG; VHT

RO	Social and Economic Council	Tripartite	Statutory	Indirect representation through CNS Cartel Alfa representatives (as FSC is affiliated to them)	Indirect representation through CONCORDIA Confederation (as FPRC and ANRCR are affiliated to them)
	Social Dialogue Commission of the Ministry of Labor and Social Justice	Tripartite	Statutory	Indirect representation through CNS Cartel Alfa representatives (as FSC is affiliated to them)	Indirect representation through CONCORDIA Confederation (as FPRC and ANRCR are affiliated to them)
SK	Social and Economic Council	Tripartite	Statutory	Indirect representation through CNS Cartel Alfa representatives (as FSC is affiliated to them)	Indirect representation through CONCORDIA Confederation (as FPRC and ANRCR are affiliated to them)
ES	State Foundation for Training in Employment – Commerce’s Joint Committee	Tripartite	Law 30/2015 on the Regulation of the Training in Employment System	CIG; FeSMC-UGT; CCOO Servicios	AEFI; CEC; CEGAL; FEDIFAR; FEMPDA; FENPYD
SE	Swedish Retail and Wholesale Council	Bipartite	Agreement	AHT; Handels; Unionen	KFO; Svensk Handel

*Source: Network of Eurofound Correspondents’ national contributions to this study (2017–2018)*

### Reasons for fragmentation and pluralism in the commerce sector

Fragmentation is where different organisations cover different segments of the commerce sector. This makes those organisations complementary, as their membership domain does not overlap.

Pluralism on the other hand denotes a situation where organisations co-exist in the same (or very similar) segment(s), representing the same types of employees. This section provides an overview of the reasons for organisational fragmentation and pluralism in the sector.

Examples of trade union pluralism can be found in Belgium for example (with different national cross-sector affiliations to either the socialist (ABVV-FGTB), the Catholic (ACV-CSC) or the liberal (ACLVB-CGSLB) trade union federations. The pluralism in Spain with the ideologically different cross-sectoral federations UGT and CCOO is another example, with sectoral organisations affiliated to these different federations. Similar situations exist in Italy and France with affiliations to CGIL, CISL and UIL in Italy and CFDT, CGT and FO in France.

**Table 24: Reasons for fragmentation of trade unions**

Trade unions that only cover blue-collar or white-collar employees or a specific professional group of workers	Trade unions that do not cover the entire commerce sector, only some NACE codes (45, 46 or 47) within the commerce sector <sup>24</sup>	Trade unions that only cover some parts of the country	Trade unions that only cover some (types of) companies or occupations
<b>Blue-collar</b> (AT) PRO-GE (AT) vida (BE) ABVV-FGTB Horval (BE) ABVV-Metaal (BE) ACV-CSC (BE) ACV-CSC METEA (CZ) OSPO (DK) Dansk Metal (DK) Malerforbundet (FI) TEAM (FI) Teollisuusliitto (SE) Handels (SE) IF Metal  <b>White-collar</b> (AT) GPA-djp (AT) VAAÖ (BE) CNE (DK) HK (FI) ILRY (FI) PRO (FI) SFL (FI) SOA/ERTO (FR) CFDT-Cadres (FR) CFE-CGC Agroalimentaire (FR) CFE-CGC Métallurgie (FR) FNECS CFE-CGC (NL) VHP (SE) Unionen	<b>NACE 45 only</b> (AT) PRO-GE (BE) (ABVV-FGTB) MWB (BE) ABVV-Metaal (BE) ACV-CSC METEA (CY) OBIEK-SEK (CY) SEMMHK-PEO (DE) CGM (DE) IG Metall (DK) Dansk Metal (DK) Malerforbundet (ES) CCOO-Industria (FI) PRO (FI) TEAM (FI) Teollisuusliitto (FR) CFE-CGC Métallurgie (FR) CFTC Métallurgie (IT) FIM-CISL (IT) FIOM-CGIL (IT) UILM (LU) Garages LCGB- ASG (SE) IF Metall  <b>NACE 47 only</b> (AT) VAAÖ (ES) CIG Servizio (ES) ELA-Zerbitzuak (ES) FASGA (ES) FETICO (EL) Trade Union of Estee Lauder Employees (EL) Trade Union of Lidl Employees (HU) KDFSZ (LT) LKKDPS (LT) LPSDPS (LT) SAMPRO (NL) VHP	(BE) (ABVV-FGTB) MWB (BE) CNE (BE) LBC/NVK (ES) CIG Servizio (ES) ELA-Zerbitzuak	(AT) VAAÖ (DK) NNF (EL) Trade Union of Estee Lauder Employees (EL) Trade Union of Lidl Employees (ES) FASGA (FI) ILRY (FI) SFL (HU) KDFSZ (mainly Tesco and Spar employees) (NL) W.I.M. (IKEA only) (SE) Sveriges Farmaceuter

<sup>24</sup> Many of these trade unions also represent workers outside the commerce sector.

Trade unions that only cover blue-collar or white-collar employees or a specific professional group of workers	Trade unions that do not cover the entire commerce sector, only some NACE codes (45, 46 or 47) within the commerce sector <sup>24</sup>	Trade unions that only cover some parts of the country	Trade unions that only cover some (types of) companies or occupations
	(PL) FZZPSPHiU (SE) Sveriges Farmaceuter		

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

A specific aspect of fragmentation in the commerce sector relates to organisations (both on the employers and employee side) covering only the sectors of wholesale and retail trade and repair of motor vehicles and motorcycles (NACE 45) or the retail trade sector only (NACE 47).<sup>25</sup> Of the 113 trade unions identified in the commerce sector, 21 represent workers in NACE 45 (and beyond the commerce sector) but not in other aspects of the retail sector. As shown below, the same is also true for 22 of the 141 employer organisations in the commerce sector. Particularly on the trade union side, the occupational profile of members in organisations representing NACE 45 is rather distinct from that of members in NACE 47 (or 46), with mechanical and engineering (rather than commercial and consumer service) skills predominating. A number of trade unions only cover certain (types of) companies and occupations. For instance, 4 trade unions were identified that only (or mainly) organise workers in particular enterprises (see Table 25 below), whereas others largely organise specific occupations (e.g. pharmacists employed in pharmacies). A broader distinction between white-collar and blue-collar membership is also made in some organisations, whereas others only organise managerial staff.

**Table 25: Reasons for fragmentation of trade unions**

Country	Name	Reasons for fragmentation of trade unions				
		Employees outside the sector	Blue-collar and white-collar workers	The whole sector (all NACE codes)	All regions of the country	All occupations and companies <sup>26</sup>
AT	<b>GPA-djp</b>	Yes	No	Yes	Yes	Yes
AT	PRO-GE	Yes	No	No	Yes	No
AT	VAAÖ	No	No	No	Yes	No
AT	<b>vida</b>	Yes	No	Yes	Yes	No
BE	ABVV/FGTB Horval	Yes	No	Yes	Yes	No
BE	(ABVV-FGTB) MWB	Yes	Yes	No	No	No
BE	ABVV-Metaal	Yes	No	No	Yes	No
BE	<b>ACLVB/CGSLB</b>	Yes	Yes	Yes	Yes	Yes
BE	ACV-CSC METEA	Yes	No	Yes	Yes	No

<sup>25</sup> A significant number of organisations cover NACE 46 and 47 only, but these are not specifically mentioned here.

<sup>26</sup> Within their NACE sector and organisational remit (e.g. blue-collar or white-collar workers).

Country	Name	Reasons for fragmentation of trade unions				
		Employees outside the sector	Blue-collar and white-collar workers	The whole sector (all NACE codes)	All regions of the country	All occupations and companies <sup>26</sup>
BE	ACV-Voeding en Diensten, CSC-Alimentation et Services	Yes	No	Yes	Yes	Yes
BE	BBTK/SETCa	Yes	Yes	Yes	Yes	No
BE	CNE	Yes	No	Yes	No	Yes
BG	ITUFECCCTS	Yes	Yes	Yes	Yes	Yes
BE	LBC/NVK	Yes	Yes	Yes	No	Yes
BG	NFSCST Podkrepa Services Union	Yes	Yes	Yes	Yes	Yes
CY	OBIEK-SEK	Yes	Yes	No	Yes	Yes
CY	OIYK-SEK	Yes	Yes	Yes	Yes	Yes
CY	OMEPEGE-SEK	Yes	Yes	No	Yes	Yes
CY	SEBETTYK-PEO	Yes	Yes	No	Yes	Yes
CY	SEGDAMELIN-PEO	Yes	Yes	Yes	Yes	Yes
CY	SEMMHK-PEO	Yes	Yes	No	Yes	Yes
CZ	OSPO	Yes	No	Yes	Yes	Yes
DE	CGM	Yes	Yes	No	Yes	Yes
DE	DHV	Yes	Yes	Yes	Yes	Yes
DE	IG Metall	Yes	Yes	No	Yes	Yes
DE	ver.di	Yes	Yes	Yes	Yes	Yes
DK	Dansk Metal	Yes	No	No	Yes	Yes
DK	HK	Yes	No	Yes	Yes	Yes
DK	Malerforbundet	Yes	No	No	Yes	No
DK	NNF	Yes	Yes	Yes	Yes	Yes
DK	3F	Yes	Yes	Yes	Yes	Yes
EE	ESTAL	Yes	Yes	Yes	Yes	Yes
EE	ETKA	Yes	Yes	Yes	Yes	Yes
EL	OIYE	Yes	Yes	Yes	Yes	
EL	Trade Union of Estee Lauder Employees	No	Yes	No	Yes	No
EL	Trade Union of Lidl Employees	No	Yes	No	Yes	No
ES	CCOO-Industria	Yes	Yes	No	Yes	No
ES	CCOO-Servicios	Yes	Yes	Yes	Yes	Yes
ES	CIG Servizio	Yes	Yes	No	No	Yes
ES	ELA-Zerbitzuak	Yes	Yes	No	No	Yes

Country	Name	Reasons for fragmentation of trade unions				
		Employees outside the sector	Blue-collar and white-collar workers	The whole sector (all NACE codes)	All regions of the country	All occupations and companies <sup>26</sup>
ES	FASGA	No	Yes	No	Yes	Yes
ES	<b>FeSMC-UGT</b>	Yes	Yes	Yes	Yes	Yes
ES	FETICO	No	Yes	No	Yes	Yes
ES	<b>FICA-UGT</b>	Yes	Yes	Yes	Yes	Yes
ES	USO	Yes	Yes	Yes	Yes	Yes
FI	<b>ILRY</b>	Yes	No	Yes	Yes	No
FI	<b>PAM</b>	Yes	Yes	No	Yes	Yes
FI	PRO	Yes	No	No	Yes	Yes
FI	SFL	Yes	No	No	Yes	No
FI	SOA/ERTO	Yes	No	No	Yes	No
FI	TEAM	Yes	No	No	Yes	Yes
FI	Teollisuusliitto	Yes	No	No	Yes	Yes
FI	YTN	Yes	Yes	Yes	Yes	No
FR	CFE-CGC Agroalimentaire	Yes	No	No	Yes	No
FR	CFE-CGC Métallurgie	Yes	No	No	Yes	Yes
FR	<b>CFDT-Cadres</b>	Yes	No	Yes	Yes	No
FR	<b>CFDT-Services</b>	Yes	Yes	No	Yes	Yes
FR	<b>CGT Commerce</b>	Yes	Yes	No	Yes	Yes
FR	CFTC-CSFV	Yes	Yes	No	Yes	Yes
FR	CFTC Métallurgie	Yes	Yes	No	Yes	Yes
FR	<b>FEC-FO</b>	Yes	Yes	No	Yes	Yes
FR	FGA-CFDT	Yes	Yes	No	Yes	Yes
FR	FGMM-CFDT	Yes	Yes	No	Yes	Yes
FR	<b>FGTA-FO</b>	Yes	Yes	No	Yes	Yes
FR	FNAF-CGT	Yes	Yes	No	Yes	Yes
FR	FNECS CFE-CGC	Yes	No	No	Yes	Yes
FR	FO Métaux	Yes	Yes	No	Yes	Yes
FR	FTM-CGT	Yes	Yes	No	Yes	Yes
FR	UNSA	Yes	Yes	No	Yes	Yes
HR	<b>STH</b>	Yes	Yes	Yes	Yes	Yes
HU	<b>KASZ</b>	Yes	Yes	No	Yes	Yes
HU	KDFSZ	Yes	Yes	No	Yes	Yes
IE	<b>Mandate</b>	Yes	Yes	Yes	Yes	Yes

Country	Name	Reasons for fragmentation of trade unions				
		Employees outside the sector	Blue-collar and white-collar workers	The whole sector (all NACE codes)	All regions of the country	All occupations and companies <sup>26</sup>
IE	SIPTU	Yes	Yes	Yes	Yes	Yes
IT	<b>FILCAMS-CGIL</b>	Yes	Yes	Yes	Yes	Yes
IT	FIM-CISL	Yes	Yes	No	Yes	Yes
IT	FIOM-CGIL	Yes	Yes	No	Yes	Yes
IT	<b>FISASCAT-CISL</b>	Yes	Yes	Yes	Yes	Yes
IT	UILM	Yes	Yes	No	Yes	Yes
IT	<b>UILTuCS-UIL</b>	Yes	Yes	Yes	Yes	Yes
LT	<b>LKKDPS</b>	Yes	Yes	No	Yes	Yes
LT	<b>LPSDPS</b>	Yes	Yes	No	Yes	Yes
LT	SAMPRO	Yes	Yes	No	Yes	Yes
LU	Garages LCGB-ASG	No	Yes	No	Yes	Yes
LU	<b>LCGB commerce, food processing and catering</b>	Yes	Yes	No	Yes	Yes
LU	<b>OGBL</b>	No	Yes	Yes	Yes	Yes
LV	<b>LTDA</b>	Yes	Yes	Yes	Yes	Yes
MT	<b>GWU</b>	Yes	Yes	Yes	Yes	Yes
MT	UHM Voice of the Workers	Yes	Yes	Yes	Yes	Yes
NL	<b>CNV Vakmensen</b>	Yes	Yes	Yes	Yes	Yes
NL	<b>FNV</b>	Yes	Yes	Yes	Yes	Yes
NL	LBV	Yes	Yes	Yes	Yes	Yes
NL	VCP (formerly 'De Unie MHP')	Yes	Yes	Yes	Yes	Yes
NL	VHP	No	No	No	Yes	No
NL	W.I.M.	No	Yes	Yes	Yes	No
PL	FZZPSPHiU	Yes	Yes	No	Yes	No
PL	<b>NSZZ Solidarność</b>	No	Yes	Yes	Yes	Yes
PT	CESP	Yes	Yes	Yes	Yes	Yes
PT	<b>SITESE</b>	Yes	Yes	Yes	Yes	Yes
RO	<b>FSC</b>	No	Yes	Yes	Yes	Yes
SE	<b>AHT</b>	Yes	Yes	Yes	Yes	No
SE	Farmacieförbundet	Yes	Yes	No	Yes	No
SE	<b>Handels</b>	Yes	No	Yes	Yes	Yes
SE	IF Metall	Yes	No	No	Yes	Yes
SE	Lederana	Yes	Yes	Yes	Yes	No



Country	Name	Reasons for fragmentation of trade unions				
		Employees outside the sector	Blue-collar and white-collar workers	The whole sector (all NACE codes)	All regions of the country	All occupations and companies <sup>26</sup>
SE	Unionen	Yes	No	Yes	Yes	Yes
SI	SDTS	No	Yes	Yes	Yes	Yes
SI	SGS	Yes	Yes	Yes	Yes	Yes
SI	STS-KS 90	No	Yes	Yes	Yes	Yes
SK	<b>OZPOCR</b>	Yes	Yes	Yes	Yes	Yes
UK	<b>GMB</b>	Yes	Yes	No	Yes	Yes
UK	<b>Unite</b>	Yes	Yes	No	Yes	Yes
UK	<b>USDAW</b>	Yes	Yes	Yes	Yes	Yes

*Note: UNI Europa members are marked in bold*

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

In the commerce sector, fragmentation can be found among both trade unions and employer organisations. Indeed, fragmentation among employer organisations in the sector is particularly widespread in some countries where many employer organisations are present, representing different sub-sectors of the retail trade. This is particularly noticeable in France, Italy and Spain. Whilst there is an average of 4 trade unions in the commerce sector per Member State (113 divided by 28) there is an average of 5 employer organisations in the sector per Member State (150 divided by 28). The latter figure is significantly skewed by France, Italy and Spain, which between them have an average of 17.7 employer organisations each in the sector.

Table 26 below shows that the main reason for the fragmentation of interest representation on the employer side within the commerce sector overall is linked to the specificity of interest representation relating to different NACE sectors within the commerce sector (e.g. only retail, only wholesale, only wholesale and retail, only wholesale and retail of motor vehicles and motor cycles or indeed specific sub-sectors of the retail trade). Furthermore, other reasons for fragmentation are that some employer organisations focus only on large companies, and others only on SMEs or cooperatives. There is a slight preponderance of employer organisations that do not organise any businesses outside the sector. Of the 150 employer organisations, 30 cover the entire commerce sector, 24 organise employers only in NACE sector 45, 15 only have members in the retail sector (NACE 47) and 10 organisations only cover the wholesale trade (NACE 46), which the remainder covering a different subset of the commerce sector. Fragmentation of employer organisations in into different sub-sectors is most significant in France, Italy, the Netherlands and Spain.

Croatia, Lithuania, Malta and the UK are the only countries with only one employer organisation for the whole of the commerce sector.

**Table 26: Reasons for the fragmentation of employer organisations**

Country	Employer organisation	Reasons for fragmentation of employer organisations			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (NACE codes)	All regions of the country
AT	FGTS	Yes	Yes	No (47)	Yes
AT	ÖAV	No	Yes	No (47)	Yes
AT	<b>WKÖ BGA</b>	No	Yes	Yes	Yes
AT	<b>WKÖ BGHADP</b>	No	Yes	No (46, 47)	Yes
AT	WKÖ BIF	No	Yes	No (45)	Yes
AT	<b>WKÖ BSH</b>	No	Yes	Yes <sup>27</sup>	Yes
BG	<b>AMT</b>	No	Yes	No (46,47)	Yes
BE	<b>Comeos</b>	No	Yes	No (46, 47)	Yes
BE	FGBB	No	No (large bakeries)	No (46, 47)	Yes
BE	Grymafer	No	Yes	No (46)	Yes
BE	NUHOS/UNEBO	Yes	Yes	No (46, 47)	Yes
BE	OPHACO	Yes	Yes	No (46)	Yes
BE	Traxio	No	Yes	No (45)	Yes
BE	UCM	Yes	No (self-employed and SMEs)	No (45, 47)	Yes
BE	UNIZO	Yes	No (SMEs)	No (46, 47)	Yes
BG	UTB	n/d	Yes	Yes	Yes
CY	<b>KEBE</b>	Yes	Yes	Yes	Yes
CY	SEMO	Yes	No	No (45)	Yes
CZ	AČTO	Yes	Yes	No (46, 47)	Yes
CZ	APEK	Yes	Yes	No (46, 47)	Yes
CZ	<b>SOČR ČR</b>	Yes	Yes	Yes	Yes
DE	<b>BGA</b>	Yes	Yes	Yes	Yes
DE	<b>HDE</b>	No	Yes	Yes	Yes
DE	ZDK	No	Yes	No (45)	Yes
DK	ABAF	No	Yes	No (45)	Yes
DK	BA	No	No (Cooperatives)	No (46)	Yes

<sup>27</sup> Except pharmacies

Country	Employer organisation	Reasons for fragmentation of employer organisations			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (NACE codes)	All regions of the country
DK	<b>Dansk Erhverv</b>	Yes	Yes	Yes	Yes
DK	DI	Yes	Yes	Yes	Yes
DK	SKAD	No	Yes	No (45)	Yes
EE	EEL	Yes	Yes	No (46, 47)	Yes
EE	<b>EKL</b>	Yes	Yes	Yes	Yes
EE	EKTK	Yes	Yes	Yes	Yes
EL	<b>ESEE</b>	Yes	Yes	Yes	Yes
EL	GSEVEE	Yes	Yes	Yes	Yes
EL	SELPE	Yes	No (SMEs)	No (47)	Yes
ES	<b>ACES</b>	No	Yes	No (46, 47)	Yes
ES	AECQ	No	Yes	No (46)	Yes
ES	AEFI	No	Yes	No (47)	Yes
ES	AEVECAR	No	No (petrol stations only)	No (47)	Yes
ES	AGES	No	No (petrol stations only)	No (47)	Yes
ES	<b>ANGED</b>	No	No (large only)	No (46, 47)	Yes
ES	<b>ASEDAS</b>	No	Yes	No (46, 47)	Yes
ES	CEC	No	No (SMEs)	No (47)	Yes
ES	CEEES	Yes	Yes	No (47)	Yes
ES	CEGAL	No	Yes	No (47)	Yes
ES	FANDE	No	No (book wholesalers)	No (46)	Yes
ES	FEDEQUIM	Yes	Yes	No (46)	Yes
ES	FEDIFAR	Yes	Yes	No (46)	Yes
ES	FENPYD	Yes	Yes	No (47)	Yes
ES	La Única	No	Yes	No 46, 47)	No
FI	AKL	No	Yes	No (45)	Yes
FI	APTA	No	No (pharmacies only)	No (47)	Yes
FI	ARL	Yes	Yes	No (45)	Yes
FI	ETU	No	Yes	Yes	Yes

Country	Employer organisation	Reasons for fragmentation of employer organisations			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (NACE codes)	All regions of the country
FI	<b>Kauppa</b>	No	Yes	No (46, 47)	Yes
FR	<b>CDCF</b>	No	Yes	No (47)	Yes
FR	<b>CDNA</b>	No	Yes	No (46, 47)	Yes
FR	CGAD	Yes	Yes	No (47)	Yes
FR	CGI	No	Yes	No (46)	Yes
FR	CNPA	Yes	Yes	No (45)	Yes
FR	FCD	No	Yes	No (46, 47)	Yes
FR	FEC	No	Yes	No (47)	Yes
FR	<b>Fédération de l'Horlogerie</b>	No	Yes	No (46, 47)	Yes
FR	<b>FEH</b>	No	Yes	No (47)	Yes
FR	FFC	Yes	Yes	No (45)	Yes
FR	<b>FFQ</b>	No	Yes	No (47)	Yes
FR	<b>FICIME</b>	Yes	Yes	No (46)	Yes
FR	<b>FMB</b>	No	Yes	No (47)	Yes
FR	FNAA	No	Yes	No (45)	Yes
FR	<b>FNH</b>	No	Yes	No (47)	Yes
FR	<b>FNMJ</b>	No	Yes	No (47)	Yes
FR	<b>FNP</b>	No	Yes	No (47)	Yes
FR	GNEA	Yes	Yes	No (45)	Yes
FR	Les Professionnels du Pneu	Yes	Yes	No (45, 46)	Yes
FR	<b>SNOR</b>	No	Yes	No (47)	Yes
FR	UBH	No	Yes	No (47)	Yes
FR	UCV	No	Yes	No (47)	Yes
FR	<b>UDO</b>	No	Yes	No (47)	Yes
FR	<b>UFIP</b>	No	Yes	No (46, 47)	Yes
FR	<b>Union Sport et Cycle</b>	Yes	Yes	No (47)	Yes
FR	<b>UPECAD</b>	No	Yes	No (47)	Yes
HR	<b>HUP-Udruga trgovine</b>	No	No (large only)	Yes	Yes
HU	ÁFEOSZ	No	Yes	No (47,46)	Yes
HU	KISOSZ	No	No ) SMEs	No (47)	Yes
HU	<b>MNKSZ</b>	No information available			

