

Industrial relations

Representativeness of the European social partner organisations: Paper sector



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This report presents the results of research conducted prior to the outbreak of COVID-19 in Europe in February 2020. For this reason, the results do not take account of the outbreak.

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Country codes

AT	Austria	FI	Finland	NL	Netherlands
BE	Belgium	FR	France	PL	Poland
BG	Bulgaria	HR	Croatia	PT	Portugal
CY	Cyprus	HU	Hungary	RO	Romania
CZ	Czechia	IE	Ireland	SE	Sweden
DE	Germany	IT	Italy	SI	Slovenia
DK	Denmark	LT	Lithuania	SK	Slovakia
EE	Estonia	LU	Luxembourg		
EL	Greece	LV	Latvia		
ES	Spain	MT	Malta	UK	United Kingdom

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 paper 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 of and the employment trends in the paper sector; an analysis of the social partner organisations in the 27 EU Member States and the United Kingdom (UK)¹; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the paper sector, which was established in its current form in 2010.

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 one eligibility criterion for setting up or participating in an ESSDC.
- Representativeness means also 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 the European Commission Decision on the establishment of Sectoral Social Dialogue Committees promoting the Dialogue between the social partners at European level (98/500/EC) (European Commission, 1998). For an organisation to be recognised as a representative EU social partner organisation, it must:

- relate to specific sectors or categories and be organised at European level
- consist of organisations that are themselves an integral and recognised part of Member States’ social partner structures, that have the capacity to negotiate agreements and which are representative of several Member States
- have adequate structures to ensure its effective participation in the work of the ESSDCs

To accomplish its aims, this study first identifies the relevant national social partner organisations in the paper sector before analysing the structure of the sector’s relevant European organisations, in particular their membership composition. This analysis involves clarifying the unit of analysis at both the national and European levels. The study includes only those organisations whose membership domain is classed as ‘sector related’. In terms of territorial coverage, the study includes the EU27 and the UK.

¹ This research was carried out prior to the UK’s withdrawal from the European Union on 31 January 2020 and includes data relating to the 27 current EU Member States and the UK.

ESSDC for the sector

Social dialogue for the paper sector started in 2007 on an informal basis, first with meetings between the European Mining Chemicals, Energy Federation (EMCEF) and the Confederation of European Paper Industries (CEPI) at the EMCEF Secretariat in 2007, 2008 and 2009. Those informal meetings were linked to CEPI's board meetings and involved commitments from paper sector trade unions affiliated to EMCEF to support CEPI in industrial policy positions. The member in the EMCEF Secretariat responsible for these activities (Peter Kerckhofs) and the representative from CEPI's German member organisation (Hans-Joachim Blömeke) presented their joint activities at a Cedefop conference in 2009. Important support for the establishment of the social dialogue process also came from Christer Larsson of the Swedish trade union Pappers and from Bernard de Galembert and Teresa Presas, both from CEPI. The agreement to start an ESSDC for the paper sector developed out of this process in the second half of 2009. It was endorsed by both organisations at the beginning of 2010, allowing the committee to commence formally in May 2010.

Since then, the paper sector ESSDC has jointly agreed seven texts. Most of these relate to competitiveness and industrial policy matters like bio-energy policy (2014), boosting reindustrialisation (2014), climate change (2015), the impact of digitalisation (2018) and the opportunities of a circular bio-economy (2019). The following social topics were addressed as part of specific EU-funded projects and resulted in jointly agreed outcomes:

- a guide to good health and safety practices in the European paper Industry (CEPI and EMCEF, 2012)
- joint recommendations on future skills and competency needs in the pulp and paper sector (CEPI and IndustriAll Europe, 2016)

UNI Europa reported that an informal arrangement was made between them and IndustriAll Europe for a delegate from UNI Europa to attend the meetings of the paper sector ESSDC. Apparently, this mandate was initially taken up by an Italian trade union delegate on behalf of UNI Europa. This is no longer the case; as Table 35 indicates, no Italian trade union delegate attended the ESSDC meetings in 2017 and 2018.

In 2019, to follow up on previous work on training and education in the field, CEPI and IndustriAll Europe proposed a joint project focusing on the attractiveness of the sector. This EU-funded project will be implemented in 2020.

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 (European Commission, 1998). Each of these criteria will be defined successively in this section, starting with sector-relatedness – that is, the demarcation of the paper sector in agreement with the social partners and the European Commission.

Sector-relatedness

In this study, the paper sector is described as covering the following NACE² codes: 17.1 and 17.2 (Table 1).

² NACE refers to the European 'statistical classification of economic activities in the European Community' – specifically, NACE Rev. 2. For the demarcation of a specific sector, reference is made to a number of NACE codes.

Table 1: Demarcation of the paper sector based on NACE codes

NACE code	Corresponding economic activity
17.1	Manufacture of pulp, paper and paperboard
17.2	Manufacture of articles of paper and paperboard

Source: NACE (Rev.2)

NACE code 17.1 includes the manufacture of pulp, paper and paperboard, and NACE code 17.2 covers the manufacture of articles of paper and paperboard, which can include corrugated paper, household and sanitary goods, stationary, wallpaper, etc. Related activities belonging to NACE code 18, such as printing, are not included in the scope of this study.

At the start of this study, CEPI reported that it represents its members in relation to their activities under NACE 17.1 only, while IndustriAll Europe represents its members under both NACE 17.1 and 17.2. While the scope of the study was clearly determined as covering NACE 17, some ambiguity has emerged. In the opinion of UNI Europa, paper converting activities (which are covered by NACE codes 18.11 to 18.15) are understood as being part of NACE 17.2. As their view only became apparent at the end of this research project, specific questions regarding the precise delimitation between the paper sector and graphical industries were not included in the data collection phase.

Table 2 shows the membership domain patterns that can exist. The membership domains of trade unions and employer organisations can be exactly in line with this demarcation of the sector (i.e. covering all activities in NACE codes 17.1 and 17.2); this type of sector-relatedness is called 'congruence'. If the membership domain of an organisation goes beyond the paper sector as described here, it is categorised as 'overlapping'. 'Sectional' is a type of sector-relatedness whereby an organisation covers a part of the sector and nothing else, whereas organisations that fall into the category of 'sectional overlapping' cover part of the sector but also have members in other sectors.

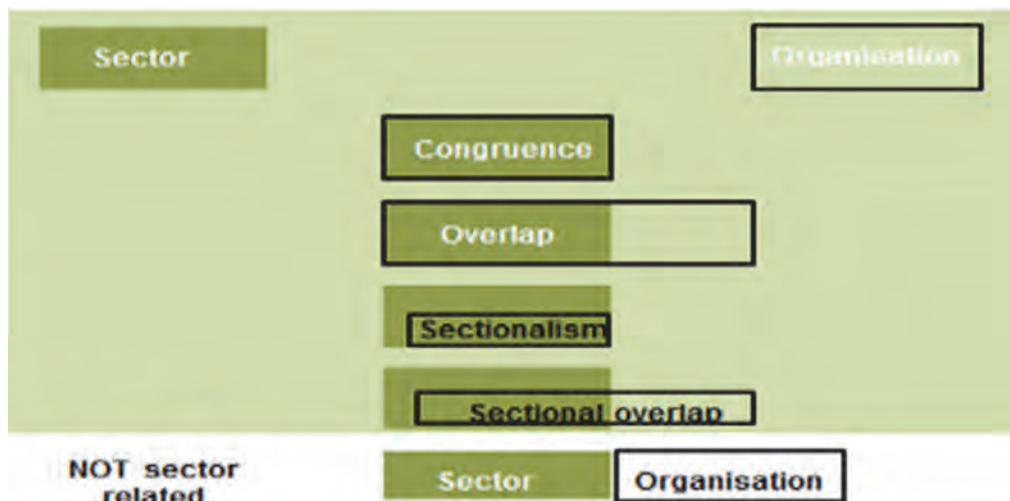
Table 2: Domain patterns of the members of an organisation

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

Source: Eurofound

Figure 1 presents the four types of sector-relatedness graphically.

Figure 1: Four types of sector-relatedness



Source: Eurofound

Membership

Membership constitutes another important aspect of representativeness. Two levels of membership are looked at here: first, the geographical coverage of the EU-level organisations (the Member States where the EU-level trade union/employer organisation has affiliates) and, second, the organisational density of the national affiliates. An important aspect to be assessed is whether the EU-level players organise most of the national-level players, or at least the most significant ones, in relation to their membership strength in the sector and their involvement in collective bargaining, and whether there are any major gaps in their membership domain.

Membership in a social partner organisation requires payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Taking into account limits of transparency, this study does not always distinguish between different membership statuses. Where possible, indirect membership is taken into account in this report.