Country	Employer organisation	Reasons for fragmentation of employer organisations			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (NACE codes)	All regions of the country
HU	<b>OKSZ</b>	No	No mainly the Multinational companies	Yes	Yes
HU	<b>VOSZ</b>	Yes	Yes	Yes	Yes
IE	<b>IBEC Retail Ireland</b>	No	Yes	No (46, 47)	Yes
IE	ISME	Yes	Yes	No	Yes
IE	RGDATA	Yes	No (SMEs)	n/d	Yes
IT	AGCI	Yes	No (cooperatives)	Yes	Yes
IT	ANCC-COOP	No	No (cooperatives)	No (46, 47)	Yes
IT	ANCD CONAD	No	No (cooperatives)	No (46, 47)	Yes
IT	Casartigiani	Yes	No (SMEs)	No (46, 47)	Yes
IT	CLAAI	Yes	No (SMEs)	No (45)	Yes
IT	CNA	Yes	No (SMEs)	No (45)	Yes
IT	Confartigianato	Yes	Yes	No (45)	Yes
IT	<b>Confcommercio</b>	Yes	Yes	Yes	Yes
IT	Confesercenti	Yes	Yes	Yes	Yes
IT	Federconsumo	Yes	No (cooperatives)	No (46, 47)	Yes
IT	<b>Federdistribuzione</b>	No	Yes	No (46, 47)	Yes
LT	LPIA	Yes	Yes	Yes	Yes
LU	<b>ADAL</b>	No	Yes	No (45)	Yes
LU	CLC	Yes	Yes	Yes	Yes
LU	<b>FDA</b>	Yes	Yes	Yes	Yes
LU	FEGARLUX	No	Yes	No (45)	Yes
LV	<b>LPTA</b>	No	Yes	No (46, 47)	Yes
LV	<b>LTA</b>	Yes	Yes	No (46, 47)	Yes
MT	<b>GRTU</b>	Yes	No (SMEs)	Yes	Yes
NL	BOVAG	Yes	Yes	No (45)	Yes
NL	<b>CBL</b>	No	Yes	No (46, 47)	Yes
NL	Dibevo	Yes	Yes	No (46,	Yes

Country	Employer organisation	Reasons for fragmentation of employer organisations			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (NACE codes)	All regions of the country
				47)	
NL	<b>Inretail</b>	No	Yes	No (47)	Yes
NL	<b>MKB-Nederland</b>	Yes	No (SMEs)	Yes	Yes
NL	NVCW	Yes	Yes	No (47)	Yes
NL	<b>RND</b>	Yes	Yes	No (47)	Yes
NL	<b>Vakcentrum</b>	No	No (SMEs)	No (47)	Yes
NL	<b>VGT</b>	No	Yes	No (47)	Yes
NL	VWDHZ	No	Yes	No (47)	Yes
NL	<b>WTG</b>	No	Yes	No (46)	Yes
PL	FPH	No	Yes	Yes	Yes
PL	PIH	Yes	Yes	Yes	Yes
PL	<b>POHiD</b>	No	Yes	Yes	Yes
PT	ACAP	Yes	Yes	No (45)	Yes
PT	<b>ACB</b>	Yes	Yes	No (47)	No
PT	<b>ACPorto</b>	No	Yes	No (46, 47)	No
PT	<b>ADIPA</b>	Yes	Yes	No (46, 47)	Yes
PT	ANECRA	No	Yes	No (45)	Yes
PT	<b>APED</b>	No	No (only medium and large)	Yes	Yes
PT	ARAN	n/d	Yes	No (45)	Yes
PT	<b>CCP</b>	Yes	Yes	Yes	Yes
RO	<b>AMRCR</b>	No	No (only large)	No (47)	Yes
RO	<b>FRPC</b>	No	Yes	No (46, 47)	Yes
SE	Almega	Yes	Yes	No (46)	Yes
SE	KFO	Yes	No (cooperatives)	No (46, 47)	Yes
SE	Livsmedelsföretagen	Yes	Yes	No (46, 47)	Yes
SE	MAF	No	Yes	No (45)	Yes
SE	<b>Svensk Dagligvaruhandel</b>	No	Yes	No (46, 47)	Yes
SE	<b>Svensk Handel</b>	No	Yes	Yes	Yes
SE	TeknikGrossisternas Arbetsgivareförening	No	Yes	No (45, 46)	Yes

Country	Employer organisation	Reasons for fragmentation of employer organisations			
		Companies/business activities outside the sector	All legal forms/size classes	The whole sector (NACE codes)	All regions of the country
SI	OZS	Yes	No (only small)	Yes	Yes
SI	PTZ	Yes	Yes	Yes	Yes
SI	<b>TZSLO</b>	Yes	Yes	Yes	Yes
SI	ZDS	Yes	Yes	Yes	Yes
SK	<b>COOP Jednota</b>	No	Yes	No (46, 47)	Yes
SK	<b>SAMO</b>	No	Yes	No (47)	Yes
SK	<b>ZOCR SR</b>	Yes	Yes	No (46, 47)	Yes
UK	<b>BRC</b>	No	Yes	No (47)	Yes

*Note: Members of EuroCommerce are marked in bold*

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

### 3. European level of interest representation

In this chapter, the representativeness of the social partners at European level is assessed in three ways. Firstly, the membership strength of both UNI Europa and EuroCommerce is described, based on the collective coverage of their national affiliates in each of the Member States.

Secondly, the ‘capacity to negotiate’ of the European social partners is analysed; this is 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. This capacity to negotiate is affected by the involvement of their affiliates in collective bargaining at national level which not only ensures they can provide an effective mandate for discussion and negotiation at European level, but also that they are in a position to implement European-level agreements.

Finally, every representativeness study also measures the limits of the representativeness of social partners involved in European sectoral social dialogue, by counterweighting with the representativeness of other European associations and the national organisations not represented by UNI Europa and EuroCommerce in the European sectoral social dialogue committee for the commerce sector.

As outlined in greater detail below, the study presents detailed data on two sector-related European associations – namely UNI Europa on the employee side and EuroCommerce on the employer side. Both are listed by the Commission as a social partner organisation to be consulted under Article 154 of the TFEU. Supplementary information will be provided for other organisations (potentially) involved in social dialogue in the sector, where this information has become available in the course of the study.

#### Membership domain: UNI Europa

UNI Europa is affiliated to the European Trade Union Confederation (ETUC) at cross-sector level. Through its national affiliates, UNI Europa covers all relevant commerce sector NACE codes (45, 46 and 47). With regard to the overall organisation, UNI Europa covers a wide range of service sectors. Besides its involvement in the European sectoral social dialogue committee for the commerce sector, it also operates in the European sectoral social dialogue committee for the following sectors:

- Audio-visual
- Banking
- Industrial cleaning
- Insurance
- Live performance
- Personal services
- Post and logistics
- Private security
- Sports
- Temporary and agency workers

As such, the membership domain of UNI Europa as a whole is multi-sectoral and therefore overlaps the commerce under consideration in this report.

In the statutes of UNI Europa, membership is defined in Article 4, which states that membership of UNI Europa is open to all members of national trade union centres affiliated to ETUC that fall within its jurisdiction. The Regional Executive Committee makes recommendations to the UNI World Executive Board regarding affiliation of new organisations.

Of the 113 national commerce sector trade unions, there are 51 (45%) that are affiliated to UNI Europa. In 26 out of 28 Member States, there is a trade union/are trade unions affiliated to UNI Europa. Bulgaria and Slovenia are the only countries without trade unions in the sector affiliated to UNI Europa. In Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Romania, Slovakia and the UK, all unions representing workers in the sector are affiliated to UNI Europa. In the remaining countries, some but not all sectoral unions are members of UNI Europa. With the exception of Bulgaria and Slovenia, in all other Member States, the trade unions with the most members in the sector (based on the data available) are members of UNI Europa.



**Table 27: Sector-related trade unions affiliated to UNI Europa**

Country	Trade unions affiliated to UNI Europa	Trade unions not affiliated to UNI Europa	Is the trade union with most members in the sector affiliated?
AT	GPA-djp, vida	PRO-GE, VAAÖ	Yes
BE	ACLVB/CGSLB, ACV-Voeding and Diensten/CSC-Alimentation et Services, BBTK/SETCa, CNE, LBC/NVK	ABVV/FGTB Horval, ABVV-Metaal, (ABVV-FGTB) MWB, ACV-CSC METEA,	Yes
BG	None	ITUFECCCTCS, NFSCSCT Podkrepa Services Union	No
CY	OBIEK-SEK, OIYK-SEK	OMEPEGE-SEK, SEGDAMELIN-PEO, SEMMHK-PEO	Yes
CZ	OSPO		Yes
DE	ver.di	CGM, DHV, IG Metall	Yes
DK	HK, NNF, 3F	Dansk Metall, Malerforbundet	Yes
EE	ESTAL, ETKA		Yes
EL	OIYE	Trade Union of Estee Lauder Employees, Trade Union of Lidl Employees	Yes
ES	FeSMC-UGT, CCOO-Servicios, ELA-Zerbitzuak	CCOO-Industria, FETICO, FASGA, USO, CIG Servizio	Yes
FI	PAM, ILRY	TEAM, Teollisuusliitto, RO, SFL, SOA/ERTO, YTN	Yes
FR	CFDT, CFDT-Cadres, CGT-Commerce, FEC-FO, FGTA-FO	CFE-CGC Agroalimentaire, CFE-CGC Métallurgie, CFTC Métallurgie, FGA-CFDT, FGMM-CFTD, FNAF-CGT, FO Métaux, FTM-CGT, UNSA	Yes
HR	STH		Yes
HU	KASZ	KDFSZ	Yes
IE	Mandate	SIPTU	Yes
IT	FILCAMS-CGIL, FISASCAT-CISL, UILTuCS-UIL	FIM-CISL, FIOM-CGIL, UILM	Yes
LT	LKKDPS, LPSDPS		Yes
LU	LCGB commerce, food processing and catering; OGBL	Garages LCGB-ASG	Yes
LV	LTDA		Yes
MT	GWU	UHM Voice of the Workers	Yes
NL	CNV Vakmensen, FNV	LBV, VCP (formerly 'De Unie MHP'), VHP, W.I.M.	Yes
PL	NSZZ Solidarność	FZZPSPHiU	Yes

Country	Trade unions affiliated to UNI Europa	Trade unions not affiliated to UNI Europa	Is the trade union with most members in the sector affiliated?
PT	SITESE	CESP	n/d
RO	FSC		Yes
SE	AHT, Handels, Unionen	IF Metall, Ledernana, Sveriges Farmaceuter	Yes
SI	None	SDTS, SGS, STS-KS 90	No
SK	OZPOCR		Yes
UK	GMB, Unite, USDAW		Yes

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

As demonstrated in Table 11 above, in 26 Member States, UNI Europa has at least one affiliate covering the entire commerce sector (all NACE codes). In Finland and Lithuania, the members of UNI Europa only cover the retail sector (indeed, there are no trade unions covering the other sectors).

For the majority of UNI Europa members the domain pattern is one of sectional overlap (39 organisations). While a number of these unions cover all sectors (NACE 45, 46, 47) a number only cover certain regions or only blue-collar or white-collar workers. A further 10 organisations have an overlapping domain – covering workers in the sector as well as beyond whereas 3 are fully congruent.

As shown in Table 14, of the 107 trade unions in the commerce sector for which there is data, 105 are involved in collective bargaining. The two unions that are not involved (one in France and one in Lithuania) are members of UNI Europa, but in these countries there are other members of UNI Europa that do participate in collective bargaining. Of those that are involved in collective bargaining, 50% are members of UNI Europa. As these are the unions with the largest membership, their collective bargaining coverage also tends to be the highest. The majority of these (38 out of 53) are involved in multi-employer collective bargaining. In Croatia, the Czech Republic, Estonia, Greece, Romania and Slovenia, all trade unions involved in collective bargaining in the sector are affiliated to UNI Europa. In the other Member States (with the exception of Bulgaria and Slovenia), some of the trade unions involved in collective bargaining are members of UNI Europa, but not all of them.

As demonstrated in Table 14, member unions of UNI Europa are among those achieving the highest coverage by collective bargaining in the sector in the vast majority of EU countries. Insufficient data is available in France, Greece, Italy, Lithuania and Poland to make this assessment. In Bulgaria and Slovenia, UNI Europa does not have any members. In all other 26 Member States, UNI Europa has a member organisation involved in collective bargaining.

## Membership domain: EuroCommerce

EuroCommerce only aims to represent its members for their activities in wholesale (NACE 46) and retail (NACE 47), not in vehicle-related commerce activities (NACE 45). Through its national member organisations, EuroCommerce covers a membership domain that is more or less congruent to the commerce sector as defined by NACE codes 45, 46 and 47. Therefore, EuroCommerce is only involved in the European sectoral social dialogue committee for the commerce sector.

Article 4 of the statutes of EuroCommerce provides for three different membership categories: national association members, company members and affiliated members. All members are listed in Tables 50 and 51 in Annex 1. Members must have legal personality and must be validly incorporated under the laws and customs of their country of origin. Similar requirements apply to each type of (potential) member.

- National association members need to be representative of one or several of the sectors referred to in Article 3 in the countries that are members of the EU, EFTA or the EU Customs Union.
- Company members should represent companies or groups of companies involved in one or several of the sectors referred to in Article 3.

- Affiliated members need to be European, international or national associations from one or several of the sectors (or sub-sectors) referred to in Article 3.

National associations are national employer organisations and business associations representing employers in the commerce sector. Affiliated members can be European or international associations in the sector (with the exception of three organisations they are European/international associations) and company members are individual commerce sector companies. In terms of the statutes of EuroCommerce, the difference is that only national members have voting rights in the General Assembly.

The Board of Directors votes on the applications of candidate members, and members are selected based on a simple majority of the votes cast.

Of the 150 employer organisations in the commerce sector (for 2 organisations this information was not available), 68 (45%) are members of EuroCommerce. However, EuroCommerce has at least one member organisation in each Member State, with the exception of Lithuania<sup>28</sup>. The existence of affiliate or company members has limited impact in terms of country coverage, as one of the company members of EuroCommerce has a joint venture in Lithuania. However, as no collective bargaining takes place in this organisation, it does not add to representativeness in terms of collective bargaining coverage.

In Bulgaria, Croatia, Ireland, Latvia, Malta, Romania and Slovakia, all existing employer organisations in the sector are members of EuroCommerce (in Malta there is only one employer organisation in the sector). In the remaining countries, EuroCommerce has a member organisation, but not all commerce employer organisations are members of EuroCommerce.

**Table 28: Sector-related employer organisations affiliated to EuroCommerce**

Country	Employer organisations affiliated to EuroCommerce	Employer organisations not affiliated to EuroCommerce	Is the largest employer organisation member of EuroCommerce (based on number of employees in member companies)	Is the largest employer in the sector a member of the EuroCommerce affiliate
AT	WKÖ BGA, WKÖ BGHADP, , WKÖ BSH	FGTS, ÖAV, WKÖ BIF	Yes	Yes
BE	Comeos	FGBB, Grymafer, NUHOS/UNEBO, OPHACO, Traxio, UCM, UNIZO	n/d	Yes
BG	AMT		Yes	Yes
CY	KEBE	SEMO	Yes	Yes
CZ	SOCR ČR	AČTO, APEK	Yes	Yes
DE	BGA, HDE	ZDK	Yes	Yes
DK	Dansk Erhverv	ABAF, BA, DI, SKAD	Yes	Yes
EE	EKL	AMTEL, EEL, EKTK	No	Yes
EL	ESEE, SELPE	GSEVEE	Yes	Yes
ES	ACES, ANGED, ASEDAS	ABECAR, AECQ, AEFI, AGES, CEC, CEES, CEGAL, FANDE,	Insufficient data	Yes

<sup>28</sup> One of the Finnish company members of EuroCommerce operates a joint venture in Lithuania (Kesko Senukai Lithuania), which employs around 3,550 workers in Lithuania. However, no collective bargaining takes place in this company.

Country	Employer organisations affiliated to EuroCommerce	Employer organisations not affiliated to EuroCommerce	Is the largest employer organisation member of EuroCommerce (based on number of employees in member companies)	Is the largest employer in the sector a member of the EuroCommerce affiliate
		FEDEQUIM, FEIFAR, FENPYD, La Única		
FI	Kauppa, <i>ETU</i>	AKL, APTA, ARL,	Yes	Yes
FR	CDCF, CDNA, CGI, FCD, Fédération de l'Horlogerie, FEH, FFQ, FICIME, FMB, FNH, FNMJ, FNP, SNOR, UDO, UFIP, Union Sport et Cycle, UPECAD	CGAD, CNPA, FEC, FFC, FNAA, UBH, UCV	Insufficient data	Yes
HR	HGK, HUP-Udruga trgovine		Yes	Yes
HU	OKSZ, VOSZ	ÁFEOSZ, KISOSZ, MNKSZ	Yes	Yes
IE	Retail Ireland	ISME, RDATA	Yes	Yes
IT	Confcommercio, Federdistribuzione	ANCC-COOP, ANCD CONAD, AGCI, Casartigiani, Confartigianato, Confesercenti, CLAAI, CNA, Federconsumo		No
LT		LPIA	No	No
LU	ADAL, CLC	FDA, FEGARLUX	Yes	Yes
LV	LPTA, LTA		Yes	Yes
MT	GRTU		Yes	Yes
NL	<i>CBL</i> , Inretail, MKB-Nederland, RND, Vakcentrum, VGT, VWDHZ, WTG	BOVAG, Dibevo, NVCW	Yes	Yes
PL	POHiD	FPH, PIH	Yes	Yes
PT	ACB, ACPorto, ADIPA, APED, CCP <sup>29</sup>	ACAP, ANECRA	Yes	Yes
RO	AMRCR, FRPC		Yes	Yes
SE	<i>Svensk Dagligvaruhandel</i> , Svensk Handel	Almega, KFO, Livsmedelsföretagen, MAF, TeknikGrossisternas Arbetsgivareförening	Yes	Yes
SI	TZSLO	OZS, PTZ, ZDS	Yes	Yes

<sup>29</sup> EuroCommerce has ACB, ACPorto, ADIPA, APED and CCP as members in Portugal and together they are fully representative for the entire commerce sector in Portugal

Country	Employer organisations affiliated to EuroCommerce	Employer organisations not affiliated to EuroCommerce	Is the largest employer organisation member of EuroCommerce (based on number of employees in member companies)	Is the largest employer in the sector a member of the EuroCommerce affiliate
SK	COOP Jednota, SAMO, ZOČR SR		Yes	Yes
UK	BRC		Yes	Yes

*Note: National affiliated members are marked in italics*

*Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

Among the organisations mentioned in the table above, ETU (Finland), CBL (the Netherlands) and Svensk Dagligvaruhandel (Sweden) are affiliate members of EuroCommerce. The other affiliate members of EuroCommerce (at EU level) are:

- Direct Selling Europe
- Ecommerce Europe
- EDRA (European DIY Retail Association)
- EMOTA (European eCommerce & Omni-Channel Trade Association)
- ETRC (European Travel Retail Council)
- EUEW (European Union of Electric Wholesalers)
- FECC (European Association of Chemical Distributors)
- Seldia (European Direct Selling Association)

In addition, EuroCommerce has company members. These companies and their contribution to the collective bargaining coverage of EuroCommerce members in the Member States are presented in Table 51 in Annex 1. As indicated in Table 15, in 16 Member States, EuroCommerce has members covering the entire commerce sector (Austria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Germany, Greece, Hungary, Italy, Luxembourg, Malta, Poland, Portugal, Slovenia and Sweden). In 10 Member States, EuroCommerce members do not cover the entire commerce sector (all commerce sector NACE Codes) Belgium, Bulgaria, France, Finland, Ireland, the Netherlands, Romania, SlovakiaSpain, and the UK). It is therefore only in Bulgaria where EuroCommerce does not have members covering all the NACE codes making up the commerce sector (the member of EuroCommerce does not cover NACE 45). While the affiliate members of EuroCommerce do not significantly add to the organisation's collective bargaining coverage, the fact that collective bargaining takes place in a number of the company members of EuroCommerce in the UK expands the coverage of EuroCommerce member organisations involved in collective bargaining; particularly as the national member of EuroCommerce in the UK is not involved in collective bargaining.

If one were to look solely at the wholesale (NACE 46) and retail (NACE 47) sectors, 22 employer organisations identified can be excluded from the assessment, as they only have members in NACE 45. Of the remaining 128 employer organisations, 67 (52%) in 27 Member States are affiliated to EuroCommerce. The table below provides a more detailed picture of employer organisations in different NACE codes, detailing their involvement in collective bargaining and membership of EuroCommerce.

**Table 29: Sector-related employer organisations affiliated to EuroCommerce**

	<b>NACE 45</b>	<b>NACE 46</b>	<b>NACE 47</b>
<b>Number of sector-related employer organisations</b>	22 representing NACE 45 only 40 representing NACE 45 and other commerce-related NACE codes	87 (most with combined membership)	128 (most with combined membership)
<b>Number of sector-related employer organisations affiliated to EuroCommerce</b>	1 only representing NACE 45 <sup>30</sup> 21 with combined membership	46 (most with combined membership)	63 (most with combined membership)
<b>% of sector-related employer organisations affiliated to EuroCommerce</b>	5% only in NACE 45 52% with combined membership (33% overall)	53%	49%
<b>Number of employer organisations involved in sector-related collective bargaining</b>	21 with combined membership (none with solely NACE 45 membership)	51	85
<b>Number of these affiliated to EuroCommerce</b>	11	29	44
<b>%</b>	52%	57%	52%

*Note: National affiliated members are marked in italics*

*Source: Own calculations based on Network of Eurofound Correspondents' national contributions to this study (2017–2018)*

In terms of domain coverage: 6 member organisations of EuroCommerce have a congruent coverage (in Croatia, Germany, Slovakia and the UK); 9 display an overlapping coverage (in Cyprus, Czech Republic, Denmark, Estonia, Italy and Lithuania); 59 only organise employers in part of the sector and not outside the commerce sector (Austria, Belgium, Bulgaria, Finland, France, Ireland, Italy, Latvia, Luxembourg, the Netherlands, Poland, Portugal, Romania, Slovakia and Spain); and 65 only cover part of the sector as well as having membership among employer organisations outside the commerce sector (Croatia, France, Germany, Greece, Hungary, Latvia, Luxembourg, Malta, Portugal, Slovakia and Slovenia).

Overall, there are 111 employer organisations involved in collective bargaining, of which 47 are members of EuroCommerce. As demonstrated in Table 18, of the 56 EuroCommerce member organisations where this information is available, 79% (44 organisations) are involved in multi-employer collective bargaining (Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, the Netherlands, Portugal, Slovakia, Slovenia, Spain, Sweden). A further 7% (4 organisations) are involved in single-employer bargaining (Croatia, Ireland, Lithuania) and 14 (25%) member organisations in 12 countries (Austria, Bulgaria, Cyprus, Estonia, Spain, France, Hungary, Luxembourg, Lithuania, Malta, Poland, Romania, the UK) are not involved in collective bargaining. This means that in Bulgaria, Cyprus, Estonia, Hungary, Lithuania, Malta, Poland, Romania and the UK, EuroCommerce does not have any national association members that are directly involved in collective bargaining (as indicated above, collective agreements are still agreed at company level in some companies in these countries, but these agreements are negotiated without the involvement of the employer organisation).

It is also worth noting that in Estonia, Hungary, Lithuania, Malta, Poland, Romania and the UK, there are no employer organisations in the sector involved in collective bargaining. By observing the largest commerce sector employers in those countries (in Table 45 in Annex 1), it can be concluded that there is company-level collective bargaining in some companies, for instance Prisma Peremarket (Estonia), Spar (Hungary), Rimi Lietuva (Lithuania), The General Soft Drinks Co (Malta), Farsons (Malta), Tesco (UK), Asda (UK) and Sainsbury's (UK). In addition, there are company-level agreements in at least two large employers in direct membership of EuroCommerce in the UK, which add to the representativeness of the organisation; Tesco

<sup>30</sup> ADAL in Luxembourg is a member by virtue of its membership of CLC.

and Kingfisher. It should be noted that beyond this, membership involvement in collective bargaining in other Member States was not added through the corporate members included in Table 51 in Annex 1.

In Austria, the Czech Republic, Denmark, Finland, Germany, Italy, Latvia, the Netherlands, Portugal, Slovakia, Slovenia and Sweden, the collective agreements negotiated by EuroCommerce members are those covering the greatest number of workers in the sector.

EuroCommerce also has corporate members in Belgium, Germany, France, Finland, the Netherlands, Portugal, Spain, Sweden and the UK. Most of these are multinational companies (see Table 51 in Annex 1). Of these member companies, 23 are involved in collective bargaining (for the remaining organisations no data is available), which is particularly significant for the UK, where the national employer organisation does not sign collective agreements.

### Commerce sector representativeness of UNI Europa and EuroCommerce

The table below summarises the representativeness of both UNI Europa and EuroCommerce in the commerce sector with their respective affiliated trade unions and employer organisations. There are 113 commerce sector trade unions in 28 Member States, of which 51 trade unions (45%) from 26 Member States are members of UNI Europa (there are no members in Bulgaria and Slovenia). Of the 105 commerce sector trade unions for which information is available and which are involved in collective bargaining, 50% are affiliated to UNI Europa. UNI Europa has members involved in collective bargaining in all Member States (with the exception of Bulgaria and Slovenia where there are no members).

There are 150 employer organisations in the commerce sector in 28 countries. Of the 148 employer organisations for which this information is available, 68 are members of EuroCommerce. However, EuroCommerce has at least one member organisation in each Member State, with the exception of Lithuania.

Of the 56 EuroCommerce member organisations where this information is available, 84% are involved in collective bargaining. When considering the 111 employer organisations in the sector for which data on collective bargaining involvement is available, 42% are affiliated to EuroCommerce. Employer organisations in the commerce sector are directly involved in collective bargaining in only 57% of Member States.

**Table 30: Membership structure of UNI Europa and EuroCommerce**

	Number of organisations	Number of Member States with organisations	Number of organisations involved in collective bargaining	Number of Member States with organisation(s) involved in collective bargaining
<b>All sector-related trade unions</b>	113	28	105	28
<b>Affiliates of UNI Europa</b>	51	26	53	26
<b>% affiliated</b>	45%	93%	50%	93%
<b>All sector-related employer organisations</b>	150	28	111	20
<b>Employer organisations affiliated to EuroCommerce (national members and affiliated members)</b>	68	27	47	16
<b>% affiliated</b>	45%	96%	42%	57%
<b>EuroCommerce company members</b>	31	8	23 <sup>31</sup>	8

Source: Calculated on the basis of information provided by the Network of Eurofound Correspondents

<sup>31</sup> No data is available for eight company members.

The table above only presents a general overall picture of the representativeness of UNI Europa and EuroCommerce members. Table 31 provides further details on a country-by-country basis, demonstrating the importance of UNI Europa and EuroCommerce members in terms of their coverage of employees in the sector and involvement in collective bargaining.

This demonstrates that, with the exception of the countries where UNI Europa and EuroCommerce are not represented, the national representativeness of the member organisations of UNI Europa and EuroCommerce is high. It must be noted that in a number of countries, albeit being the largest employer organisations, some members of EuroCommerce are not involved in collective bargaining at the national level (e.g. Bulgaria, Cyprus, Estonia, Hungary, Lithuania, Malta, Poland, Romania and the UK).

**Table 31: Importance of UNI Europa and EuroCommerce members at national level**

	Most representative trade union(s)	Sector coverage	Involved in CB	Member of UNI Europa	Most representative employer organisation	Sector coverage	Involved in CB	Member of EuroCommerce
AT	GPA-djp	All	Yes	Yes	WKÖ BSH	Almost all <sup>32</sup>	Yes	Yes
BE	ABVV-FGTB, ACLVB-CGSLB, ACV-CSC	45 All 46, 47	Yes Yes Yes	No Yes Yes	Comeos UCM UNIZO	46, 47 45, 47 45, 47	Yes Yes Yes	Yes No No
BG	ITUFECCS	All	Yes	No	AMT	46, 47	n/d	Yes
CY	OIYK-SEK	46, 47	Yes	Yes	SEMO <sup>33</sup>	45	Yes	No
CZ	OSPO	46, 47	Yes	Yes	SOCR ČR	All	Yes	Yes
DE	DHV, <sup>34</sup> ver.di	n/d All	Yes Yes	No Yes	HDE	All	Yes	Yes
DK	HK Handel, 3F	All All	Yes	Yes	Dansk Erhverv DI	All All	Yes Yes	Yes No
EE	ETKA	All	Yes	Yes	EKL	All	No	Yes
EL	OIYE	All	Yes	Yes	ESEE GSEVEE	All All	Yes Yes	Yes No
FI	PAM	46, 47	Yes	Yes	Kauppa	46, 47	Yes	Yes
FR	CFDT-Services, CGT Commerce, FEC-FO, FGTA-FO <sup>35</sup>	46, 47 46, 47 46, 47 46, 47	Yes	Yes	Due to the segmentation in the sector, this is difficult to assess, but EuroCommerce is considered representative in France.	Various	Yes	20 are affiliated to EuroCommerce

<sup>32</sup> Except pharmacies.

<sup>33</sup> The EuroCommerce member, KEBE, is the larger organisation and covers the whole sector, but is not involved in collective bargaining.

<sup>34</sup> There is rivalry between DHV and ver.di and ongoing litigation.

<sup>35</sup> These are the largest unions in the sector. There are other unions, mainly active in NACE 45, which are affiliated to IndustriALL.



HU	KASZ	46, 47	Yes	Yes	OKSZ	All	No	Yes
HR	STH	All	Yes	Yes	HUP-Udruga trgovine	All	Yes	Yes
IE	Mandate	All	Yes	Yes	IBEC Retail Ireland	46, 47	Yes	Yes
IT					ANCC ANCD AGCI Confcommercio , Confesercenti, Federdistribuzione	46, 47 46, 47 All All All 46, 47	Yes Yes Yes Yes Yes Yes	No No No Yes No Yes
LU	LCGB, OGBL	46, 47 All	Yes	Yes	CLC	All	No	Yes
LT	LPSDPD, SAMPRO	47 47	Yes Yes	Yes n/d	LPIA	All	No	n/d
LV	LTDA	46, 47	Yes	Yes	LTA	46, 47	Yes	Yes
MT	GWU	All	Yes	Yes	GRTU	All	No	Yes
NL	CNV, FNV	All All	Yes Yes	Yes Yes	Inretail Vakcentrum VGL	47 47 47	Yes Yes Yes	Yes Yes Yes
PL	NSZZ Solidarność	All	Yes	Yes	PoHiD	All	No	Yes
PT	CESP, SITESE	All All	Yes Yes	No Yes	APED	All	Yes	Yes
RO	FSC	All	Yes	Yes	FPRC	46, 47	No	Yes
SE	Handels, Unionen	All All	Yes Yes	Yes Yes	Svensk Handel	All	Yes	Yes
SI	SDTS	All	Yes	No	TZSLO	All	Yes	Yes
SK	OZ POCHR	All	Yes	Yes	ZOCR SR	46, 47	Yes	Yes
ES	CCOO- Servicios, FeSMC-UGT	All 46, 47	Yes Yes	Yes Yes	ACES ANGED ASEDAS	46, 47 46, 47 46, 47	No Yes No	Yes Yes Yes
UK	USDAW	All	Yes	Yes	BRT	46, 47	No	Yes

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

### Other European trade union associations

A number of other European-level trade union organisations play some role in the commerce sector for a variety of reasons. UNI Europa affiliated trade unions additionally do not represent all NACE codes making up the commerce sector in two further countries, Finland and Lithuania (members only cover NACE 47). However, here it must be recognised that in these countries there are no trade unions in these sectors, which means this does not really constitute a representativeness gap. UNI Europa members in all 26 countries are represented in collective bargaining, with the majority of them taking part in multi-employer bargaining. As indicated above, while in the Czech Republic, Estonia, Greece, Croatia, Romania and Slovenia all trade unions involved in collective bargaining in the sector are affiliated to UNI Europa, in the other Member

States (with the exception of Bulgaria and Slovenia) some trade unions that are members of UNI Europa are involved in collective bargaining, but not all of them. Many of these are affiliated to other European-level sectoral social partner organisations (see Table below). However, these organisations are not directly related to the commerce sector. It can therefore be assumed that UNI Europa is the main commerce sector-related European trade union association. IndustriALL organises 16 of the trade unions active in the commerce sector not affiliated to UNI Europa (in Austria, Cyprus, Denmark, Finland, France, Germany, Italy, Luxembourg, the Netherlands and Spain). This is largely a function of the different nature of the skills and tasks involved in the provision of services in NACE 45, as IndustriALL is an organisational entity largely representing metalworkers and workers in the manufacturing sector, which has a particular relevance for the motor vehicle repair sector. Six further trade unions are affiliated to EFFAT (due to the link between the commerce sector and food manufacturing and trade).

**Table 32: Sector-related trade unions affiliated to UNI Europa and other European associations**

Country	Trade unions affiliated to UNI Europa	Trade unions not affiliated to UNI Europa	Organised in which other European sectoral or cross-sectoral trade union organisation
AT	GPA-djp, vida	PRO-GE	EFFAT, ETUC, IndustriALL
		VAAÖ	None
BE	ACLVB-CGSLB, ACV-CSC Alimentation et Services, BBTk-SETCa, CNE, LBC-NVK	ABVV/FGTB Horval, ABVV-Metaal, (ABVV-FGTB) MWB, ACV-CSC METEA	EMF, ETUC
BG	None	ITUFECCCTCS	None
		NFSCSCT Podkrepa Services Union	EPSU
CY	OBIEK-SEK, OIYK-SEK	OMEPEGE-SEK	EFFAT, ETF
		SEGDAELIN-PEO	EFFAT, UISTAAC
		SEMMHK-PEO	None
CZ	OSPO		
DE	ver.di	CGM, DHV	CESI
		IG Metall	IndustriALL
DK	HK, NNF, 3F	Dansk Metall	IndustriALL
		Malerforbundet	EFBWW, IndustriALL
EE	ESTAL, ETKA		
EL	OIYE	Trade Union of Estee Lauder Employees, Trade Union of Lidl Employees	
ES	CCOO-Servicios, ELA-Zerbitzuak, FeSMC-UGT	CCOO-Industria <sup>36</sup>	IndustriALL
		CIG Servizio, FETICO	
		FASGA	CESI
FI	ILRY, PAM	RO, TEAM, Teollisuusliitto	IndustriALL
		SOA/ERTO	ETF
		SFL, YTN	
FR	CFDT, CFDT-Cadres, CGT-Commerce, FEC-FO,	CFE-CGC Métallurgie, CFTC Métallurgie, FGMM-CFTD, FO	IndustriALL

<sup>36</sup> CCOO-Industria is affiliated to UNI Europa, but not in the commerce sector.

Country	Trade unions affiliated to UNI Europa	Trade unions not affiliated to UNI Europa	Organised in which other European sectoral or cross-sectoral trade union organisation
	FGTA-FO	Métaux, FTM-CGT, UNSA	
		CFE-CGC Agroalimentaire, FGA-CFDT	EFFAT
		FNAF-CGT	
HR	STH		
HU	KASZ	KDFSZ	
IE	Mandate	SIPTU	ETF, EFFAT, ETUC
IT	FILCAMS-CGIL, FISASCAT-CISL, UILTuCS-UIL	FIM-CISL, FIOM-CGIL, UILM	IndustriALL
LT	LKKDPS, LPSDPS		
LU	OGBL, LCGB commerce, food processing and catering	Garages LCGB-ASG	IndustriALL
LV	LTDA		
MT	GWU	UHM Voice of the Workers	ETUC, EZA
NL	CNV Vakmensen, FNV	LBV, VCP (formerly 'De Unie MHP'), VHP, W.I.M.	
PL	NSZZ Solidarność	FZZPSPHiU	
PT	SITESE	CESP	
RO	FSC		
SE	AHT, Handels, Unionen	IF Metall, Lederana	
		Sveriges Farmaceuter	Pharmaceutical Care Network Europe
SI	None	SDTS	ETUC
		SGS, STS-KS 90	
SK	OZPOCR		
UK	GMB, Unite, USDAW		

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

## Other European employer organisations and EU business associations

Similarly, in relation to the representation of employers in the commerce sector, there are some other European-level actors present. While EuroCommerce does have member organisations in every EU country with the exception of Lithuania, only 30 organisations cover the whole of the commerce sector whereas many only organise employers in one or several NACE codes. However, Bulgaria is the only country where EuroCommerce does not have members covering all NACE codes. As indicated above in 9 countries (Bulgaria, Cyprus, Estonia, Hungary, Lithuania, Malta, Poland, Romania and the UK) EuroCommerce does not have members directly involved in collective bargaining, although bargaining may still take place at the company level. However, since in Estonia, Hungary, Lithuania, Malta, Poland, Romania and the UK there are no employer organisations in the sector involved in collective bargaining, this does not constitute a representativeness gap as such.

In 21 countries there are employer organisations present (and some of them involved in collective bargaining) which are not affiliated to EuroCommerce, but which are in some cases members of other European sectoral and cross-sectoral employer organisations. There are 10 commerce sector-related employer organisations (from 7 different Member States) that are members of UEAPME (representing SMEs at cross-sectoral level). There are 3 organisations that are members of the European Automobile Manufacturers' Association (ACEA) (from 3 different Member States), and a further 4 are members of the European Council for Motor Trades and Repairers (CECRA) (from 4 different Member States), representing respectively automobile manufacturers and traders.

The focus of ACEA and CECRA is on commerce activities referred to in NACE 45 (motor vehicles and motorcycles). As for the commerce sector-related employer organisations affiliated to UEAPME, only CNPA and FFC in France and ZDK in Germany are limited to NACE 45. All other 7 employer organisations affiliated to UEAPME are covering retail (NACE 47) and in some cases wholesale (NACE 46). When only considering retail and wholesale, UEAPME would therefore remain a relevant European organisation with 7 affiliates representing SMEs in the commerce sector in 6 different Member States.

**Table 33: Sector-related national employer organisations affiliated to EuroCommerce and other European associations and supra-national affiliate members of EuroCommerce**

Country	Employer organisations affiliated to EuroCommerce	Employer organisations not affiliated to EuroCommerce	Membership in which other European sectoral or cross-sectoral employer organisation
AT	WKÖ BGA, WKÖ BGHADP, , WKÖ BSH	FGTS, WKÖ BIF	
		ÖAV	PGEU
BE	Comeos	UCM, UNIZO	UEAPME
		FGBB, Traxio	
		Grymafer, NUHOS/UNEBO, OPAHACO	Employed Community Pharmacists in Europe (EPHEU), ENFE, ETTF, Eurometal.net, European Union of the Social Pharmacies (EUSP)
BG	AMT		
CY	KEBE	SEMO	ACEA
CZ	SOCR ČR	AČTO	IRE
		APEK	Ecommerce Europe (affiliate member of EuroCommerce)
DE	BGA, HDE	ZDK	UEAPME
DK	Dansk Erhverv	ABAF, BA	
		DI	BusinessEurope
		SKAD	Eurogarant
EE	EKL	AMTEL	ACEA
		EEL	EMOTA (affiliate member of EuroCommerce)
		EKTK	
EL	ESEE, SELPE	GSEVEE	UEAPME
ES	ACES, ANGED, ASEDAS	ABECAR, AECQ, AGES, CEC, CEES, FANDE, FEIFAR, FENPYD, La Única,	

Country	Employer organisations affiliated to EuroCommerce	Employer organisations not affiliated to EuroCommerce	Membership in which other European sectoral or cross-sectoral employer organisation
		AEFI	FEUPF
		CEGAL	EIBF
		FEDEQUIM	BusinessEurope
FI	ETU, Kauppa	APTA, ARL	
		AKL	CECRA
FR	CDCF, CDNA, CGI, FCD, Fédération de l'Horlogerie, FEH, FFQ, FICIME, FMB, FNH, FNMJ, FNP, SNOR, UDO, UFIP, Union Sport et Cycle, UPECAD	FEC, FNAA, UCV	
		UBH	World Jewellery Confederation
		CGAD, CNPA, FFC	UEAPME
HU	OKSZ, VOSZ	ÁFEOSZ, MNKSZ	EUROCOOP
		KISOSZ	UEAPME
IE	Retail Ireland		
IT	Confcommercio, Federdistribuzione	AGCI, Casartigiani, CLAAI, CNA, Confartigianato, Federconsumo	
		Confesercenti	Enterprise Europe Network
		ANCC-COOP	EUROCOOP
		ANCD CONAD	Independent Retail Europe
LT		LPIA	
LU	ADAL, CLC	FDA	UEAPME
		FEGARLUX	CECRA
MT	GRTU		UEAPME
NL	CBL, Inretail, MKB-Nederland, RND, Vakcentrum, VGT, VWDHZ, WTG	BOVAG	CECRA
		Dibevo	EPO
		NVCW	
PL	POHiD	FPH, PIH	
PT	ACB, ACPorto, ADIPA, APED, CCP	ACAP	ACEA
		ANECRA	CECRA
SE	Svensk Dagligvaruhandel, Svensk Handel	Almega, MAF, TeknikGrossisternas Arbetsgivareförening	
		KFO	CEEP
		Livsmedelsföretagen	FoodDrinkEurope

Country	Employer organisations affiliated to EuroCommerce	Employer organisations not affiliated to EuroCommerce	Membership in which other European sectoral or cross-sectoral employer organisation
SI	TZSLO	OZS	UEAPME
		PTZ	Small Business Alliance
		ZDS	BusinessEurope
SK	COOP Jednota, SAMO, ZOČR SR		
UK	BRC		
<b>Supra-national affiliate members of EuroCommerce</b>			
<b>Members in</b>			
AT, BE, DE, IT, (and individual company members)	Direct Selling Europe		
BE, BG, CZ, DE, DK, EL, ES, FI, FR, HU, IE, IT, LU, NL, PL, PT, RO	Ecommerce Europe		
BE, DE, FI, FR and company members	EDRA (European DIY Retail Association)		
AT, BE, DE, EE, EL, ES, FI, HR, IE, IT, LT, NL, RO, SE, SI, UK	EMOTA (European eCommerce & Omni-Channel Trade Association)		
BE, CY, DE, EL, ES, FR, IT, LU, NL, PT and company members	ETRC (European Travel Retail Council)		
AT, BE, DE, DK, ES, FI, FR, HU, IT, NL, PL, PT, SE, UK	EUEW (European Union of Electric Wholesalers)		
AT, BE, CZ, DK, ES, FI, FR, DE, IE, IT, NL, PT, SE, UK	FECC (European Association of Chemical Distributors)		
BG, CZ, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PL, PT, RO, SE, SI, SK, UK	Seldia (European Direct Selling Association)		

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018) and EuroCommerce

**Table 34: Other EU associations with commerce sector national employer organisations as member**

Other EU employer organisation/EU business association		Member States with an affiliate according to organisation website
Abbreviation	Full name	
ACEA	European Automobile Manufacturers' Association	All Member States except HR and LU
BusinessEurope	BusinessEurope	All Member States
CECRA	European Council for Motor Trades and Repairers	AT, BE, CZ, DE, DK, ES, FI, FR, IE, LU, NL, PT, SE, SI, SK, UK
EIBF	European and International Booksellers' Federation	AT, BE, BG, CY, CZ, DE, DK, EE, EL, ES, FI, FR, IT, LU, LV, NL, PL, PT, SE, SI, UK
ENFE	n/d	n/d
Enterprise Europe Network	Enterprise Europe Network	n/d
EPhEU	Employed Community Pharmacists in Europe	AT, DE, FR, HR, LU, PL, UK Observers: BE, HU
EPO	European Pet Organisation	AT, DE, ES, IT, NL, SE, UK
EUROCOOP	European Community of Consumer Cooperatives	Members in 19 European countries
Eurogarant	Eurogarant	n/d
Eurometal.net	Eurometal.net	n/d
EUSP	European Union of the Social Pharmacies	BE, FR, IT, PT
ETTF	European Timber Trade Federation	AT, BE, DE, DK, EL, ES, FR, IT, LU
FEUPF	Fédération Européenne des Unions Professionnelles de Fleuristes	n/d
FoodDrinkEurope	FoodDrinkEurope	AT, BE, CZ, DE, DK, EE, ES, FI, FR, HU, IE, LU, PT, RO, SK, UK
Independent Retail Europe	Independent Retail Europe	CZ, DE, FR, UK and corporate members
IRE	n/d	n/d
PGEU	Pharmaceutical Group of the European Union	All Member States except LT
European Small Business Alliance	European Small Business Alliance	BE, DE, HR, NL, PL, SE, SI
UEAPME	European Confederation of Small and Medium Enterprises Associations	All Member States except UK

World Jewellery Confederation	World Jewellery Confederation	AT, BE, DE, DK, EL, FI, IT, LT, NL, PT, SE, SI, UK
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Source: Own research, based on national contributions by the Network of Eurofound Correspondents (2017–2018).

## Summary

The tables below demonstrate that despite a significant number of trade union and employer organisations in the commerce sector at Member State level not being affiliated to UNI Europa and EuroCommerce, the organisations in membership are those with the highest number of members and collective bargaining coverage in their country (where collective bargaining exists in the sector). The Member States with the largest commerce sector workforce (in Table 35) are represented by UNI Europa and EuroCommerce in the European sectoral social dialogue committee for the commerce sector.

**Table 35: Affiliations in Member States with employment in excess of 1,000,000 in the sector**

Country	Total employment (2015)	At least one trade union affiliated to UNI Europa	At least one UNI Europa affiliate involved in collective bargaining	At least one employer organisation affiliated to EuroCommerce	At least one EuroCommerce affiliate involved in collective bargaining	Corporate member of EuroCommerce adding to representativeness	Corporate member of EuroCommerce involved in collective bargaining
DE	6,409,246	Yes	Yes	Yes	Yes	Yes	Yes
UK	4,932,820	Yes	Yes	Yes	No	Yes	Yes
FR	3,318,441	Yes	Yes	Yes	Yes	Yes	Yes
IT	3,302,288	Yes	Yes	Yes	Yes	No	No
ES	2,955,041	Yes	Yes	Yes	Yes	No	No
PL	2,245,115	Yes	Yes	Yes	No	No	No
NL	1,473,526	Yes	Yes	Yes	Yes	Yes	Yes

Source: SBS for data, Network of Eurofound Correspondents' national contributions to this study (2017–2018) for information on affiliations

As for the Member States with the highest proportion of the national workforce in the commerce sector (Table 36), there appears to be no member organisation for UNI Europa in Bulgaria and no member organisation for EuroCommerce in Lithuania.

**Table 36: Affiliations in Member States where the commerce sector made a significant contribution to overall employment**

Country	Total employment (2015)	At least one trade union affiliated to UNI Europa	At least one UNI Europa affiliate involved in collective bargaining	At least one employer organisation affiliated to EuroCommerce	At least one EuroCommerce affiliate involved in collective bargaining
BG	496,087	No	No	Yes	No
CY	62,154	Yes	Yes	Yes	No
EL	639,710	Yes	Yes	Yes	Yes
IE	345,911	Yes	Yes	Yes	Yes



Country	Total employment (2015)	At least one trade union affiliated to UNI Europa	At least one UNI Europa affiliate involved in collective bargaining	At least one employer organisation affiliated to EuroCommerce	At least one EuroCommerce affiliate involved in collective bargaining
LT	254,750	Yes	Yes	No	No
LU	50,126	Yes	Yes	Yes	Yes
LV	161,823	Yes	Yes	Yes	Yes
MT	32,404	Yes	Yes	Yes	No
NL	1,473,526	Yes	Yes	Yes	Yes
PT	735,834	Yes	Yes	Yes	Yes

Source: SBS, extracted 25 May 2018

### Capacity to negotiate

Since the establishment of the European sectoral social dialogue committee for the commerce sector in 1998, 27 joint texts have been agreed.

**Table 37: Texts agreed by UNI Europa and EuroCommerce in the European sectoral social dialogue committee for the commerce sector**

List of all texts agreed between UNI Europa and EuroCommerce	
26/05/2018	Guidelines on Telework and ICT-mobile work
11/02/2016	Voluntary guidelines supporting age diversity in Commerce
23/06/2015	Joint pledge to join the European Alliance for Apprenticeships
30/10/2014	Recommendations and action plan on social dialogue in the EU13 and Candidate countries
02/10/2013	Position paper on the Consultation of Social Partners under Article 154 TFEU on undeclared work
08/03/2013	Joint statement on the Institutions for Occupational Retirement Provision (IORP) directive revision
24/04/2012	Contribution of the social partners for commerce regarding consensus social issues for the Retail Action Plan
20/10/2011	Joint opinion on the 'Agenda for new skills and jobs'
04/08/2010	Common contribution of the social partners for commerce to some flagship initiatives of the 'EU 2020: A European strategy for a smart, sustainable and inclusive growth'
21/10/2009	Preventing third party violence in commerce – A toolkit
18/12/2008	Economic crisis: joint reaction of the social partners for commerce
12/12/2008	Joint opinion on 'Migration & mobility: challenges and opportunities for EU education systems'
28/02/2008	Common contribution of EuroCommerce and UNI Europa Commerce regarding the 'Second stage consultation of the European social partners on active inclusion of people furthest away from the labour market'
28/11/2006	BeQuaWe European Certified Training
28/11/2006	Promoting a safer working and shopping environment in European Commerce
31/08/2005	Joint statement on the Directive on Services in the Internal Market
16/03/2005	Commitment to support the European Youth Initiative

28/05/2004	Statement on promoting employment and integration of disabled people in the European commerce and distribution sector
05/11/2003	Joint Statement on Corporate Social Responsibility
06/11/2002	Joint statement by EuroCommerce and UNI Europa Commerce on European social dialogue for commerce
11/03/2002	Voluntary guidelines supporting age diversity in Commerce
26/04/2001	European Agreement on Guidelines on Telework in Commerce
15/05/2000	Joint statement on combating racism and xenophobia
14/04/2000	Joint declaration of the conference on employment, Lisbon, 14 April 2000
06/08/1999	EuroCommerce and Euro-Fiet: Agreement on Fundamental Rights and Principles at Work
30/11/1998	Joint opinion by EuroCommerce and Euro-FIET on employment
30/11/1998	Agreement between EuroCommerce and Euro-FIET on the establishment of a sectoral dialogue committee in commerce (rules of procedures)
01/12/1997	Declaration of the social partners on the Green Paper on Commerce
01/10/1997	Agreement on the setting-up of a working group on the prevention of racial discrimination
29/11/1996	Joint opinion on 'Promoting employment in European Commerce'
08/03/1996	Joint statement on combating child labour

*Source: information provided by UNI Europa and Eurocommerce*

The statutes of UNI Europa provide a mandate for regional organisation of UNI to negotiate on behalf of its members in relation to the European sectoral social dialogue committee (though the latter is not specifically referred to). The statutes in Article 3 oblige UNI Europa to fulfil its obligations in relation to its objectives in:

- deciding policy and action with respect to the institutions of the European Union to ensure that there is a social and democratic dimension to European integration;
- representing affiliates in European institutions whose activities affect the social, economic and cultural conditions of affiliates and their members;
- co-ordinating the activities of UNI affiliates in Europe and offering assistance and support as appropriate; and *most crucially*,
- undertaking collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee.

It is therefore the UNI Europa Regional Executive Committee, which meets once a year, that has the power to provide a mandate. The composition of the Regional Executive Committee is clearly outlined in Article 9 of the statutes. This Article also states that 'where issues of concern to a particular sector are involved, a nominee or nominees of the group concerned may be invited to attend meetings of the Regional Executive Committee in an advisory capacity'. Article 10 of the statutes also provide the opportunity to establish a Regional Management Committee. There are no clear provisions regarding responsibility for the approval of texts agreed within the remit of the European sectoral social dialogue committee.

EuroCommerce's Articles of Association do not make direct reference to the European social dialogue process, but list the following among the activities of the association:

- to conduct any research, collect and distribute scientific information concerning the legal, economic and social status of the firms in the relevant sectors;
- to ensure a permanent link with the European Union and with all other international bodies with a view to represent and defend the professional interests of its members as a whole;
- to inform its members about all matters of mutual interest;
- to adopt positions on behalf of commerce and co-ordinate the actions of its members, with a view to contributing to European integration; and more generally speaking,
- to carry out all activities which, broadly speaking, may contribute to the achievement of the supranational objectives set forth in the previous paragraphs.

While the final decision-making body is the General Assembly (in which all members are represented), on a day-to-day basis key decisions are taken by the Board of Directors, which consists of a maximum of 32 members and is appointed by the General Assembly. The Board of Directors approves the major positions and policies as well as the strategic work areas and major priorities. The Board of Directors meets twice a year and it is stipulated that its decisions are to be made based on consensus whenever possible. If no consensus can be reached, decisions of the Board of Directors shall be made based on a simple majority of the votes cast.

For example, in the case of the recently adopted Guidelines for Telework (adopted in May 2018), the initial idea was communicated in 2016 to the EuroCommerce Social Affairs Committee and the EuroCommerce Board of Directors. As there is broad overall support in the Board of Directors regarding the desirability of EuroCommerce's participation in the European sectoral social dialogue committee on commerce and the commitments undertaken by the EuroCommerce secretariat and social affairs committee in this regard, there is no realignment needed with the Board of Directors or General Assembly. Communication between the secretariat and the members on draft versions of joint positions in the European sectoral social dialogue committee is made through the EuroCommerce social affairs committee, and final decisions are made by the Director-General.

The Director-General of EuroCommerce is competent to negotiate on behalf of the organisation. He thus has a permanent mandate, for which he is accountable to the EuroCommerce Board of Directors. The Director-General also maintains the relationship with the trade union counterparts of UNI Europa. In addition, the Director-General may facilitate alignment among members when a consensus cannot be reached.

The social affairs committee forms the backbone of EuroCommerce's work on **employment, skills and social dialogue**. Its role and mandate are to:

- raise, discuss and exchange best practices on issues and projects relevant for the sector within the area of social affairs;
- regularly discuss priority issues, align members and agree on advocacy;
- prepare the annual work programme including action plans on selected priorities, and review progress against these action plans;
- engage with relevant EU policymakers and stakeholders to improve EuroCommerce's understanding on issues and foster better understanding of the retail and wholesale sector by these parties as part of EuroCommerce's advocacy activities.

National associations, corporate members and affiliated member organisations may all appoint a representative to the social affairs committee. Decisions in the social affairs committee are generally made by consensus. European sectoral social dialogue committee texts are disseminated via the EuroCommerce website or a newsletter to all members, and social affairs committee members are kept informed by email. Furthermore, the EuroCommerce Annual Report and the EuroCommerce Director-General's Report can also be used for this purpose.

### Effective participation in the European sectoral social dialogue committee

Looking at the effective participation in the European sectoral social dialogue committee for the commerce sector over the years 2016 and 2017, there were representatives involved from trade unions from 10 Member States and from employer organisations from 13 Member States.

**Table 38: Effective participation in the European sectoral social dialogue committee for the commerce sector**

<b>Member States with trade union participation in the European sectoral social dialogue committee for the commerce sector in 2016–2017</b>	AT, BE, CZ, EE, ES, FI, FR, IT, PL, SE
<b>Member States with employer participation in the European sectoral social dialogue committee for the commerce sector in 2016–2017</b>	AT, BE, CZ, DE, DK, EE, ES, FI, FR, IT, MT, PT, SE

*Source: Eurofound and European Commission*

There are, however, 16 Member States where UNI Europa has a commerce sector-related trade union as member organisation, that did not participate in meetings of the European sectoral social dialogue committee in 2016 or 2017. These 16 Member States are Croatia, Cyprus, Denmark, Germany, Greece, Hungary, Ireland, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Portugal, Romania, Slovakia and the UK.

As for the employer organisations, there are 14 Member States where EuroCommerce has a member organisation that did not participate in meetings of the European sectoral social dialogue committee in 2016 or 2017. These 14 Member States are: Bulgaria, Croatia, Cyprus, Greece, Hungary, Ireland, Latvia, Luxembourg, the Netherlands, Poland, Romania, Slovakia, Slovenia and the UK.

Member organisations that were not directly represented in meetings of the European sectoral social dialogue committee are normally kept informed about developments in the European sectoral social dialogue committee via their participation in the meetings of statutory bodies of their European organisation, or via its intranet or website.

## 4. Conclusions

With an EU-level workforce of close to 33 million and around 6.2 million companies, the commerce sector makes up a significant share of employment in the European Union. In the countries with the largest commerce sector workforce (Germany, Italy, the Netherlands, Poland, Romania, Spain and the UK) its share of total employment ranges from 10.7% (in Romania) to 19.6% (in Lithuania and Luxembourg). Overall, the sector is dominated by relatively small businesses, with an average of 5 employees per company at EU level. However, in some countries in particular, the sector is dominated by large retail chains, some of which also have an increasingly European (or global) profile.

The sector has undergone significant change in recent decades, with key trends including internationalisation, a degree of concentration, deregulation and technological innovation, with the increasing proliferation of e-commerce both through multi-channel and single-channel companies. Demographic change has influenced a change in consumption patterns. The rise of e-commerce has also affected the required skills mix of the sector. The sector was significantly affected during the peak years of the economic crisis, with most countries witnessing a decline in the number of employees and enterprises. However, the sector has recovered relatively well in most countries, with positive trend developments since 2012; although there has been a decline in the number of enterprises in many countries, the total number of employees has increased.

At European level, UNI Europa and EuroCommerce are the mutually recognised sectoral social partners in the European sectoral social dialogue committee for the commerce sector.

Of the 113 national commerce sector trade unions, 51 are affiliated to **UNI Europa**. This means UNI Europa has members in 26 of the 28 Member States. Bulgaria and Slovenia are the only countries where UNI Europa currently has no members. In 24 Member States, UNI Europa has members covering the entire sector. In Finland and Lithuania, UNI Europa members only cover the retail sector, but there are no trade unions present in these countries covering the other sectors. Only three national member organisations of UNI Europa are not involved in collective bargaining (one each in France, Hungary and Lithuania) with no data available for a further member (in Cyprus). However, with the exception of Hungary, UNI Europa has other members in these countries that are involved in collective bargaining.

With the exception of the two countries where UNI Europa does not have any members, the level of representativeness of its national member organisations is very high domestically.

UNI Europa has the capacity to participate effectively in the European sectoral social dialogue committee and to negotiate on behalf of its members. It has proven its capacity to participate in and contribute effectively in the European sectoral social dialogue committee.

**EuroCommerce** has member organisations in all but one Member State (Lithuania). Of the 150 employer organisations in the sector, 48% are members of EuroCommerce. However, EuroCommerce tends to organise the largest and or most representative employer organisations (in terms of their involvement in collective bargaining) in the sector. In 15 Member States, EuroCommerce members cover the entire sector. In most of the other countries, where EuroCommerce members do not cover all NACE codes, there is no organisation covering all commerce related sectors (e.g. Belgium, Finland, France, Ireland, Latvia, the Netherlands, Portugal, Slovakia, Spain and the UK). The most common structure of domain coverage is sectionalism.

In 8 countries (in addition to Lithuania), EuroCommerce members are not involved in collective bargaining at the national level (for instance, Estonia, Hungary, Poland, Romania and the UK). However, in these countries there are no employer organisations involved in collective bargaining in the sector. In the UK, a number of EuroCommerce's company members have collective agreements at the company level.

EuroCommerce has the capacity to participate effectively in the European sectoral social dialogue committee.

The Social Affairs Committee of EuroCommerce has the mandate to act in the area of social affairs, including in the European sectoral social dialogue committee and is accountable to the Director-General. The Director-General also maintains the relationship with the trade union counterparts of UNI Europa. The Director-General is accountable to the Board of Directors.

Looking at the limits of the representativeness of UNI Europa in relation to the scope of the commerce sector, in the sense that it does not currently have members in all Member States and that its affiliated unions do not cover all NACE sectors in all countries, the representativeness gap linked to the latter is limited as there are no trade unions in other NACE sectors in these countries. As indicated in Chapter 2, while in six EU Member States all trade unions involved in collective bargaining in the sector are members of UNI Europa, in all other Member States (except Bulgaria and Slovenia) there are some trade unions involved in collective bargaining which are members of UNI Europa. Other trade unions are instead affiliated to EFFAT or IndustriALL for example, which are organisations that are not commerce sector-related. Consequently, **UNI Europa** clearly remains the only, and thus the **most representative pan-European trade union organisation for the commerce sector**.

A similar assessment can be made of the limitations of the representativeness of EuroCommerce. Bulgaria is the only country where EuroCommerce does not have members covering all NACE codes. As indicated above, in nine countries (Bulgaria, Cyprus, Estonia, Hungary, Lithuania, Malta, Poland, Romania and the UK), EuroCommerce does not have members directly involved in collective bargaining, although bargaining may still take place at the company level. However, since in Estonia, Hungary, Lithuania, Malta, Poland, Romania and the UK there are no employer organisations in the sector involved in collective bargaining, this does not constitute a representativeness gap as such. However, EuroCommerce additionally directly organises corporate members, many of which do have company-level collective agreements, including in the UK.

There are employer organisations present which are not affiliated to EuroCommerce in 21 countries, some of which are involved in collective bargaining, but which are in some cases members of other European sectoral and cross-sectoral employer organisations. Ten commerce sector employer organisations (from seven different Member States) are members of UEAPME (representing SMEs at cross-sectoral level). Three organisations are members of ACEA (from three different Member States) and a further four are members of CECRA (from four different Member States), representing respectively automobile manufacturers and traders. The focus of ACEA and CECRA is on commerce activities referred to in NACE 45 (motor vehicles and motorcycles). As for the commerce sector-related employer organisations affiliated to UEAPME, three of the ten are limited to NACE 45. All of the seven other employer organisations affiliated to UEAPME cover retail (NACE 47) and in some cases wholesale (NACE 46). Thus, when only considering retail and wholesale, UEAPME would have seven affiliates representing SMEs in the commerce sector in six different Member States.

However, as underlined above, EuroCommerce generally represents the largest and/or nationally most representative employer organisations in the sector. **EuroCommerce** is thus the **most representative European employer organisation for the commerce sector**, and as such the only European employer organisation capable of representing the entire European commerce sector.

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All Eurofound publications are available at [www.eurofound.europa.eu](http://www.eurofound.europa.eu)

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## Annex 1: Details of individual organisations

**Table 39: Trade unions in the commerce sector**

Country	Abbreviation	Full name in English	Full name in original language
AT	GPA-djp	Union of Salaried Private Sector Employees, Graphical Workers and Journalists	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier
AT	PRO-GE	Manufacturing Union	Produktionsgewerkschaft
AT	VAAÖ	Austrian Association of Employed Pharmacists	Verband Angestellter Apotheker Österreichs
AT	vida	vida	vida
BE	ABVV BBTK/SETCa	Christian General Workers Union for Food and Services	Algemeen Christelijk Vakverbond – Confédération des Syndicats Chrétiens
BE	ABVV/FGTB Horval	Belgian General Federation – Food, Horeca and Services	Centrale Voeding, Horeca, Diensten/Centrale Alimentations, Horeca, Services
BE	(ABVV-FGTB) MWB	Metalworkers' Walloon Brussels – Belgian General Federation of Labour	Fédération générale du travail de Belgique - Métallurgistes Wallonie-Bruxelles
BE	ABVV-Metaal	Belgian General Federation of Metal	Algemeen Belgisch Vakverbond - Metaal
BE	ACLVB/CGSLB	General Central of Liberal Trade Unions in Belgium	Algemene Centrale der Liberale Vakbonden Van België - Centrale générale des syndicats libéraux de Belgique
BE	ACV-CSC METEA	Confederation of Christian Trade Unions - Metea	Algemeen Christelijk Vakverbond - Metaal en textiel/Confédération des syndicats chrétiens - Metea
BE	ACV-Voeding en Diensten, CSC-Alimentation et Services	Christian General Workers Union for Food and Services	Algemeen Christelijk Vakverbond - Voeding en Diensten/Confédération des Syndicats Chrétiens - Alimentation et Services
BE	CNE	National Federation of Employees	Centrale nationale des employés
BE	LBC/NVK	National Federation of White-Collar Workers and Professionals/High Potential Workers	Landelijke Bediendecentrale – Nationaal Verbond voor Kaderleden
BG	ITUFECCTCS	Independent Trade Union Federation of Employees in Commerce, Cooperatives, Tourism and Services	Независима синдикална федерация на търговията, кооперациите, туризма и услугите
BG	NFSCSCT Podkrepa Services Union	National Federation Commerce, Services, Customs and Tourism Podkrepa CL	Национална федерация „Търговия, Услуги, Контролни органи и туризъм” на КТ „Подкрепа”
CY	OBIEK-SEK	Federation of Industrial Workers of Cyprus	Ομοσπονδία Βιομηχανικών Εργατοϋπαλλήλων Κύπρου
CY	OIYK-SEK	Cyprus Private Employees	Ομοσπονδία Ιδιωτικών Υπαλλήλων Κύπρου



		Federation	(ΟΙΥΚ-ΣΕΚ)
CY	OMEPEGE-SEK	Employees' Federation of Transport, Petroleum and Agriculture - SEK	Ομοσπονδία Εργατοϋπαλλήλων Μεταφορών, Πετρελαιοειδών και Γεωργίας - ΣΕΚ
CY	SEBETTYK-PEO	Cyprus Industry, Commerce and Press-Printing Houses and General Services Trade Union	Συντεχνία Εργατοϋπαλλήλων Βιομηχανίας, Εμπορίου, Τύπου-Τυπογραφείων και Γενικών Υπηρεσιών Κύπρου (ΣΕΒΕΤΤΥΚ - ΠΕΟ)
CY	SEGDAMELIN-PEO	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union - PEO	Συντεχνία Εργατοϋπαλλήλων Γεωργίας, Δασών, Μεταφορών, Λιμενεργατών, Ναυτεργατών και Συναφών Επαγγελματιών Κύπρου - ΠΕΟ
CY	SEMMHK-PEO	Cyprus Metalworkers, Mechanics and Electricians Trade Union	Συντεχνία Εργατοϋπαλλήλων Μετάλλου, Μηχανοτεχνιτών και Ηλεκτροτεχνιτών Κύπρου (ΣΕΜΜΗΚ)
CZ	OSPO	Trade Union of Commercial Workers	Odborový svaz pracovníků obchodu
DE	CGM	Christian Metalworkers' Union	Christliche Gewerkschaft Metall
DE	DHV	Services Union	Die Berufsgewerkschaft
DE	Fagligt Fælles Forbund (3F)	United Federation of Danish Workers	Fagligt Fælles Forbund
DE	HK	HK Trade	HK Handel
DE	IG Metall	Metalworkers' Union	Industriegewerkschaft Metall
DE	ver.di	United Services Union	Vereinte Dienstleistungsgewerkschaft
DK	Dansk Metal	Danish Metalworkers' Union	Dansk Metalarbejderforbund
DK	Malerforbundet	Danish Painters' Union	Malerforbundet i Danmark
DK	NNF	The Danish Food and Allied Workers' Union	Fødevareforbundet NNF
EE	ESTAL	Estonian Communication and Service Workers' Trade Union	Eesti Side- ja Teenindustöötajate Ametiühingute Liit
EE	ETKA	Estonian Trade Union of Commercial and Servicing Employees	Eesti Teenindus- ja Kaubandustöötajate Ametiühing
EL	OIYE	Greek Federation of Private Employees	Ομοσπονδία Ιδιωτικών Υπαλλήλων Ελλάδος
EL	Trade Union of Estee Lauder Employees	Trade Union of Estee Lauder Employees	Σωματείο Εργαζομένων Estee Lauder Γρ. Σαράντης
EL	Trade Union of Lidl Employees	Trade Union of Lidl Employees	Σωματείο Εργαζομένων Υπαλλήλων Lidl
ES	CCOO-Industria	Industry Federation of the Trade Union Confederation of the Workers' Commissions	Federación de Industria de Comisiones Obreras
ES	CCOO-Servicios	Services Federation of the Trade Union Confederation of Workers' Commissions	Federación de Servicios de Comisiones Obreras

ES	CIG Servizio	Galician Trade Union Confederation	Confederación Intersindical Galega – Servizos
ES	ELA-Zerbitzuak	Basque Workers' Solidarity - Services	Euskal Sindikatua Gizalan
ES	FASGA	Federation of Trade Union Association	Federación de Asociaciones Sindicales
ES	FeSMC-UGT	Service for the Mobility and Consumption of the General Workers' Union	Servicios para la Movilidad y el Consumo de la Unión General de Trabajadores
ES	FETICO	Federation of Independent Trade Workers	Federación de Trabajadores Independientes de Comercio
ES	FICA-UGT	Industry, Construction and Agro - General Workers' Union	Industria, Construcción y Agro - Unión General de Trabajadores
ES	USO	Workers' Trade Union	Unión Sindical Obrera
FI	ILRY	Union of Professional Engineers in Finland	Insinööriiliitto
FI	PAM	Service Union United	Palvelualojen ammattiliitto
FI	Pro	Trade Union Pro	Ammattiliitto Pro
FI	SFL	Finnish Pharmacologist Union	Suomen Farmasialiitto
FI	SOA/ERTO	Finnish Professionals of Optometry SOA / Federation of Special Service and Clerical Employees ERTTO	Suomen Optometrian Ammattilaiset / Erityisaloiden Toimihenkilöliitto ERTTO
FI	TEAM	Industrial Union TEAM	TEAM Teollisuusalojen ammattiliitto
FI	Teollisuusliitto	Finnish Industrial Union	Teollisuusliitto
FI	YTN	Federation of Professional and Managerial Staff	Ylemmät Toimihenkilöt
FR	CFDT-Cadres	CFDT Union for Engineers and Managers	Union confédérale des ingénieurs et cadres CFDT
FR	CFDT-Services	Federation for Services - French Democratic Confederation of Labour	Fédération des Services CFDT
FR	CFE-CGC Agroalimentaire	Agrofood Industry CFE-CGC Federation	La Fédération Nationale de l'Agroalimentaire CFE-CGC
FR	CFE-CGC Métallurgie	CFE-CGC Metal	CFE-CGC Métallurgie
FR	CFTC-CSFV	CFTC Federation of Commerce and Sales Forces	Fédération des Syndicats Commerce, Services et Force de Vente
FR	CFTC Métallurgie	Metalworkers' Union CFTC	Syndicat CFTC de la Métallurgie
FR	CGT Commerce	CGT Federation Retail and Services	Fédération CGT Commerce et Services
FR	FEC-FO	Federation of Employees and Managers, Force Ouvrière	Fédération des Employés et Cadres, Force Ouvrière
FR	FGA-CFDT	General Federation of Agrofood Industry - French Democratic Confederation of	Fédération générale de l'agroalimentaire - Confédération française démocratique du travail

		Labour	
FR	FGMM-CFDT	General Federation of Mining and Metal Industry - French Democratic Confederation of Labour	Fédération générale des mines et de la métallurgie - Confédération française démocratique du travail
FR	FGTA-FO	General Federation of Workers in Agriculture, Food, Tobacco and Related Services, Force Ouvrière	Fédération générale des travailleurs de l'agriculture, de l'alimentation, des tabacs et des activités annexes, Force Ouvrière
FR	FNAF-CGT	National Federation of Agro-food and Forestry Industries - General Confederation of Labour	Fédération nationale agroalimentaire et forestière - Confédération générale du travail
FR	FNECS CFE-CGC	National Federation of Retail and Services Managers	Fédération nationale de l'encadrement du commerce et des services
FR	FO Métaux	Federation of the Metal Industry FO	Fédération Confédérée FO de la Métallurgie
FR	FTM-CGT	Workers' Federation of the Metal Industry - General Confederation of Labour	Fédération des travailleurs de la métallurgie - Confédération générale du travail
FR	UNSA	Federation of Commerce and Services	Fédération des Commerces et des Services
HR	STH	Commercial Trade Union of Croatia	Sindikat trgovine Hrvatske
HU	KASZ	Trade Union of Commercial Employees	Kereskedelmi Alkalmazottak Szakszervezete
HU	KDFSZ	Independent Union of Retail Workers	Kereskedelmi Dolgozók Független Szakszervezete
IE	Mandate	Mandate	Mandate
IE	SIPTU	SIPTU	SIPTU
IT	FILCAMS-CGIL	Italian Federation of Workers in the Trade, Tourism, and Service Sectors	Federazione Italiana dei lavoratori del Commercio, Alberghi, Mense e Servizi
IT	FIM-CISL	Italian Federation of Metalworkers	Federazione Italiana Metalmeccanici
IT	FIOM-CGIL	Federation of White and Blue-Collar Metalworkers	Federazione Impiegati Operai Metallurgici
IT	FISASCAT-CISL	Italian Federation of Trade Unions of Workers in the Tourism, Trade Service, and Related Sectors	Federazione Italiana Sindacati Addetti Servizi Commerciali, Affini e del Turismo
IT	UILM	Italian Union of Metalworkers	Unione Italiana Lavoratori Metalmeccanici
IT	UILTuCS-UIL	Italian Union of Workers in the Tourism, Trade, and Service Sectors	Unione Italiana Lavoratori Turismo Commercio Servizi
LT	LKKDPS	Lithuanian Trade Union of Commerce and Cooperation Workers	Lietuvos komercijos ir kooperacijos darbuotojų profesinė sąjunga

LT	LPSDPS	Lithuanian Service Workers Trade Union	Lietuvos paslaugų darbuotojų profesinė sąjunga
LT	SAMPRO	Trade Union of Hired Employees	Samdomų darbuotojų profesinė sąjunga
LU	Garages LCGB-ASG	Confederation of Christian Unions in Luxembourg - Union of workers of the repair sector	Lëtzebuerger Chrëschtliche Gewerkschafts-Bond - Association des Salariés du Secteur des Garages
LU	LCGB commerce, food processing and catering	Confederation of Christian Unions in Luxembourg – Services & Retail	Lëtzebuerger Chrëschtliche Gewerkschaftsbond – Services & Commerce
LU	OGBL	Trade Union Confederation of Luxembourg	Onofhängege Gewerkschaftsbond Lëtzebuerg
LV	LTDA	Latvian Commercial Workers Trade Union	Latvijas Tirdzniecības darbinieku arodbiedrība
MT	GWU	General Workers' Union	General Workers' Union
MT	UHM Voice of the Workers	UHM Voice of the Workers	UHM Voice of the Workers
NL	CNV Vakmensen	Christian National Union Federation Professionals	Christelijk Nationaal Vakverbond Vakmensen
NL	FNV	Federation of Dutch Trade Unions	Federatie Nederlandse Vakbeweging
NL	LBV	National Interest Association	Landelijke Belangen Vereniging
NL	VCP (formerly 'De Unie MHP')	The Union	De Unie – this organisation is now called VCP (Vakcentrale voor Professionals)
NL	VHP	Association of HEMA Staff	Vereniging HEMA Personeel
NL	W.I.M.	Employee Association IKEA	Werknemersvereniging IKEA Medewerkers
PL	FZZPSPHiU	Federation of Trade Unions of Employees in Co-operatives, Production, Commerce and Services in Poland	Federacja Związków Zawodowych Pracowników Spółdzielczości Produkcji, Handlu i Usług w Polsce
PL	NSZZ Solidarność	Niezależny Samorządny Związek Zawodowy „Solidarność”	Independent Self-governing Labour Union 'Solidarity'
PT	CESP	Union of Workers in Commerce, Administration and Services of Portugal	Sindicato dos Trabalhadores do Comércio, Escritórios e Serviços de Portugal
PT	SITese	Union of Workers and Staff in Services, Commerce, Restaurants and Tourism	Sindicato dos Trabalhadores e Técnicos de Serviços, Comércio, Restauração e Turismo
RO	FSC	Trade Union Federation of Commerce	Federația Sindicatelor din Comerț
SE	AHT	The Academics' Union in Trade and Service	Akademikerförbunden
SE	Handels	The Commercial Employees' Union	Handelsanställdas förbund
SE	IF Metall	The Swedish Metalworkers' Union	IF Metall

SE	Lederana	Lederana	Lederana
SE	Sveriges Farmaceuter	Swedish Pharmacists Association	Sveriges Farmaceuter
SE	Unionen	Unionen	Unionen
SI	SDTS	Slovenian Trade Union of Workers in Commerce	Sindikat delavcev trgovine Slovenije
SI	SGS	The Gorenjska Region Council of Trade Unions	Svet gorenjskih sindikatov
SI	STS-KS 90	Slovenian Trade Union of Commerce	Sindikat trgovine Slovenije KS 90
SK	OZPOCR	Trade Union Association of Employees in Commerce and Tourism	Odborový zväz pracovníkov obchodu a cestovného ruchu
UK	GMB	General, Municipal and Boilermakers Union	General, Municipal and Boilermakers Union
UK	Unite	Unite the Union	Unite the Union
UK	USDAW	Union of Shop, Distributive and Allied Workers	Union of Shop, Distributive and Allied Workers

**Table 40: Employer organisations in the commerce sector**

Country	Abbreviation	Full name in English	Full name in original language
AT	FGTS	Association for Garages, Petrol and Service Stations	Fachverband Garagen-, Tankstellen- und Serviceunternehmen
AT	ÖAV	Austrian Pharmacists' Association	Österreichischer Apothekerverband
AT	WKÖ BGA	Foreign Trade Association	Bundesgremium Außenhandel
AT	WKÖ BGHADP	Association for Commerce with Drugs, Perfumery, Chemicals and Paint	Bundesgremium Handel mit Arzneimitteln, Drogerie- und Parfümeriewaren sowie Chemikalien und Farben
AT	WKÖ BIF	Sectoral Association Automotive Engineering	Bundesinnung Fahrzeugtechnik
AT	WKÖ BSH	Federal Section Commerce of the Federal Economic Chamber	Bundessparte Handel
BE	Comeos	Comeos	Comeos
BE	FGBB	Federation Of Big Bakeries Belgium	Federatie van grote bakkerijen van België
BE	Grymafer	The Belgian Association of Metal Stockholders	Groupement des Marchands de Fer de Belgique
BE	NUHOS/UNEBO	National Union of Wood Companies	Union Nationale des Entreprises du Bois/Nationale Unie Houtsector
BE	OPHACO	Office of Cooperative Pharmacies of Belgium	Office des Pharmacies Coopératives de Belgique
BE	Traxio	Traxio	Traxio

BE	UCM	Union of Small Firms and Traders	Union des Classes Moyennes
BE	UNIZO	Union of Independent Enterprises	Unie van Zelfstandige Ondernemers
BG	AMT	Association for Modern Trade	Сдружение за модерна търговия (CMT)
BG	UTB	Union of Traders in Bulgaria	Съюз на търговците в България
CY	KEBE	Cyprus Chamber of Commerce and Industry	Κυπριακό Εμπορικό και Βιομηχανικό Επιμελητήριο
CY	SEMO	Motor Vehicles Importers Association	Σύνδεσμος Εισαγωγέων Μηχανοκίνητων Οχημάτων
CZ	AČTO	Association of Czech Traditional Trade	Asociace českého tradičního obchodu
CZ	APEK	Association of E-commerce	Asociace pro elektronickou komerci
CZ	SOCR ČR	Czech Confederation of Commerce and Tourism	Svaz obchodu a cestovního ruchu České republiky
DE	BGA	Federation of German Wholesale and Foreign Trade	Bundesverband Großhandel, Außenhandel, Dienstleistungen
DE	HDE	Confederation of German Retail	Handelsverband Deutschland
DE	ZDK	Federal Association for the German Motor Vehicle Repair Services	Zentralverband Deutsches Kraftfahrzeuggewerbe
DK	ABAF	The Employer Association in the Danish Auto Business	Autobranchens Arbejdsgiverforening
DK	BA	Employer Organisation of Cooperatives in Retail	Brugsforeningernes Arbejdsgiverforening
DK	Dansk Erhverv	Confederation of Danish Enterprises	Dansk Erhverv
DK	DI	Confederation of Danish Industry	DI
DK	SKAD	SKAD (Rebuilding of vehicles and auto damage)	SKAD (Køretøjsopbygning og Autoskade)
EE	EEL	Estonian E-Commerce Association	Eesti E-Kaubanduse Liit
EE	EKL	Estonian Traders' Association	Eesti Kaupmeeste Liit
EE	EKTK	Estonian Chamber of Commerce and Industry	Eesti Kaubandus-Tööstuskoda
EL	ESEE	Hellenic Confederation of Commerce and Entrepreneurship	Ελληνική Συνομοσπονδία Εμπορίου & Επιχειρηματικότητας
EL	GSEVEE	Hellenic Confederation of Professionals, Craftsmen and Merchants	Γενική Συνομοσπονδία Επαγγελματιών Βιοτεχνών Εμπόρων Ελλάδας
EL	SELPE	Hellenic Retail Business Association	Σύνδεσμος Επιχειρήσεων Λιανικής Πώλησης Ελλάδος

ES	ACES	Association of Spanish Chain Supermarkets	Asociación de Cadenas Españolas de Supermercados
ES	AECQ	Spanish Chemical Trade Association	Asociación Española del Comercio Químico
ES	AEFI	Spanish Association of Florists	Asociación Española de Floristas
ES	AEVECAR	Spanish Association of Fuel Retailers	Agrupación Española de Vendedores al por menor de Carburantes y Combustibles
ES	AGES	Association of Service Stations Managers	Asociación de Gestores de Estaciones de Servicio
ES	ANGED	National Association of Large Distribution Companies	Asociación Nacional de Grandes Empresas de Distribución
ES	ASEDAS	Spanish Association of Distributors, Self-Service Chains and Supermarkets	Asociación Española de Distribuidores, Autoservicios y Supermercados
ES	CEC	Spanish Trade Confederation	Confederación Española de Comercio
ES	CEEES	Spanish Confederation of Services Station Managers	Confederación Española de Empresarios de Estaciones de Servicios
ES	CEGAL	Spanish Booksellers' Association	Confederación Española de Gremios y Asociaciones de Libreros
ES	FANDE	Federation of National Associations of Distributors of Publications	Federación de Asociaciones Nacionales de Distribuidores de Ediciones
ES	FEDEQUIM	The Catalan Chemical Industry Federation	Federación Empresarial Catalana del Sector Químico
ES	FEDIFAR	Healthcare Distribution Federation	Federación de Distribuidores Farmacéuticos
ES	FENPYD	National Federation of Perfumers and Drugstores	Federación Nacional de Perfumistas y Drogueros
ES	La Única	Employers Association of Food and Distribution of Madrid	Asociación Madrileña de Empresarios de Alimentación y Distribución
FI	AKL	Central Organisation of the Car Sector	Autoalan Keskusliitto
FI	APTA	Pharmacy Employers' Association	Apteekkien työnantajaliitto
FI	ARL	Tyre Specialists of Finland	Autonrengasliitto
FI	ETU	The Association of Products and Services Trade	Tuote- ja palvelukaupan yhdistys
FI	Kauppa	Finnish Commerce Federation	Kaupan liitto
FR	CDCF	Retail Council of France	Conseil du commerce de France
FR	CDNA	Professional Union of Non-Food Retailers	Syndicat professionnel des commerces de détail non-

			alimentaires
FR	CGAD	General Confederation of Food Retailers	Confédération Générale de l'Alimentation en Détail
FR	CGI	French Confederation of Wholesale and International Trade	Confédération Française du Commerce de Gros et International
FR	CNPA	National Council of Automotive Professions	Conseil National des Professions de l'Automobile
FR	FCD	Federation of Trade and Distribution	Fédération du commerce et de la distribution
FR	FEC	Federation of Shoe Retailers	Fédération des Enseignes de la Chaussure
FR	Fédération de l'Horlogerie	Federation of Watchmaking	Fédération de l'Horlogerie
FR	FEH	Federation of Clothing Brands	Fédération des Enseignes de l'Habillement
FR	FFC	French Bodywork Federation	Fédération Française de la Carrosserie
FR	FFQ	French Federation of Hardware	Fédération Française de la Quincaillerie
FR	FICIME	Federation of International Mechanic and Electrical Companies	Fédération des Entreprises Internationales de la Mécanique et de l'Electronique
FR	FMB	Federation of DIY Stores and Home Furnishings	Fédération des magasins de bricolage et de l'aménagement de la maison
FR	FNAA	National Federation of Automobile Crafts	Fédération Nationale de l'Artisanat Automobile
FR	FNH	National Federation of Clothing	Fédération Nationale de l'Habillement
FR	FNMJ	National Federation of Gardening Professions	Fédération Nationale des Métiers de la Jardinerie
FR	FNP	National Federation of Photography	Fédération Nationale de la Photographie
FR	GNESA	National Association of Specialised Automobile companies	Groupe National des Entreprises Spécialisées de l'Automobile
FR	Les Professionnels du Pneu	Tyre Professionals	Les Professionnels du Pneu
FR	SNOR	National Union of Opticians	Syndicat National des Opticiens Réunis
FR	UBH	The Union of Jewellery and Watchmaking	L'Union de la Bijouterie et de l'Horlogerie
FR	UCV	Union of City Centre Retailers	Union du Grand Commerce de Centre-Ville
FR	UDO	Union of Opticians	Union des Opticiens
FR	UFIP	French Union of Oil Industries	Union Française des Industries Pétrolières
FR	Union Sport et Cycle	Union Sport and Cycle	Union Sport et Cycle
FR	UPECAD	Professional Union of Non-Store Retailers	Union Professionnelle des Entreprises du Commerce à Distance



HR	HGK	Croatian Chamber of Commerce	Hrvatska Gospodarska Komora
HR	HUP-Udruga trgovine	Croatian Employers' Association, the Association for Commerce	Hrvatska udruga poslodavaca-Udruga trgovine
HU	ÁFEOSZ	Hungarian Federation of Consumer Co-Operative Societies and Trade Associations, ÁFEOSZ-COOP Federation	Általános Fogyasztási Szövetkezetek És Kereskedelmi Társaságok Országos Szövetsége, ÁFEOSZ-COOP Szövetség
HU	KISOSZ	National Federation of Traders and Caterers	Kereskedők És Vendéglátók Országos Érdekképviselői Szövetsége
HU	MNKSZ	Hungarian National Commercial Association	Magyar Nemzeti Kereskedelmi Szövetség
HU	OKSZ	Hungarian Trade Association	Országos Kereskedelmi Szövetség
HU	VOSZ	National Association of Entrepreneurs and Employers	Vállalkozók És Munkáltatók Országos Szövetsége
IE	IBEC Retail Ireland	IBEC Retail Ireland	IBEC Retail Ireland
IE	ISME	Irish SME Association	Irish SME Association
IE	RGDATA	Retail Grocery Dairy & Allied Trades Association	Retail Grocery Dairy & Allied Trades Association
IT	AGCI	General Association of Italian Cooperatives	Associazione Generale Cooperative Italiane
IT	ANCC-COOP	National Association of Consumers' Cooperatives	Associazione Nazionale Cooperative di Consumatori
IT	ANCD CONAD	National Association of Retailers' Cooperatives	Associazione Nazionale Cooperative Dettaglianti
IT	Casartigiani	The Autonomous Confederation of Artisan Unions	Confederazione Autonoma Sindacati Artigiani
IT	Confartigianato	Confartigianato	Confartigianato Imprese
IT	Confcommercio	Italian General Confederation of Companies, Professional Activities, and Self-employment	Confederazione Generale Italiana delle Imprese, delle Attività Professionali e del Lavoro Autonomo
IT	Confesercenti	Italian Confederation of Businesses in the Trade, Tourism, and Service Sectors	Confederazione Italiana Esercenti Attività Commerciali, Turistiche e dei Servizi
IT	CLAAI	Confederation of Italian Associations of Craft Businesses	Confederazione Libere Associazioni Artigianali Italiane
IT	CNA	National Confederation of Craftsmanship and SMEs	Confederazione Nazionale dell'Artigianato e della Piccola e Media Impresa
IT	Federconsumo	Federconsumo	Federconsumo
IT	Federdistribuzione	Federdistribuzione	Federdistribuzione

LT	LPIA	Association of Lithuanian Trade Enterprises	Lietuvos prekybos įmonių asociacija
LU	ADAL	Association of Automobile Dealers in Luxembourg	Association des Distributeurs Automobiles Luxembourgeois
LU	CLC	Luxembourgish Confederation of Trade	Confédération luxembourgeoise du commerce
LU	FDA	Federation of Craftsmen	Fédération des artisans
LU	FEGARLUX	Federation of Garage Owners	Fédération des garagistes
LV	LPTA	Latvian Food Retailers' Association	Latvijas Pārtikas tirgotāju asociācija
LV	LTA	Latvian Traders' Association	Latvijas Tirgotāju asociācija
MT	GRTU	GRTU Malta Chamber of SMEs	GRTU Malta Chamber of SMEs
NL	BOVAG	Federation of Car Traders and Garage Owners	Bond van Automobielhandelaren en Garagehouders
NL	CBL	Central Organisation of Food Retail	Centraal Bureau Levensmiddelenhandel
NL	Dibevo	Association National Organisation Dibevo	Vereniging Landelijke Organisatie Dibevo
NL	Inretail	Inretail	Inretail
NL	MKB-Nederland	Royal Association of Small Businesses in the Netherlands	Koninklijke Vereniging MKB-Nederland
NL	NVCW	Dutch Association of Cooperative Employers	Nederlandse Vereniging van Coöperatieve Werkgevers
NL	RND	Council for Dutch Retail	Raad Nederlandse Detailhandel
NL	Vakcentrum	Trade Centre	Vakcentrum
NL	VGT	Association of Large Food Retailers	Vereniging van Grootwinkelbedrijven Levensmiddelen
NL	VWDHZ	Association of Store Chains in the Do-It-Yourself branch	Vereniging van Winkelketens in de Doe-Het-Zelfbranche
NL	WTG	Employers Technical Wholesale Organisation	Werkgevers Technische Groothandel
PL	FPH	Polish Trade Forum	Forum Polskiego Handlu
PL	PIH	Polish Chamber of Commerce	Polska Izba Handlu
PL	POHiD	Polish Organisation of Commerce and Distribution	Polska Organizacja Handlu i Dystrybucji
PT	ACAP	Automobile Association of Portugal	Associação Automóvel de Portugal
PT	ACB	Association of Commerce of Braga	Associação do Comércio de Braga
PT	ACPorto	Association of Merchants of Porto	Associação dos Comerciantes do Porto
PT	ADIPA	Association of Food Product	Associação dos Distribuidores de

		Distributors	Produtos Alimentares
PT	ANECRA	National Association of Companies in Automobile Commerce and Repair	Associação Nacional das Empresas do Comércio e da Reparação Automóvel
PT	APED	Portuguese Association of Distribution Companies	Associação Portuguesa de Empresas de Distribuição
PT	ARAN	National Association of the Automobile Sector	Associação Nacional do Ramo Automóvel
PT	CCP	Confederation of Trade and Services Portugal	Confederação do Comércio e dos Serviços de Portugal
RO	AMRCR	The Association of Commercial Networks in Romania	Asociația Marilor Rețele Comerciale din România
RO	FRPC	Employers' Federation of Trade Networks	Federația Patronală a Rețelilor de Comerț
SE	Almega	Almega Service Associations & Almega Service Employer Association	Almega (Tjänsteföretagen och Tjänsteförbunden)
SE	KFO	The Co-operative Employers' Association	Arbetsgivarföreningen KFO
SE	Livsmedelsföretagen	The Swedish Food Federation	Livsmedelsföretagen
SE	MAF	The Swedish Motor Trade Employers' Association	Motorbranschens Arbetsgivarförbund
SE	SLA	Forestry and Farmers' Association	Skogs- och Lantarbetsgivarförbundet
SE	Svensk Dagligvaruhandel	Swedish Food Retailers Association	Svensk Dagligvaruhandel
SE	Svensk Handel	The Swedish Trade Federation	Svensk Handel
SE	TeknikGrossisternas Arbetsgivareförening	Technology Wholesale Employers' Association	TeknikGrossisternas Arbetsgivareförening
SI	OZS	Chamber of Craft and Small Businesses of Slovenia	Obrtno-podjetniška zbornica Slovenije
SI	PTZ	Chamber of Small Businesses and Trade, Chamber of Commerce and Industry of Slovenia	Podjetniško-trgovska zbornica, Gospodarska zbornica Slovenije
SI	TZSLO	Slovenian Chamber of Commerce	Trgovinska zbornica Slovenije
SI	ZDS	Association of Employers of Slovenia, Trade Section	Združenje delodajalcev slovenije, Sekcija za trgovino
SK	COOP Jednota	COOP Jednota	COOP Jednota
SK	SAMO	Slovak Association of Modern Commerce	Slovenska aliancia moderného obchodu
SK	ZOCR SR	Slovak Association of Commerce and Tourism	Zväz obchodu a cestovného ruchu SR
UK	BRC	British Retail Consortium	British Retail Consortium

**Table 41: Total companies, employment and employees in the commerce sector (2010, 2015) and commerce sector employment as share of total employment and as proportion of all employees (2015)**

	Number of enterprises		Persons employed		Employees		Total sectoral employment as % of total employment in economy	Proportion of employees as % of total number of employees
GEO/TIME	2010	2015	2010	2015	2010	2015	2015	2015
Country	:	6,205,080	:	32,992,629	:	27,892,082	15.3	15.3
AT	74,437	77,930	616,498	655,210	549,622	582,151	16.1	16.3
BE	143,235	136,451	636,161	631,928	499,841	494,682	14	12.9
BG	141,075	137,970	527,989	496,087	419,793	393,709	16.7	14.9
CY	16,945	16,070	66,064	62,154	60,799	59,074	17.8	19.6
CZ	232,317	241,572	689,822	708,843	506,464	503,251	14.4	12.3
DE	566,481	602,128	5,954,531	6,409,246	5,386,804	5,853,744	16.4	16.6
DK	45,025	41,095	416,386	420,839	397,711	401,518	15.7	16.3
EE	12,853	16,088	82,074	91,345	77,858	86,616	14.9	15.6
EL	286,101	253,167	926,154	639,710	559,262	401,590	18	17.2
ES	763,408	725,880	3,102,207	2,955,041	2,415,956	2,334,542	16.7	15.9
FR	655,762	717,265	3,393,211	3,318,441	3,092,850	2,984,266	12.7	12.9
FI	47,070	43,695	293,965	293,549	270,325	267,615	12.4	13
HR	45,624	37,340	250,642	226,889	225,010	209,205	14.5	15.7
HU	141,433	135,111	560,905	564,332	489,372	494,595	13.5	13.3
IE	46,820	46,626	329,380	345,911	304,601	322,225	17.3	19
IT	1,173,905	1,105,227	3,495,280	3,302,288	1,985,415	1,962,189	15	11.6
LT	49,598	61,054	231,322	254,750	207,986	225,663	19.6	19.7
LU	7,457	7,699	46,023	50,126	44,040	48,375	19.6	21
LV	25,052	28,580	151,546	161,823	149,481	153,663	18.6	20.2
MT	9,677	8,845	28,578	32,404	20,500	24,728	17.8	15.7
NL	193,413	246,561	1,452,373	1,473,526	1,283,525	1,301,131	18.2	19.1
PL	524,847	499,700	2,273,810	2,245,115	1,642,658	1,669,116	14.2	13.3
PT	251,463	222,034	812,944	735,834	662,956	602,178	17.1	16.4
RO	181,903	171,961	887,771	882,621	843,752	836,333	10.7	13.8
SE	127,180	127,894	627,452	656,236	536,133	564,114	14.1	13.3
SI	24,296	26,180	117,843	112,662	105,164	98,616	12.5	12.9
SK	123,168	109,720	372,247	332,899	268,954	249,030	13.8	12.2
UK	357,173	361,237	4,696,801	4,932,820	4,402,533	4,768,163	16.4	18.5

**Table 42: Total enterprises, employment and employees in NACE 45 (2010, 2015)**

	Number of enterprises		Persons employed		Employees	
GEO/TIME	2010	2015	2010	2015	2010	2015
Country	:	839,250	:	3,794,050	:	3,118,164
AT	9,487	10,641	77,654	80,269	68,998	69,996
BE	19,638	19,599	80,929	79,232	62,093	59,453
BG	12,005	13,428	46,625	46,487	37,563	36,484
CY	2,884	2,892	7,781	7,406	6,428	6,480
CZ	33,286	31,673	84,708	83,927	57,901	56,874
DE	99,025	110,537	800,765	839,124	698,800	733,327
DK	7,727	7,553	46,881	52,865	42,749	50,011
EE	2,108	3,106	9,754	11,955	9,125	11,196
EL	27,854	26,987	93,711	55,677	58,259	29,560
ES	70,025	69,141	317,947	279,787	255,466	223,950
FI	9,383	9,434	39,997	43,177	34,532	37,164
FR	81,403	93,486	420,225	381,065	392,057	348,610
HR	5,736	4,993	23,092	21,438	19,450	18,970
HU	19,367	20,372	68,812	69,926	60,073	60,198
IE	7,959	8,621	29,686	33,468	24,416	27,734
IT	119,348	114,780	402,007	359,425	241,115	208,316
LT	6,792	12,100	31,606	37,613	28,772	31,535
LU	710	792	6,772	7,186	6,611	7,032
LV	3,450	4,953	15,956	19,448	15,615	17,983
MT	1,387	1,167	2,859	2,660	1,607	1,660
NL	26,962	33,110	142,256	135,573	117,865	109,150
PL	79,993	88,386	242,706	260,441	150,386	161,257
PT	30,233	28,244	102,963	90,772	86,999	76,077
RO	15,990	17,550	93,839	93,662	90,628	89,803
SE	20,261	21,605	76,118	85,857	64,642	72,668
SI	4,085	4,598	15,099	14,613	12,436	11,606
SK	8,842	8,976	30,779	29,202	23,543	22,519
UK	66,254	70,526	513,419	571,795	461,658	538,551

**Table 43: Total enterprises, employment and employees in NACE 46 (2010, 2015)**

GEO/TIME	Number of enterprises		Persons employed		Employees	
	2010	2015	2010	2015	2010	2015
<b>Country</b>	:	1,797,035	:	10,396,761	:	9,141,679
AT	24,333	25,370	195,550	206,447	177,105	184,947
BE	45,240	41,129	237,257	223,664	195,279	184,429
BG	26,566	27,776	170,107	153,527	152,617	135,826
CY	3,530	3,925	20,529	20,109	20,385	20,065
CZ	70,194	88,987	247,322	276,251	198,550	210,850
DE	142,372	152,848	1,820,505	1,864,927	1,703,994	1,759,903
DK	15,729	15,071	146,106	189,783	143,027	183,550
EE	6,076	6,890	27,477	29,726	25,247	27,396
EL	72,271	63,656	329,005	206,484	250,391	153,795
ES	209,617	205,781	1,071,545	1,029,165	920,388	896,578
FI	15,371	14,226	90,345	87,454	86,005	80,423
FR	152,241	151,375	1,068,044	1,113,901	1,027,751	1,078,603
HR	19,017	15,105	87,457	71,847	80,246	67,455
HU	33,934	32,480	170,072	174,674	159,757	163,213
IE	13,461	13,493	88,612	96,472	84,148	92,246
IT	409,684	384,092	1,200,093	1,121,428	709,277	705,060
LT	7,853	10,430	70,697	78,397	69,719	77,588
LU	3,569	3,653	15,832	18,229	15,326	17,745
LV	7,637	9,228	44,305	47,324	44,060	45,370
MT	2,085	2,097	9,976	11,138	8,766	10,100
NL	73,027	87,488	499,752	502,209	456,277	459,449
PL	113,962	122,028	739,490	743,016	599,424	600,685
PT	66,763	58,818	254,574	221,966	218,820	190,783
RO	53,715	53,040	322,458	316,402	307,586	300,740
SE	47,088	46,025	239,972	250,056	210,818	218,130
SI	13,061	13,619	46,990	42,027	41,021	35,721
SK	55,413	44,683	149,802	123,627	104,611	90,581
UK	103,575	103,722	1,139,465	1,176,511	1,071,069	1,150,448

**Table 44: Total enterprises, employment and employees in NACE 47 (2010, 2015)**

	Number of enterprises		Persons employed		Employees	
<b>GEO/TIME</b>	2010	2015	2010	2015	2010	2015
<b>Country</b>	:	3,568,793	:	18,801,817	:	15,632,238
AT	40,617	41,919	343,294	368,494	303,519	327,208
BE	78,357	75,723	317,975	329,032	242,469	250,800
BG	102,504	96,766	311,257	296,073	229,613	221,399
CY	10,531	9,253	37,754	34,639	33,986	32,529
CZ	128,837	120,912	357,792	348,665	250,013	235,527
DE	325,083	338,742	3,333,262	3,705,195	2,984,010	3,360,515
DK	21,569	18,471	223,399	178,191	211,935	167,957
EE	4,669	6,092	44,842	49,665	43,487	48,024
EL	185,976	162,524	503,439	377,549	250,612	218,236
ES	483,766	450,958	1,712,715	1,646,089	1,240,102	1,214,014
FI	22,316	20,035	163,623	162,917	149,788	150,027
FR	422,117	472,403	1,904,942	1,823,475	1,673,043	1,557,053
HR	20,871	17,242	140,093	133,604	125,314	122,780
HU	88,132	82,259	322,021	319,732	269,542	271,184
IE	25,400	24,512	211,082	215,971	196,037	202,245
IT	644,873	606,355	1,893,180	1,821,435	1,035,023	1,048,813
LT	34,953	38,524	129,019	138,740	109,495	116,540
LU	3,178	3,254	23,419	24,711	22,103	23,598
LV	13,965	14,399	91,285	95,051	89,806	90,310
MT	6,205	5,581	15,743	18,606	10,126	12,967
NL	93,424	125,963	810,365	835,743	709,383	732,531
PL	330,892	289,286	1,291,614	1,241,658	892,848	907,174
PT	154,467	134,972	455,407	423,096	357,137	335,318
RO	112,198	101,371	471,474	472,557	445,538	445,790
SE	59,831	60,264	311,361	320,323	260,673	273,316
SI	7,150	7,963	55,754	56,022	51,707	51,289
SK	58,913	56,061	191,666	180,070	140,800	135,930
UK	187,344	186,989	3,043,917	3,184,514	2,869,806	3,079,164

**Table 45: Characteristics of five largest companies in the sector**

Country	Five largest commerce sector companies	Number of employees	Multinational	Involved in collective bargaining
AT	n/d	n/d	n/d	n/d
BE	Colruyt	16,245	Yes	Yes
	Delhaize De Leeuw	13,008	Yes	Yes
	Carrefour Belgium	8,458	Yes	Yes
	Makro	2,571	Yes	Yes
	Cora	2,104	Yes	Yes
BG	Kaufland Bulgaria EOOD & Co KD	6,500	Yes	No
	Billa Bulgaria EOOD	3,700	Yes	No
	METRO Cash & Carry Bulgaria EOOD	2,300	Yes	No
	Lidl Bulgaria EOOD & Co KD	2,000	Yes	No
	Bulvaria Holding JSC	n/d	No	No
CY	Ermes Group	1,614	No	No
	Papaellinas Emporiki Ltd	1,300	No	No
	Hellenic Supermarkets Sklavenitis	1,200	Yes	No
	Cac Papantoniou Ltd	800	No	No
	Lidl Cyprus	510	Yes	No
CZ	Kaufland Česká republika, v.o.s.	Ca. 25,000	Yes	Yes
	AHOLD Czech Republic, a.s.	17,000	Yes	Yes
	COOP group	Under 14,000	No	yes
	Tesco Stores ČR, a.s.	13,500	Yes	Yes
	Globus ČR, k.s.	5,500	Yes	Yes
DE	Edeka	351,500	Yes	Yes
	Rewe	232,027	Yes	Yes
	Schwarz Gruppe (holding Lidl and Kaufland)	150,000	Yes	Yes
	Metro	56,012 (2017)	Yes	Yes
	Aldi	32,110 (Süd) 35,000 (Nord)	Yes	Yes
DK	Dansk Supermarked	52,000	No	No – a multi-employer agreement
	COOP	43,000	No	Yes



Country	Five largest commerce sector companies	Number of employees	Multinational	Involved in collective bargaining
	DLG	7,065	Yes	No – a multi-employer agreement
	Dagrofa	4,266	Yes	No – a multi-employer agreement
EE	Maxima Eesti OÜ	3,881	Yes	n/d
	Rimi Eesti Food AS	2,732	Yes	n/d
	Selver AS	2,654	No	n/d
	OG Elektra AS (Grossi toidukaubad)	1,215	No	n/d
	Prisma Peremarket AS	986	Yes	Yes
EL	Sklavenitis Group (supermarkets)	23,485*	No	No
	A-B Vasilopoulos (Ahold Group) (supermarkets)	12,700	Yes	No
	Metro AEBE Group (supermarkets)	8,882**	No	No
	Masoutis S.A. (supermarkets)	6,341	No	No
	LIDL Hellas (supermarkets)	4,900	Yes	Yes (only for a part of employees)
ES	El Corte Inglés (NACE 47.19)	80,875	No	No
	Mercadona (NACE 47.11)	74,000	No	Yes
	Carrefour (NACE 47.11)	41,000	Yes	No
	Inditex (NACE 46.42)	39,777	Yes	No
	Eroski (NACE 47.11)	36,432	No	Yes
FI	S Group (S-ryhmä)	32,000 (all sectors, incl. accommodation and food services)	Yes	Yes (managers only, other employees covered by general sectoral agreement)
	Kesko	10,000	Yes	No
	Lidl	5,000	Yes	No
	Stockmann	3,000	Yes	No
	Tokmanni	3,000	No	No
FR	Leclerc	123,000 (2016)	No	n/a
	Carrefour	110,000 (2016)	No	Yes
	Auchan Retail France	72,950 (2016)	No	Yes

Country	Five largest commerce sector companies	Number of employees	Multinational	Involved in collective bargaining
	Intermarché	n/a	No	n/a
	Casino	52,210 (2016)	No	Yes
HR	Konzum d.d.	13,978	Yes	Yes
	Tisak d.d.	4,288	Yes	Yes
	Kaufland Hrvatska d.d.	3,368	Yes	No
	Plodine d.d.	3,315	No	No
	Tommy d.o.o.	2,665	No	No
HU	Tesco Global Áruházak Zrt.	18,500	Yes	No
	Spar Magyarország Kereskedelmi Kft.	13,249	Yes	Yes
	Auchan Magyarország Kft.	6,471	Yes	No
	Metro Kereskedelmi Kft.	2,564	Yes	No
	Lidl Magyarország Bt.	4,346	Yes	No
IE	Musgrave	35,000	Yes	Yes
	Tesco Ireland	14,500	Yes	Yes
	Dunnes Stores	14,000	Yes	No
	Grafton	10,000	Yes	No*
	Paddy Power Betfair	7,300	Yes	No
IT	Coop Italia	54,000	Yes	Yes
	Conad	51,000	Yes	Yes
	Selex	25,000	Yes	Yes
	Esselunga	22,000	No	Yes
	Carrefour	20,000	Yes	Yes
LU	Groupe Cactus	4,030	No	Yes
	La Provençale SARL	1,100	No	No
	Auchan <sup>37</sup>	720	Yes	Yes
	Mercedes Benz Luxembourg	600	Yes	n/a
	Delhaize Luxembourg SA	570	Yes	Yes
LT	Maxima LT	15,576	No	No
	Palink	7,138	Yes	No
	Kesko Senukai Lithuania	3,754	No	No
	Norfos mažmena	3,358	No	No
	Rimi Lietuva	3,351	Yes	Yes
LV	Maxima Latvia Ltd. (retail trade)	7,948	Yes (Lithuania)	Yes

<sup>37</sup> As Auchan has announced several new supermarket openings, it will probably rise to the second rank in the next few years. In October 2017, 150 employees will be hired for the opening of the new site in Onkorn.

Country	Five largest commerce sector companies	Number of employees	Multinational	Involved in collective bargaining
	Rimi Latvia Ltd. (retail trade)	5,462	Yes (Sweden)	Yes
	Depo DIY Ltd.	1,324	No	No
	Lenoka Ltd/Mego (retail trade)	1,093	No	No
	Firma Madara 89 Ltd. (retail trade)	963	No	No
MT	Muscat Motors	250	No	Yes
	Kinds	100	No	Yes
	Gasam Zammit Motors Ltd.	150	No	Yes
	Farsons	372	No	Yes
	General Soft Drinks Co.	600	Yes	Yes (local agreement only)
NL	Ahold (supermarkets and some specialised retail formulas)	80,000 persons (2013)	Yes	Yes, but only for the divisions store management and logistics, respectively
	Jumbo (supermarkets)	31,766 (2015)	No (family business)	Yes, but only for the division logistics
	Detailresult Groep (Dekamarkt & Dirk) (supermarkets)	19,000 persons (2015)	No (family business)	No
	Blokker Holding (several retail formulas for household goods, interior, toys)	17,564 (2015)	Yes	No
	A.S. Watson (Kruidvat, Trekpleister, ICI Paris XL, Pour Vous, Prijsmepper) (health & beauty retailer)	15,000 (2015) (estimate based on the 2015 CSR report)	Yes	No
PL	Jerónimo Martins Polska	60,000	Yes	No
	Tesco	26,000	Yes	No
	Polska Sieć Handlowa Lewiatan	27,000	No	No
	Grupa Muszkieterów	15,500	No	No
	Lidl	15,000	Yes	No
PT	Pingo Doce	22,117	Yes	No
	Modelo Continente	22,115	Yes	No
	Auchan Portugal	7,827	Yes	No
	Lidl Portugal	More than 5,000	Yes	No
	Dia Portugal –Supermercados S.A.		Yes	No

Country	Five largest commerce sector companies	Number of employees	Multinational	Involved in collective bargaining
		3,444		
RO	Kaufland Romania S.C.S	13,263 (figure available for 2015. Source: A Business Magazine publication analysis, based on the National Trade Register Office data).	Yes (Kaufland Germany)	Yes – Workers' Union of S.C. Kaufland Romania S.C.S No further information available
	Auchan Romania SA	9,430 (figure available for 2015. Source: A Business Magazine publication analysis, based on the National Trade Register Office data).	Yes (Auchan France)	No union
	Mega Image SRL	8,077 (figure available for 2015. Source: A Business Magazine publication analysis, based on the National Trade Register Office data).	Yes (Delhaize Group)	No information about collective bargaining
	Carrefour România SA	7,985 (figure available for 2015. Source: A Business Magazine publication analysis, based on the National Trade Register Office data)	Yes (Carrefour France)	Carrefour Romania employee trade union Negotiations Salary increases
	Metro Cash & Carry	4,576 (figure available for 2015. Source: A Business Magazine publication analysis, based on the National Trade Register Office data).	Yes (Metro Cash & Carry Germany)	National Solidarity Trade Union Salary <a href="#">Increases</a>
SE	H&M Hennes & Mauritz GBC AB*	161,000 (globally). Estimated to be the biggest employer in Sweden.	Yes	No (sectoral and local)
	Ikea Svenska Försäljnings AB*	163,600 (globally)	Yes	No (sectoral and local)
	ICA Sverige AB*	8,000	Yes	No (sectoral and local)

Country	Five largest commerce sector companies	Number of employees	Multinational	Involved in collective bargaining
	Willy's AB*	4,500	Yes	No (sectoral and local)
	H & M Hennes & Mauritz Sverige AB*	No data available	Yes	No (sectoral and local)
SI	Mercator d.d.	8,901	Yes	Yes
	Spar Slovenija d.o.o.	4,216	Yes	No
	Petrol d.d.	1,439	No	Yes
	Lidl SLO d.o.o.	1,326	Yes	No
	Hofer trgovina d.d.	1,074	Yes	No
SK	COOP Jednota	14,186	No	Yes
	Tesco Stores	10,000	Yes	Yes
	Kaufland	5,500	Yes	No
	Billa	4,000	Yes	Yes
	Lidl	3,300	Yes	No
UK	Tesco's	460,000	Yes	Yes (partnership agreement)
	Asda	165,000	Yes	Yes, covering some parts of the business
	Marks & Spencer	84,939	Yes	No
	John Lewis	86,700	No	No
	Sainsbury's	51,900	No	Yes

*Note: \*Some of the member companies of the Grafton group have collective agreements but there is no group-wide agreement*

**Table 46: Collective bargaining, sector coverage, sector organisation, membership, consultation and affiliations of trade unions in the commerce sector, 2015–2017**

	Name	Sector coverage	Sector organisation	Total union members in sector	Involvement in collective bargaining ME = Multi-employer SE	Number of workers covered	Consultation	Regularity of consultation	Membership of UniEuropa	Membership of other EU trade union organisation
AT	GPA-djp	45,46, 47, 47.9	Sectional overlap	n/d	ME	440,000	Yes	Ad hoc and regular	Yes	EFFAT, EFJ, EPSU
AT	PRO-GE	45	Sectional overlap	n/d	ME	15,000		Ad hoc	No	EFFAT, ETUC, IndustriALL
AT	VAAÖ	47	Sectionalism	2,620	ME	4,228	Yes		No	
AT	vida	45, 46, 47, 47.9	Sectional overlap	n/d	SE, ME	122,000	Yes	Ad hoc	Yes	EFFAT, EPSU, ETF, ETUC
BE	ABVV/FGTB Horval	46, 47, 47.9	Sectional overlap	n/d	SE, ME	n/d	Yes		No	EMF, ETUC
BE	(ABVV-FGTB) MWB	45	Sectional overlap	n/d	SE, ME	n/d	Yes		No	EMF, ETUC
BE	ABVV-Metaal	45	Sectional overlap	n/d	SE, ME	n/d	Yes		No	EMF, ETUC
BE	ACLVB/CGSLB	45, 46, 47, 47.9	Sectional overlap	21,000	SE, ME	21,000	Yes	Ad hoc	Yes	EFFAT
BE	ACV-CSC METEA	45	Sectional overlap	n/d	SE, ME	n/d	Yes		No	EMF, ETUC
BE	ACV-Voeding en Diensten, CSC-Alimentation et	46, 47, 47.9	Sectional overlap	10,636	SE, ME	35,143	Yes	Ad hoc	Yes	EFFAT

	Name	Sector coverage	Sector organisation	Total union members in sector	Involvement in collective bargaining ME = Multi-employer SE	Number of workers covered	Consultation	Regularity of consultation	Membership of UniEuropa	Membership of other EU trade union organisation
	Services									
BE	BBTK/SETCa		Sectional overlap	n/d	SE, ME				Yes	
BE	CNE		Sectional overlap	n/d	SE, ME	379,219	Yes		Yes	ETUC, Eurocadres
B G	ITUFECCCTCS	45, 46, 47, 47.9	Sectional overlap	800	SE, ME		Yes	Ad hoc	No	None
BE	LBC/NVK	45, 46, 47, 47.9	Sectional overlap	n/d	SE, ME	379,219	Yes		Yes	ETUC, Eurocadres
B G	NFSCSCT Podkrepa Services Union	46, 47, 47.9	Sectional overlap	50	SE, ME		No		No	EPSU
C Y	OBIK-SEK	45	Sectional overlap	723		830	No		Yes	EFFAT, IndustriALL
C Y	OIK-SEK	46, 47, 47.9	Sectional overlap	350	SE	1,400	Yes	Ad hoc and regular	Yes	UISTAACT
C Y	OMEPEGE-SEK	46, 47, 47.9	Sectional overlap	85	SE, ME	150	Yes	Ad hoc	No	EFFAT, ETF
CZ	OSPO	46, 47	Sectional overlap	n/d	SE, ME	50,000	Yes	Ad hoc and regular	Yes	ETUC

	Name	Sector coverage	Sector organisation	Total union members in sector	Involvement in collective bargaining ME = Multi-employer SE	Number of workers covered	Consultation	Regularity of consultation	Membership of UniEuropa	Membership of other EU trade union organisation
CY	SEGDAMELIN-PEO	46, 47	Sectional overlap	412	SE, ME	600	Yes	Ad hoc	No	EFFAT, UISTAACT
CY	SEMMHK-PEO	45	Sectional overlap	137	SE, ME	810	No		No	
DE	CGM	45	Sectional overlap	n/d	ME	n/d			No	CESI
DE	DHV		Sectional overlap	n/d	SE, ME	n/d			No	CESI
DE	IG Metall	45	Sectional overlap	n/d	SE, ME	around 30%	Yes	Ad hoc	No	IndustriALL
DE	ver.di	45, 46, 47, 47.9	Overlap	n/d	SE, ME	More than 90%	Yes	Ad hoc	Yes	
DK	Dansk Metal	45	Sectional overlap	10,979	ME	13,000	Yes	Ad hoc	No	IndustriALL
DK	Fagligt Fælles Forbund, 3F	45, 46, 47	Sectional overlap	1,700	SE, ME	2,000	Yes	Ad hoc	Yes	EFBWW, EFFAT, ESPU, ETF, IndustriALL
DK	HK	45, 46, 47	Sectional overlap	n/d	SE, ME	150,000	Yes	Ad hoc	Yes	
DK	Malerforbundet	45	Sectional overlap	585	ME	1,270	Yes	Ad hoc	No	EFBWW, IndustriALL
DK	NNF	46, 47	Sectional overlap	3,800	ME	4,000	Yes	Ad hoc	Yes	
EE	ESTAL	45, 46, 47, 47.9	Overlap	416	SE	416	No		Yes	
EE	ETKA	45, 46, 47, 47.9	Overlap	1,190	SE	2,506	Yes	Ad hoc and regular	Yes	
EL	OIYE	45, 46, 47, 47.9	Sectional overlap	36,647	ME	n/d	No		Yes	
EL	Trade Union of Estee Lauder	47	Sectionalism	164	SE	660	No		No	



	Name	Sector coverage	Sector organisation	Total union members in sector	Involvement in collective bargaining ME = Multi-employer SE	Number of workers covered	Consultation	Regularity of consultation	Membership of UniEuropa	Membership of other EU trade union organisation
	Employees									
EL	Trade Union of Lidl Employees	47	Sectionalism	426	SE	2,500	No		No	
ES	CCOO-Industria	47	Sectional overlap	6,800	SE, ME	58,000			No	EFFAT, IndustriALL
ES	CCOO-Servicios	46, 47	Sectional overlap	50,000	SE, ME	1,700,000	Yes	Ad hoc	Yes	EFFAT
ES	CIG Servizio	47	Sectional overlap	n/d	SE, ME	n/d			No	
ES	ELA-Zerbitzuak	47	Sectional overlap	5,800	SE, ME	35,000	No		Yes	
ES	FASGA	47	Sectional overlap	41,000	SE, ME	300,000	Yes		No	CESI
ES	FeSMC-UGT	45, 46, 47	Sectional overlap	n/d	SE, ME	n/d			Yes	
ES	FETICO	47	Sectional overlap	n/d	SE, ME	n/d			No	
ES	FICA-UGT	45, 46, 47	Sectional overlap	n/d	SE, ME	n/d			Yes	
ES	USO	45, 46, 47	Sectional overlap	3,200	SE, ME	70,000	No		No (but negotiating membership)	ETUC
FI	ILRY	45, 46, 47	Sectional overlap	2,000	SE, ME	n/d			Yes	Eurocadres, IndustriALL
FI	PAM	46, 47, 47.9	Sectional overlap	72,000	ME	185,000	Yes	Regular	Yes	
FI	PRO	45	Sectional overlap	3,000	ME	5,000	Yes	Ad hoc	No	IndustriALL
FI	SFL	46, 47, 47.9	Sectional overlap	4,002	ME	4,496	Yes	Regular	No	
FI	SOA/ERTO	46, 47,	Sectional overlap	950	ME	1,100	Yes	Ad hoc	No	ETF

	Name	Sector coverage	Sector organisation	Total union members in sector	Involvement in collective bargaining ME = Multi-employer SE	Number of workers covered	Consultation	Regularity of consultation	Membership of UniEuropa	Membership of other EU trade union organisation
		47.9								
FI	TEAM	45	Sectional overlap	620	ME	1,200	Yes	Ad hoc	No	IndustriALL
FI	Teollisuusliitto	45	Sectional overlap	9,000	ME	26,000	Yes	Ad hoc	No	IndustriALL
FI	YTN	45, 46, 47, 47.9	Sectional overlap	15,000	SE, ME	n/d	No		No	
FR	CFDT	46, 47, 47.9	Sectional overlap	40,000	SE, ME	n/d	Yes	Regular	Yes	
FR	CFDT-Cadres	45, 46, 47, 47.9	Sectional overlap	n/d	No	n/a	No		Yes	
FR	CFE-CGC Agroalimentaire	46, 47, 47.9	Sectional overlap	4,686	SE, ME	1,478,000	Yes	Ad hoc	No	EFFAT
FR	CFE-CGC Métallurgie	45	Sectional overlap	n/d	SE, ME	399,500			No	IndustriALL
FR	CFTC CSFV	46, 47	Sectional overlap	n/d	SE, ME	n/d			n/d	
FR	CFTC Métallurgie	45	Sectional overlap	n/d	SE, ME	399,500	Yes	Ad hoc	No	IndustriALL
FR	CGT Commerce	46, 47, 47.9	Sectional overlap	n/d	SE, ME	n/d	Yes	Ad hoc	Yes	
FR	FEC-FO	46, 47, 47.9	Sectional overlap	n/d	SE, ME	n/d			Yes	
FR	FGA-CFDT	46, 47	Sectional overlap	n/d	SE, ME	n/d	Yes	Ad hoc	No	EFFAT
FR	FGMM-CFDT	45, 47	Sectional overlap	1,500	SE, ME	399,500	No		No	IndustriALL
FR	FGTA-FO	46, 47	Sectional overlap	n/d	SE, ME	n/d			Yes	EFFAT

Representativeness of the European social partner organisations: Commerce sector

	<b>Name</b>	<b>Sector coverage</b>	<b>Sector organisation</b>	<b>Total union members in sector</b>	<b>Involvement in collective bargaining ME = Multi-employer SE</b>	<b>Number of workers covered</b>	<b>Consultation</b>	<b>Regularity of consultation</b>	<b>Membership of UniEuropa</b>	<b>Membership of other EU trade union organisation</b>
FR	FNAF-CGT	46, 47	Sectional overlap	n/d	SE, ME	n/d			No	
FR	FNECS CFE-CGC	46, 47, 47.9	Sectional overlap	n/d	SE, ME	n/d			n/d	
FR	FO Métaux	45, 47	Sectional overlap	n/d	SE, ME	399,500			No	IndustriALL
FR	FTM-CGT	45, 47	Sectional overlap	n/d	SE, ME	399,500			No	IndustriALL
FR	UNSA	46, 47, 47.9	Sectional overlap	n/d	SE	n/d			No	
H R	STH	45, 46, 47, 47.9	Sectional overlap	11,000	SE, ME	20,000	No		Yes	ETUC
H U	KASZ	46, 47, 47.9	Sectional overlap	15,000	Yes	60,636	Yes	Ad hoc	Yes	No
H U	KDFSZ	47	Sectional overlap	n/d	No	n/a				
IE	Mandate	45, 46, 47, 47.9	Sectional overlap	40,000	SE	30,000	Yes	Ad hoc	Yes	
IE	SIPTU	45, 46, 47, 47.9	Sectional overlap	9,750	SE, ME	2,500	Yes	Ad hoc	No	EFFAT, ETF, ETUC
IT	FILCAMS-CGIL	45, 46, 47, 47.9	Overlap	215,893	SE, ME	n/d	Yes	Regular	Yes	EFFAT
IT	FIM-CISL	45	Sectional overlap	15,684	SE, ME	9,000	Yes	Regular	No	IndustriALL
IT	FIOM-CGIL	45	Sectional overlap	n/d	SE, ME	90,000	Yes	Regular	No	IndustriALL

	<b>Name</b>	<b>Sector coverage</b>	<b>Sector organisation</b>	<b>Total union members in sector</b>	<b>Involvement in collective bargaining ME = Multi-employer SE</b>	<b>Number of workers covered</b>	<b>Consultation</b>	<b>Regularity of consultation</b>	<b>Membership of UniEuropa</b>	<b>Membership of other EU trade union organisation</b>
IT	FISASCAT-CISL	45, 46, 47, 47.9	Overlap	n/d	SE, ME	n/d	Yes	Regular	Yes	EFFAT, ETLC
IT	UILM	45	Sectional overlap		SE, ME		Yes	Regular	No	IndustriALL
IT	UILTuCS-UIL	45, 46, 47, 47.9	Overlap	n/d	SE, ME	n/d	Yes	Regular	Yes	EFFAT
LT	LKKDPS	47	Sectional overlap	800	No	n/a	Yes	Ad hoc	Yes	
LT	LPSDPS	47	Sectional overlap	200	SE	790	Yes	Ad hoc	Yes	
LT	SAMPRO	47	Sectional overlap	n/d	SE	n/d	Yes	Ad hoc		
LU	Garages LCGB-ASG	45	Sectional overlap	6,000	SE, ME	6,000	Yes	Ad hoc	No	IndustriALL
LU	LCGB commerce, food processing and catering	46, 47, 47.9	Sectional overlap	5,000	SE	11,500	Yes	Ad hoc	Yes	
LU	OGBL	45, 46, 47, 47.9	Congruence	10,000	SE, ME	14,000	Yes	Ad hoc	Yes	ETUC
LV	LTDA	45, 46	Sectional overlap	1,734	SE	15,410	Yes	Regular	Yes	
MT	GWU	45, 46, 47, 47.9	Sectional overlap	41,921	SE	n/d	Yes	Ad hoc	Yes	EFBWW, EFFAT, EFT, EMF, EPSU, ETUC
MT	UHM Voice of the Workers	45, 46, 47	Overlap	3,864	SE		Yes		No	ETUC, EZA
NL	CNV Vakmensen	45, 46, 47,	Overlap	20,000	SE, ME	1,280,000	Yes	Ad hoc	Yes	ETUC, IndustriALL

	Name	Sector coverage	Sector organisation	Total union members in sector	Involvement in collective bargaining ME = Multi-employer SE	Number of workers covered	Consultation	Regularity of consultation	Membership of UniEuropa	Membership of other EU trade union organisation
		47.9								
NL	FNV	45, 46, 47, 47.9	Overlap	60,000	SE, ME	575,000	Yes	Ad hoc	Yes	ETUC, IndustriALL
NL	LBV	45, 46, 47, 47.9	Overlap	1,750	SE, ME	25,000	No		No	
NL	VCP (formerly 'De Unie MHP')	45, 46, 47, 47.9	Overlap	n/d	SE, ME	250,000	No		No	
NL	VHP	47	Sectionalism	70	SE	320	No		No	
NL	W.I.M.	47, 47.9	Sectionalism	750	SE	5,000	No		No	
PL	FZZPSPHiU	47	Sectional overlap	n/d	SE	22,000	Yes	Ad hoc	No	
PL	NSZZ Solidarność	45, 46, 47, 47.9	Congruence	15,000	SE	n/d	Yes	Ad hoc	Yes	
PT	CESP	45, 46, 47, 47.9	Overlap	n/d	SE, ME	200,000			No	
PT	SITESE	45, 46, 47, 47.9	Overlap	3,388	ME	77,000			Yes	
RO	FSC	45, 46, 47	Congruence	13,000	SE	13,000	No		Yes	
SE	AHT	45, 46, 47, 47.9	Sectional overlap	n/d	ME	n/d	No		Yes	

	Name	Sector coverage	Sector organisation	Total union members in sector	Involvement in collective bargaining ME = Multi-employer SE	Number of workers covered	Consultation	Regularity of consultation	Membership of UniEuropa	Membership of other EU trade union organisation
SE	Farmacieförbundet		Sectional overlap							
SE	Handels	45, 46, 47, 47.9	Sectional overlap	14,000	ME	300,000	Yes	Regular	Yes	
SE	IF Metall	45	Sectional overlap	15,836	ME	20,000	Yes	Ad hoc	No	
SE	Lederana	45, 46, 47, 47.9	Sectional overlap	7,000	ME	2,000	No		No	CEC European managers
SE	Sveriges Farmaceuter	47	Sectional overlap	4,000	ME	10,500	Yes	Regular	No	Pharmaceutical care network Europe
SE	Unionen	45, 46, 47, 47.9	Sectional overlap	93,000	ME	100,000	Yes	Ad hoc	Yes	
SI	SDTS	45, 46, 47, 47.9	Congruence	17,450	SE, ME	100%	Yes	Regular	No	ETUC
SI	SGS	45, 46, 47, 47.9	Sectional overlap	n/d	SE, ME	100% but trade union not a signatory	Yes	Ad hoc	No	
SI	STS-KS 90	45, 46, 47, 47.9	Congruence	5,000	No bargaining	100% but trade union not a signatory	Yes	Regular	No	
SK	OZPOCR	45, 46, 47, 47.9	Sectional overlap	10,000	SE, ME	21,500	Yes	Regular	Yes	

	Name	Sector coverage	Sector organisation	Total union members in sector	Involvement in collective bargaining ME = Multi-employer SE	Number of workers covered	Consultation	Regularity of consultation	Membership of UniEuropa	Membership of other EU trade union organisation
U K	GMB	47, 47.9	Sectional overlap	n/d	SE	n/d	Yes		Yes	
U K	Unite	45, 47	Sectional overlap	n/d	SE	n/d	Yes		Yes	
U K	USDAW	45, 46, 47, 47.9	Overlap	364,003	SE	725,610	Yes	Ad hoc	Yes	

**Table 47: Collective bargaining, sector coverage, sector organisation, membership, consultation and affiliations of employer organisations in the commerce sector, 2015–2017**

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
AT	FGTS	47	Sectional overlap	1,500	10,000	Multi-employer bargaining			No	
	ÖAV	47	Sectionalism	1,350	11,000	Multi-employer bargaining	Yes	Ad hoc	No	PGEU
	WKÖ BGA	45, 46, 47, 47.9	Sectionalism	2,561	7,621	No bargaining	Yes	Ad hoc	Yes	
	WKÖ BGHADP	46, 47	Sectionalism	3,278	31,017	Multi-employer bargaining	Yes	Ad hoc and regular	Yes	FECC, FEPD
	WKÖ BIF	45	Sectionalism	5,000	20,000	Multi-employer bargaining			No	
	WKÖ BSH	45, 46, 47, 47.9	Sectionalism	67,000	540,000	Multi-employer bargaining	No		Yes	

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
BE	Comeos	46, 47, 47.9	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes		Yes	CIES, DSE, FRUCOM
	FGBB	46, 47	Sectionalism	30	18,000	Multi-employer bargaining	Yes		No	CECRA
	Grymafer	46	Congruence	65	1,500	No bargaining	Yes		No	Eurometal. net
	NUHOS/ UNEBO	46, 47	Sectional overlap	340	3,600	Multi-employer bargaining	Yes		No	ENFE, ETTF
	OPHACO	46	Sectional overlap	13 member companies with 600 pharmacies	1,153	Multi-employer bargaining	Yes		No	European Union of the Social Pharmacies (EUSP) Employed Community Pharmacists in Europe (EPHeU)
	Traxio	45	Sectionalism	9,724	n/d	Multi-employer bargaining	Yes		No	
	UCM	45, 47, 47.9	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		No	UEAPME
	UNIZO	45, 47, 47.9	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes	Regular	No	UEAPME
BG	AMT	46, 47, 47.9	Sectionalism	12	22,071	No bargaining			Yes	
	KEBE	45, 46, 47, 47.9	Overlap	4,000	n/d	No bargaining	Yes		Yes	
CZ	AČTO	46, 47	Sectional overlap	8	30,000	No bargaining	Yes	Ad hoc and regular	No	IRE



Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
	APEK	46, 47	Sectional overlap	420	n/d	No bargaining	Yes	Ad hoc	No	Ecommerce Europe
	SEMO	45	Sectional overlap	20	1,200	Multi-employer bargaining	Yes	Ad hoc	No	ACEA
	SOCR ČR	45, 46, 47	Overlap	25	120,000	Single-employer bargaining, multi-employer bargaining	Yes	Ad hoc and regular	Yes	HOTREC, IRE
DE	BGA		Sectional overlap	125,000	n/d	Multi-employer bargaining	Yes	Ad hoc	Yes	BusinessEurope
	HDE	45, 46, 47, 47.9	Congruence	100,000	n/d	Multi-employer bargaining	Yes	Ad hoc	Yes	BusinessEurope
	ZDK	45	Sectionalism	n/d	n/d	Multi-employer bargaining			No	UEAPME
DK	ABAF	45	Sectionalism	n/d	n/d	Multi-employer bargaining			No	
	BA	46	Sectionalism	380	5,600	Multi-employer bargaining	No		No	
	Dansk Erhverv	45, 46, 47	Overlap	6,500	75,000	Multi-employer bargaining	Yes	Ad hoc	Yes	Euro-CIETT, CLECAT
	DI	45, 46, 47	Overlap	n/d	n/d	Multi-employer bargaining	Yes	Ad hoc	No	BusinessEurope
	SKAD	45	Sectionalism	n/d	n/d	Multi-employer bargaining	No		No	Eurogarant

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
EE	AMTEL	45	Overlap	39	2,500				No	ACEA
	EEL	46, 47, 47.9	Sectional overlap	151	n/d	No bargaining	Yes	Ad hoc	No	EMOTA
	EKL	45, 46, 47, 47.9	Overlap	52	26,000	No bargaining	Yes	Ad hoc	Yes	
	EKTK	45, 46, 47, 47.9	Overlap	1,187	51,158	No bargaining	Yes	Ad hoc	No	
EL	GSEVEE	45, 46, 47	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes	Ad hoc	No	UEAPME
	ESEE	45, 46, 47, 47.9	Sectional overlap	150,000	300,000	Multi-employer bargaining	Yes	Ad hoc	Yes	UEAPME
	SELPE	47, 47.9	Sectional overlap	120	120,000	No bargaining	Yes	Ad hoc	Yes	
ES	ACES	46, 47	Sectionalism	12	n/d	No bargaining			Yes	
	AECQ	46	Sectionalism	1,700	n/d	Multi-employer bargaining			No	
	AEFI	47	Sectionalism	n/d	n/d	Multi-employer bargaining	No		No	FEUPF
	AEVECA R	47	Sectionalism	n/d	n/d	Multi-employer bargaining	No		No	
	AGES	47	Sectionalism	n/d	n/d	Multi-employer bargaining	No		No	
	ANGED	46, 47	Sectionalism		20	Multi-employer bargaining	Yes	Ad hoc	Yes	

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
	ASEDAS	46, 47	Sectionalism		150	No bargaining	Yes	Ad hoc and regular	Yes	
	CEC	47	Sectionalism		450,000	Multi-employer bargaining	Yes	Ad hoc and regular	No	
	CEEES	47	Sectionalism	n/d	n/d	Multi-employer bargaining			No	
	CEGAL	47	Sectionalism	1,600	n/d	Multi-employer bargaining	No		No	EIBF
	FANDE	46	Sectionalism		200	Multi-employer bargaining	No		No	
	FEDEQUIM	46	Sectionalism	n/d	n/d	Multi-employer bargaining	No		No	BusinessEurope
	FEDIFAR	46	Sectional overlap	40	7,000	Multi-employer bargaining	No		No	
	FENPYD	47	Sectionalism	700	12,000	Multi-employer bargaining	No		No	
	La Única	46, 47	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes		No	
FI	AKL	45	Sectional overlap	500	19,000	Multi-employer bargaining	Yes	Regular	No	CECRA
	APTA	47, 47.9	Sectionalism	620	6,500	Multi-employer bargaining	Yes		No	
	ARL	45	Sectional overlap	70	1,450	Multi-employer	Yes	Regular	No	

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
						bargaining				
	Kauppa	46, 47, 47.9	Sectionalism	2,200	100,000	Single-employer bargaining, multi-employer bargaining	Yes	Regular	Yes	
FI	ETU	45, 46, 47	Sectional overlap	n/d	n/d	n/d	n/d		Yes	
FR	CDCF	46, 47, 47.9	Sectionalism	29 professional federations	n/d	No bargaining	Yes	Ad hoc	Yes	
	CDNA	46, 47, 47.9	Sectionalism	1,851	14,344	Multi-employer bargaining	Yes	Ad hoc	Yes	
	CGAD	47	Sectional overlap	10 professional associations	n/d	Multi-employer bargaining	Yes		No	UEAPME
	CGI	46	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes	Ad hoc	Yes	
	CNPA	45	Sectional overlap	10 professional associations	n/d	Multi-employer bargaining	Yes		No	UEAPME
	FCD	46, 47, 47.9	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes	Ad hoc	Yes	
	FEC	47, 47.9	Sectionalism	n/d	14,000	Multi-employer bargaining			No	
	Fédération de l'Horloger	46, 47	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes		Yes	

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
	ie									
	FEH	47, 47.9	Sectionalism	60	n/d	Multi-employer bargaining	Yes		Yes	
	FFC	45	Sectionalism	n/d	n/d	Multi-employer bargaining			No	UEAPME
	FFQ	46, 47, 47.9	Sectionalism	n/d	n/d	Multi-employer bargaining			Yes	
	FICIME	46	Sectionalism	n/d	n/d	Multi-employer bargaining			Yes	
	FMB	47, 47.9	Sectionalism	n/d	n/d	Multi-employer bargaining			Yes	
	FNAA	45	Sectionalism	3,000	15,121	Multi-employer bargaining	Yes		No	
	FNH	47, 47.9	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes		Yes	
	FNMJ	47, 47.9	Sectionalism	6	n/d	Multi-employer bargaining	Yes		Yes	
	FNP	47, 47.9	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes		Yes	
	GNESA	45	Sectionalism	n/d	n/d	Multi-employer bargaining				
	UBH	47	Sectionalism	850	12,000	Multi-employer bargaining	Yes	Ad hoc	No	World Jewellery Confederation

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
	UCV	47, 47.9	Sectionalism	13	60,000	Multi-employer bargaining	Yes	Ad hoc	No	
	UDO	47, 47.5	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes		Yes	
	UFIP	46, 47	Sectional overlap	9	n/d	Multi-employer bargaining	Yes		Yes	
	Union Sport et Cycle	47	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		Yes	
	UPECAD	47, 47.9	Sectionalism	n/d	n/d	Multi-employer bargaining			Yes	
	SNOR	47, 47.9	Sectionalism	n/d	n/d	Multi-employer bargaining	Yes		Yes	
HR	HUP-Udruga trgovine	45, 46, 47, 47.9	Congruence	5,000	60,000	Single-employer bargaining	No		Yes	
HU	ÁFEOSZ	47, 47.9	Sectionalism	8,300	28,000	No bargaining	Yes	Regular	No	EUROCO OP
	KISOSZ	47, 47.9	Sectionalism	3,000	60,000	No bargaining	Yes	Regular	No	UEAPME

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
	MNKSZ	n/d	n/d	n/d	n/d	n/d	n/d	n/d	n/d	n/d
	OKSZ	45, 46, 47, 47.9	Sectional overlap	4,500	300,000	No bargaining	Yes	Ad hoc	Yes	
	VOSZ	45, 46, 47, 47.9	Sectional overlap	5,300	100,000	No bargaining	Yes	Regular	Yes	
IE	IBEC Retail Ireland	46, 47, 47.9	Sectionalism	n/d	n/d	Single-employer bargaining	Yes	Regular	Yes	BusinessEurope
	ISME		Sectional overlap			n/d				
	RGDATA		Sectional overlap			n/d				
IT	AGCI	45, 46, 47, 47.9	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes	Ad hoc	No	
	ANCC-COOP	46, 47, 47.9	Sectionalism	90	54,000	Multi-employer bargaining	Yes	Ad hoc	No	EUROCOOP
	ANCD CONAD	46, 47, 47.9	Sectional overlap	2,700	51,000	Multi-employer bargaining	Yes	Ad hoc	No	Independent Retail Europe
	Casartigiani	45	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		No	
	Confartigianato	45	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		No	
	Confcommercio	45, 46, 47, 47.9	Overlap	300,000	1,200,000	Single-employer bargaining, multi-employer	Yes	Ad hoc	Yes	

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
						bargaining				
	Confesercenti	45, 46, 47, 47.9	Overlap	n/d	n/d	Single-employer bargaining, multi-employer bargaining	Yes	Ad hoc	No	Enterprises Europe network
	CLAAI	45	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		No	
	CNA	45	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		No	
	Federcons umo	46, 47	Sectional overlap	576	9,000	Multi-employer bargaining	Yes	Ad hoc	No	
	Federdistribuzione	46, 47, 47.9	Sectionalism	200	220,000	Multi-employer bargaining	Yes	Ad hoc	Yes	
LT	LPIA	45, 46, 47	Overlap	18	30,000	No bargaining	Yes	Ad hoc		
LU	ADAL	45	Sectionalism	60	3,000	Multi-employer bargaining	Yes	Regular	Yes	CECRA
	CLC	45, 46, 47, 47.9	Sectional overlap	4,000	28,000	No bargaining	Yes	Ad hoc	Yes	
	FDA	45, 46, 47	Sectional overlap	8	7,500	No bargaining	Yes	Ad hoc	No	UEAPME
	FEGARLUX	45	Sectionalism	130	3,000	Multi-employer bargaining	Yes	Regular	No	CECRA
LV	LPTA	46, 47	Sectionalism	3	13,500	Single-employer bargaining	Yes	Regular	Yes	



Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
	LTA	46, 47	Sectional overlap	105	n/d	Single-employer bargaining		Regular	Yes	
MT	GRTU	45, 46, 47, 47.9	Sectional overlap	n/d	n/d	No bargaining	Yes	Regular	Yes	UEAPME
NL	BOVAG	45	Sectional overlap	7,500	70,000	Multi-employer bargaining	Yes	Ad hoc	No	CECRA
	CBL	46, 47	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		Yes	
	Dibevo	46, 47, 47.9	Sectional overlap	1,100	n/d	Single-employer bargaining, multi-employer bargaining	No		No	EPO
	Inretail	47	Sectionalism	n/d	n/d	Multi-employer bargaining			Yes	
	MKB-Nederland	45, 46, 47	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		Yes	
	NVCW	47	Sectional overlap	157	5,384	Multi-employer bargaining	No		No	
	RND	47	Sectional overlap			Multi-employer bargaining	Yes	Ad hoc	Yes	
	Vakcentrum	47	Sectionalism	2,800	200,000	Multi-employer bargaining	Yes	Regular	Yes	UEAPME
	VGT	47, 47.9	Sectionalism	18	27,500	Multi-employer bargaining	Yes	Ad hoc	Yes	
	VWDHZ	47, 47.9	Sectionalism	6	17,000	Multi-employer bargaining	Yes	Ad hoc	Yes	

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
	WTG	46	Sectionalism	n/d	n/d	Single-employer bargaining, multi-employer bargaining	Yes		Yes	
PL	FPH	45, 46, 47, 47.9	Congruence	12	n/d	No bargaining	Yes	Ad hoc	No	
	PIH	45, 46, 47, 47.9	Sectional overlap	n/d	n/d	n/d			No	
	POHiD	45, 46, 47, 47.9	Sectionalism	14	200,000	No bargaining	Yes	Ad hoc	Yes	
PT	ACAP	45	Sectional overlap	2,000	n/d	Multi-employer bargaining			No	ACEA
	ACB	47	Sectional overlap	585	5,872	Single-employer bargaining, multi-employer bargaining	Yes	Regular	Yes	
	ACPorto	46, 47, 47.9	Sectionalism	13,717	45,600	Multi-employer bargaining	Yes	Regular	Yes	
	ADIPA	46, 47, 47.9	Sectional overlap	273	11,785	Multi-employer bargaining	Yes	Regular	Yes	
	ANECRA	45	Sectionalism	n/d	n/d	Multi-employer bargaining			No	CECRA
	APED	45, 46, 47, 47.9	Sectionalism	131	85,000	Multi-employer bargaining	Yes	Ad hoc and regular	Yes	
	CCP	45, 46, 47	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes		Yes	

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
RO	AMRCR		Sectionalism	16	79,000	No bargaining	Yes	Ad hoc	Yes	
	FRPC	46, 47, 47.9	Sectionalism	18	108,000	No bargaining	Yes	Ad hoc	Yes	
SE	Almega	46	Sectional overlap	n/d	300	Multi-employer bargaining	No		No	
	KFO	46, 47, 47.9	Sectional overlap	n/d	n/d	Multi-employer bargaining	Yes	Ad hoc	No	CEEP
	Livsmedelsföretagen	46, 47	Sectional overlap	60	500	Multi-employer bargaining	Yes	Ad hoc	No	FoodDrink Europe
	MAF	45, 47	Sectionalism	n/d	n/d	Multi-employer bargaining	No		No	
	SLA	46, 47	Sectional overlap	n/d	n/d	n/d	n/d	n/d	n/d	n/d
	Svensk Dagligvaruhandel	46, 47	n/d	n/d	n/d	n/d	n/d		Yes	
	Svensk Handel	45, 46, 47, 47.9	Congruence	10,338	274,139	Multi-employer bargaining	Yes	Regular	Yes	
	TeknikGrönsakernas Arbetsgivarförbundet	45, 46	Sectionalism	12	2,300	Multi-employer bargaining			No	
SI	OZS	45, 47	Sectional overlap						No	UEAPME

Country	Name	Sector coverage	Sector organisation	Total companies in membership	Total employees in these companies	Involvement in collective bargaining	Consultation	Regularity	Membership of EuroCommerce	Membership of other EU social partner organisation
	PTZ	45, 46, 47, 47.9	Sectional overlap	900	n/d	Multi-employer bargaining	Yes	Ad hoc	No	European Small Business Alliance
	TZSLO	45, 46, 47, 47.9	Sectional overlap	4,030	58,000	Multi-employer bargaining	Yes	Regular	Yes	
	ZDS	45, 46, 47, 47.9	Sectional overlap	156	30,000	Multi-employer bargaining	Yes	Ad hoc	No	BusinessEurope
SK	COOP Jednota	46, 47	Sectionalism	39	14,186	Multi-employer bargaining	Yes	Regular	Yes	Euro Coop
	ZOCR SR	46, 47, 47.9	Sectional overlap	79	15,000	Multi-employer bargaining	Yes	Regular	Yes	
UK	BRC	45, 46, 47, 47.9	Congruence	90	n/a	No bargaining	Yes	Ad hoc	Yes	

**Table 48: Bipartite and tripartite sector specific boards of public policy with representation of commerce sector employers and trade unions**

	Name of the body and scope of activity	Bipartite/tripartite	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
BE	Joint committee(s): Responsible for sectoral negotiations and signing sectoral collective agreements	Bipartite	Statutory	n/d	n/d
BG	Sectoral Council for Tripartite Cooperation, Ministry of Economy	Tripartite	Statutory	ITUFECCTS, NFCSCT Podkrepa CL	UTB
CZ	RSHD ČR (tripartite) – team for internal market Domain of activity: all issues relating internal (domestic) market	Tripartite	Statutory	Representative of OSPO	Representative of SO ČR
DK	BAR Industri	Bipartite	Statutory	Dansk El-forbund, Dansk Metal, HK, NNF, Teknisk Landsforbund, 3F	Dansk Mode & Textil, DI
	BFA Handel (Branchefælles-skab for Handel, Finans, Kontor)  <i>Working environment association for Commerce, Finance, Office</i>	Bipartite	Statutory	HK Handel, NNF, Serviceforbundet	Bager- og Konditormestre i Danmark, Benzin- og Oliebranchens Arbejdsgiverforening, Brugsforeningernes Arbejdsgiverforening, Dansk Erhverv, Danske Slagtermestre, Fællesforeningen for Danmarks Brugsforeninger
	Det Faglige Fællesudvalg for bager- og konditorfaget  <i>Trade committee for vocational training for the baker and confectioner profession</i>	Bipartite	Statutory	NNF	Dansk Erhverv
	Det faglige udvalg for detailhandels-	Bipartite	Statutory	HK Handel	Dansk Erhverv, DI

	uddannelsen  <i>Trade committee for vocational training in retail</i>				
	Det faglige udvalg for handels- uddannelsen  <i>Trade committee for vocational training in commerce</i>	Bipartite	Statutory	HK Handel, HK Privat	Dansk Erhverv, DI
	Industriens Uddannelser  <i>Trade committee for vocational training in industry</i>	Bipartite	Statutory	Dansk Metal, 3F	DI
	Malerfagets faglige fællesudvalg	Bipartite	Statutory	Malerforbundet	Danske Malermestre, Autobranchens, Arbejdsgiverforening
EE	Estonian Qualifications Authority (Kutsekoda) <i>Professional council</i>	Tripartite	Statutory	ETKA	EKL
ES	State Foundation for Training in Employment – Commerce’s Joint Committee	Tripartite	Law 30/2015 on the Regulation of the Training in Employment System	CIG, FeSMC-UGT, CCOO Servicios	AEFI, CEC, CEGAL, FEDIFAR, FEMPDA, FENPYD
FI	Liiketoiminnan ja hallinnon osaamisen ennakointiryhmä  <i>Competence prognostics group for business and administration</i>	Tripartite	Statutory	PAM / SAK, Trade Union for the Public Sector and Welfare Sectors (JHL) / SAK, Federation of Public and Private Sector Employees (Jyty) / STTK, Finnish Business School Graduates (Ekonomit) / Akava, Union of Professional Business Graduates in Finland (TRAL) / Akava, Trade Union of Education (OAJ)	Federation of Finnish Financial Services (Finance Finland, FFI) / EK, Finnish Commerce Federation / EK, Association of Finnish Independent Education Employers (AFIEE), Booksellers’ Association of Finland / Federation of Finnish Enterprises (SY)

	<p>Työturvallisuuskeskuksen palveluryhmä</p> <p><i>Occupational safety sector group of the Centre for Occupational Safety for the service sector</i></p> <p>The group promotes occupational safety within the sector and cooperation thereupon and develops working life at workplaces.</p>	Tripartite	Agreement	<p>PAM / SAK, Trade Union for the Public Sector and Welfare Sectors (JHL) / SAK, Pro / STTK, Finnish Union of Practical Nurses (SuPer) / STTK, Union of Health and Social Care Professionals in Finland (Tehy) / STTK, SFL / Akava, Confederation of Unions for Professional and Managerial Staff in Finland (Akava)</p>	<p>Confederation of Finnish Industries (EK), Finnish Commerce Federation (Kauppa), Federation of Finnish Financial Services (Finance Finland, FFI) / Service Sector Employers PALTA, Welfare Federation (HALI, Hyvinvointialan liitto), Real Estate Employers (Kiinteistöyönantajat), APTA, Finnish Hospitality Association (MaRa), Association of Finnish Independent Education Employers (AFIEE), Private Employment Agencies Association (HPL)</p>
FR	<p>APCDNA (Association Paritaire des Commerces de Détail Non-Alimentaires)</p> <p><i>Social dialogue</i></p>	Bipartite	Agreement	<p>FNECS CFE-CGC, CFTC-CSFV, CFDT - Services, FEC-FO</p>	CDNA
	<p>Commission Paritaire Nationale pour l'Emploi et la Formation Professionnelle (National bipartite commission on employment and professional training)</p> <p><i>Professional training issues</i></p>	Bipartite	Statutory and agreement	<p>All representative unions in each of the 40 branches</p>	<p>All representative employer organisations in each of the 40 branches</p>
	<p>Commission Paritaire de Branche – CPB (Bipartite sector commission) –</p> <p><i>The CPB is in charge of the collective bargaining within the tanning and leather sector</i></p>	Bipartite	Statutory and agreement		
	Forco <sup>38</sup>	Bipartite	Agreement	All	All representative

<sup>38</sup> Forco covers the following branches: Importation exportation commission courtage (43); Commerce succursaliste de la chaussure (468); Commerce succursaliste de l'habillement (675); Horlogerie (1044) ;

				representative unions within the scope of the national collective agreement covered by Forco	employer organisations within the scope of the national collective agreement covered by Forco
	Intergros <sup>39</sup>	Bipartite	Agreement	All representative unions within the scope of the national collective agreement covered by Intergros	All representative employer organisations within the scope of the national collective agreement covered by Intergros
	IRPAUTO <i>Complementary social protection</i>	Bipartite	Agreement	All representative unions within the scope of the national collective agreement covered by IRPAUTO	All representative employer organisations within the scope of the national collective agreement covered by IRPAUTO
HU	Sectoral Dialogue Committee	Bipartite	Statutory	KASZ	ÁFEOSZ, KISOSZ, MNKSZ, OKSZ
IE	Oireachtas Committee	Tripartite	n/a	Mandate, SIPTU	IBEC Retail Ireland, ISME, RGDATA
IT	Cassa QUAS <i>Health fund</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confcommercio
	Coopform <i>Vocational training fund</i>	Bipartite	Agreement/statutory	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	A.G.C.I., ANCC Coop, A.N.C.D., C.C.I.
	Ebincoop <i>Monitoring and research tasks</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	A.G.C.I., ANCC Coop, A.N.C.D., C.C.I.
	EBN.TER – Ente	Bipartite	Agreement	FILCAMS-	Confesercenti

Optique-lunetterie de détail (1431); Commerce de détail de l'horlogerie-bijouterie (1487); Commerces de détail non alimentaires (1517); Bricolage (1606); Grands magasins et magasins populaires (2156) ; Commerce à distance (2198); Commerce à prédominance alimentaire (détail et gros) (2216); Professions de la photographie (3168).

<sup>39</sup> Intergros covers the following branches: Commerces de gros (573); Quincaillerie commerces cadres (731); Quincaillerie commerces employés (1383); Commerce de gros des tissus, tapis et linge de maison (1761).



Bilaterale Nazionale per il Terziario (National Bilateral Institute for the Tertiary Sector) <i>Monitoring, research and training tasks</i>			CGIL, FISASCAT-CISL, UILTUCS-UIL	
Ente Bilaterale Nazionale del Terziario (National Bilateral Tertiary Sector Institute) <i>Monitoring, research and training tasks</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confcommercio
Fondartigianato <i>Vocational training fund</i>	Bipartite	Agreement	CGIL, CISL, UIL	Casartigiani, CLAAI CNA, Confartigianato,
Fondo di settore Aster <i>Health fund</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confesercenti
Fondo di solidarietà bilaterale per l'artigianato <i>Income support fund</i>	Bipartite	Agreement/statutory	CGIL, CISL, UIL	Casartigiani, CLAAI, CNA, Confartigianato
Fondo EST <i>Health Fund</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confcommercio
Fondo paritetico interprofessionale Foncoop <i>Vocational training fund</i>	Bipartite	Agreement/statutory	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	A.G.C.I., ANCC Coop, A.N.C.D., C.C.I.
Fondo Paritetico Interprofessionale Nazionale <i>Vocational training fund</i>	Bipartite	Agreement/statutory	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confesercenti
Fondo paritetico interprofessionale ForTE <i>Vocational training fund</i>	Bipartite	Agreement/statutory	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confcommercio
Fondo pensione negoziale FONTE <i>Pension fund</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confcommercio

	Fondo pensione negoziale Previcoooper <i>Pension fund</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	A.G.C.I., ANCC Coop, A.N.C.D., C.C.I.
	Fondo sanitario Coopersalute <i>Health fund</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	A.G.C.I., ANCC Coop, A.N.C.D., C.C.I.
	Osservatorio nazionale (National Observatory) <i>Monitoring tasks</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confcommercio
	Osservatorio Nazionale <i>Monitoring and research tasks</i>	Bipartite	Agreement	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confesercenti
	Quadrifor Vocational training fund	Bipartite	Agreement/statutory	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Confcommercio
NL	BPF AVH <i>Pension fund for wholesale agrarian foodstuffs</i>	Bipartite	Agreement	CNV Vakmensen, FNV	GroentenFruit Huis, NAO, ANVE, Gemzu
	BPF Foodservice <i>Pension fund for food wholesale</i>	Bipartite	Agreement	Unknown, but likely CNV Vakmensen and FNV	Unknown, but likely VOG
	BPF Houthandel <i>Pension fund for dealers in wood</i>	Bipartite	Agreement	Unknown, but likely CNV Vakmensen and FNV	Unknown
	BPFL <i>Pension fund for supermarkets</i>	Bipartite	Agreement	CNV Vakmensen, FNV	Vakcentrum, VGL
	HiBiN <i>Pension fund for dealers in construction materials</i>	Bipartite	Agreement	CNV Vakmensen, FNV	HiBiN (Vereniging van handelaren in bouwmaterialen in Nederland)
	Pensioenfonds Detailhandel <i>Pension fund for retail</i>	Bipartite	Agreement	CNV, FNV	MKB-Nederland, RND
	Pensioenfonds Dranken <i>Pension fund for beverages</i>	Bipartite	Agreement	CNV Vakmensen, FNV, VCP	FWS, GDH, KNVW, Spirits NL
	PGB <i>Pension fund for wholesale flowers and</i>	Bipartite	Agreement	CNV Vakmensen, FNV	VGB

	<i>plants</i>				
	SPNG <i>Pension fund for wholesale and recycling of paper and textiles</i>	Bipartite	Agreement	CNV Vakmenssen, FNV, VCP	NVG, FNOI, VHT
RO	Social and Economic Council	Tripartite	Statutory	Indirect representation through CNS Cartel Alfa representatives (as FSC is affiliated to them)	Indirect representation through CONCORDIA Confederation (as FPRC and ANRCR are affiliated to them)
	Social Dialogue Commission of the Ministry of Labor and Social Justice	Tripartite	Statutory	Indirect representation through CNS Cartel Alfa representatives (as FSC is affiliated to them)	Indirect representation through CONCORDIA Confederation (as FPRC and ANRCR are affiliated to them)
SE	Swedish Retail and Wholesale Council	Bipartite	Agreement	AHT, Handels, Unionen	KFO, Svensk Handel
SK	Social and Economic Council	Tripartite	Statutory	Indirect representation through CNS Cartel Alfa representatives (as FSC is affiliated to them)	Indirect representation through CONCORDIA Confederation (as FPRC and ANRCR are affiliated to them)

Source: Network of Eurofound Correspondents' national contributions to this study (2017–2018)

**Table 49: UNI Europa membership 2018**

Country	Trade unions affiliated to UNI Europa
AT	GPA-djp, vida
BE	ACLVB/CGSLB, ACV-CSC Alimentation et Services, BBTK/SETCa, CNE, LBC/NVK
BG	None
CY	OBIEK-SEK, OIYK-SEK
CZ	OSPO
DE	ver.di
DK	HK, NNF, 3F

Country	Trade unions affiliated to UNI Europa
EE	ESTAL, ETKA
EL	OIYE
ES	CCOO-Servicios, ELA-Zerbitzuak, FeSMC-UGT
FI	ILRY, PAM
FR	CFDT, CFDT-Cadres, CGT-Commerce, FEC-FO, FGTA-FO
HR	STH
HU	KASZ
IE	Mandate
IT	FILCAMS-CGIL, FISASCAT-CISL, UILTuCS-UIL
LT	LKKDPS, LPSDPS
LU	LCGB commerce, food processing and catering; OGBL
LV	LTDA
MT	GWU
NL	CNV Vakmensen, FNV
PL	NSZZ Solidarność
PT	SITESE
RO	FSC
SE	AHT, Handels, Unionen
SI	None
SK	OZPOCR
UK	GMB, Unite, USDAW

**Table 50: EuroCommerce membership 2018 (national and affiliate members)**

	Employer organisations affiliated to EuroCommerce as 'national associations'	Employer organisations affiliated to EuroCommerce as 'affiliate members'
AT	WKÖ BGA, WKÖ BGHADP, WKÖ BIF, WKÖ BSH	
BE	Comeos	
BG	AMT	
CY	KEBE	
CZ	SOČR ČR	
DE	BGA, HDE	
DK	Dansk Erhverv	
EE	EKL	
EL	ESEE, SELPE	
ES	ACES, ANGED, ASEDAS	
FI	Kauppa	<i>ETU</i>
FR	CDCF, CDNA, CGI, FCD, Fédération de l'Horlogerie, FEH, FFQ, FICIME, FMB, FNH, FNMJ, FNP, SNOR, UDO, UFIP, Union Sport et Cycle, UPECAD	
HR	HGK, HUP-Udruga trgovine	
HU	OKSZ	
IE	Retail Ireland	
IT	Confcommercio, Federdistribuzione	
LT		
LU	ADAL, CLC	
LV	LPTA, LTA	
MT	GRTU	
NL	Inretail, MKB-Nederland, Vakcentrum, VGT, VWDHZ, WTG	<i>CBL</i>
PL	POHiD	
PT	ACPorto, ADIPA, APED	
RO	AMRCR, FRPC	
SE	Svensk Handel	<i>Svensk Dagligvaruhandel</i>
SI	TZSLO	
SK	Jednota, SAMO, ZOČR SR	
UK	BRC	
Cross national affiliate members		<i>Direct Selling Europe, Ecommerce Europe, EDRA (European DIY Retail Association), EMOTA (E-commerce), ETRC (European Travel Retail Council), EUEW (European Union of Electric Wholesalers), FECC (European Association of Chemical Distributors; Seldia (direct selling)</i>

Note: Affiliate members are marked in italics

**Table 51: EuroCommerce membership 2018 (companies)**

Country	Name	Collective bargaining
BE	Ahold Delhaize	Yes
US	Amazon	In some EU countries
FR	Auchan	Yes
FR	Carrefour	Yes
DE	Ceconomy	Yes
SE	Clas Ohlson	Yes
BE	Coluryt Group	Yes
CH	Coop	n/d
FR	Decathlon	Yes
DE	Edeka	Yes
BE	Edenred	Yes
ES	El Corte Inglés	Yes
US	Herbalife Nutrition	n/d
SE	Ikea	Yes
ES	Inditex	Yes
PT	Jeronimo Martins	Yes
NL	Kappé International	Yes
DE	Kaufland	Yes
FI	Kesko <sup>40</sup>	Yes
UK	Kingfisher	Yes
DE	Lidl	Yes
DE	Markant	Yes
UK	Marks & Spencer	n/d
ES	Mercadona	Yes
DE	Metro	Yes
DE	REWE	Yes
PT	Sonae	Yes
AT	Spar	Yes
UK	Tesco	Yes
DE	Vorwerk	Yes
US	Walgreens Boots Alliance	n/d

<sup>40</sup> Kesko has a joint venture in Lithuania (Kesko Senukai Lithuania). No collective bargaining takes place in this company.

## Annex 2: Network of Eurofound Correspondents

### Correspondents who contributed to the study

Country	Name	Organisation
AT	Bernadette Allinger	FORBA
BE	Guy Van Gyes	HIVA – KU Leuven
BG	Gabriela Yordanova	Bulgarian Academy of Sciences
CY	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
CZ	Petr Pojer	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	Cologne Institute for Economic Research
DK	Carsten Jorgensen	FAOS, University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Elena Kousta Penny Georgiadou	Labour Institute of GSEE
ES	Pablo Sanz	Notus
FI	Anna Savolainen	Oxford Research
FR	Frederic Turlan	IR Share
HR	Predrag Bejaković	Institute of Public Finance
HU	Annamaria Kunert	Policy Agenda
IE	Andy Prendergast	IRN Publishing
IT	Anna Arca Sedda	Fondazione Giacomo Brodolini
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Frederic Turlan	IR Share
LV	Kriss Karnitis	EPC Ltd
MT	Luke Fiorini	Centre for Labour Studies, University of Malta
NL	Noelle Payton	University of Amsterdam
PL	Dominik Owczarek	Institute of Public Affairs
PT	Reinhard Naumann	
RO	Nicoleta Stoiciu	European Institute of Romania
SE	Anna Savolainen Anna-Karin Gustafsson	Oxford Research AB
SI	Barbara Luzar	Faculty of Social Sciences, University of Ljubljana
SK	Rastislav Bednarik	Institute for Labour and Family Research
UK	Mark Carley	







This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the commerce sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements. The aim of Eurofound's representativeness studies is to identify the relevant national and European social partner organisations in the field of industrial relations in selected sectors in the EU Member States. This study identified EuroCommerce (representing employers) and UNI Europa (representing employees) as the most representative European-level social partner organisations in the commerce sector.

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