Organisational capacity

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

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

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

Finally, representativeness also depends upon the organisations' structures and resources and their capacity to mobilise the active participation of their members and aggregate the different interests of member organisations, as well as their potential to act autonomously at European level. **Effective participation in the ESSDC** meetings is assessed in terms of presence at the meetings in the two years before the year of publication of this report.

Data collection and quality control

Representativeness studies combine top-down and bottom-up approaches. The top-down approach aimed to identify all sector-related affiliates of the European associations IndustriAll Europe and CEPI, while the bottom-up approach targeted other organisations involved in collective bargaining related to the paper sector and sought to identify their membership in other 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 unanswered.

Thus, most quantitative data stem from three sources, namely:

- official statistics and representative surveys
- administrative data, such as membership figures provided by the respective organisations (for example, to calculate the density rates)
- estimates, expert opinions and assessments made by the Network of Eurofound Correspondents or representatives of the respective organisations

Other sources include data and reports published by IndustriAll Europe, CEPI and their respective members, the social dialogue texts database and data from Eurostat (Structural Business Statistics and the EU Labour Force Survey).

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study. A preparation meeting was held on 13 September 2018 with IndustriAll Europe and CEPI at the premises of the European Commission.

First, combining the top-down with the 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 in spring 2019. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise these in September 2019.

An overview of the national contributions was made available to the European social partners in January 2020 to allow their affiliates to double-check the content and provide comments. In addition, the national members of the Eurofound Management 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 from their countries. As different social partner organisations were able to view the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information from other organisations representing a similar membership, this process involved an element of mutual control and recognition.

Draft versions of the overview report were shared in January 2020 with CEPI, IndustriAll Europe, the European Commission and, following a request for clarification, with UNI Europa. The final report, taking into account all comments provided, would normally have been evaluated and approved in the 25 March 2020 meeting of the Eurofound Advisory Committee on Industrial Relations – which consists of representatives of both sides of industry, governments and the European Commission – in the presence of the European-level sectoral social partners identified in the report. However, due to the COVID-19 outbreak, this evaluation meeting was cancelled; as a result, this report was evaluated in writing. After this formal evaluation, the report was edited and prepared for publication in the second half of 2020.

Structure of the report

The report consists of three main parts, beginning with a brief summary of the economic background and employment specificities of the paper sector. The report then analyses the relevant social partner organisations in the 27 EU Member States and the UK. The third part considers the representative associations at European level.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not conclude whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in the European social dialogue. The information and analyses provided in this report shall provide the evidence base for further efforts and decisions of the social partners themselves and the European Commission.

1. Economic background and employment trends in the sector

This chapter describes the economic background of the paper sector in terms of employment and company structure.

Employment in the paper sector

The paper sector in the EU employs around 650,000 people, which amounts to 0.46% of the total EU workforce. Table 3 shows the total number of employees in the paper sector as well as sectoral employment as a share of total employment in each of the EU Member States and as a share of the total EU paper sector workforce. The countries with the highest numbers of paper sector workers are Germany (144,021 workers), Italy (71,222), France (64,655), Poland (58,081) and the UK (57,077). Together, these countries employ just over 60% of the paper sector workforce in the EU as a whole.

Relative to the national workforce, the paper sector is largest in Finland (1.5% of all employees in the country) and Sweden (1.1%). The lowest shares are found in Ireland and Latvia, where the paper sector makes up 0.2% of total employment.

Table 3: Persons employed in the paper sector, 2016

	Number of employees in the paper sector	Share of national employment (%)	Share of EU paper sector workforce (%)
DE	144,021	0.5	22.2
IT	71,222	0.5	11.0
FR	64,655	0.4	9.9
PL	58,081	0.6	8.9
UK	57,077	0.3	8.8
ES	43,139	0.4	6.6
SE	33,979	1.1	5.2
FI	21,979	1.5	3.4
CZ	20,614	0.6	3.2
NL	17,118	0.3	2.6
AT	16,675	0.6	2.6
HU	14,913	0.6	2.3
RO	14,380	0.4	2.2
BE	10,955	0.4	1.7
PT	10,435	0.3	1.6
BG	10,309	0.5	1.6
EL	7,307	0.3	1.1
SK	6,956	0.5	1.1
DK	4,717	0.3	0.7
LT	4,609	0.5	0.7
HR	4,481	0.5	0.7
SI	4,271	0.7	0.7

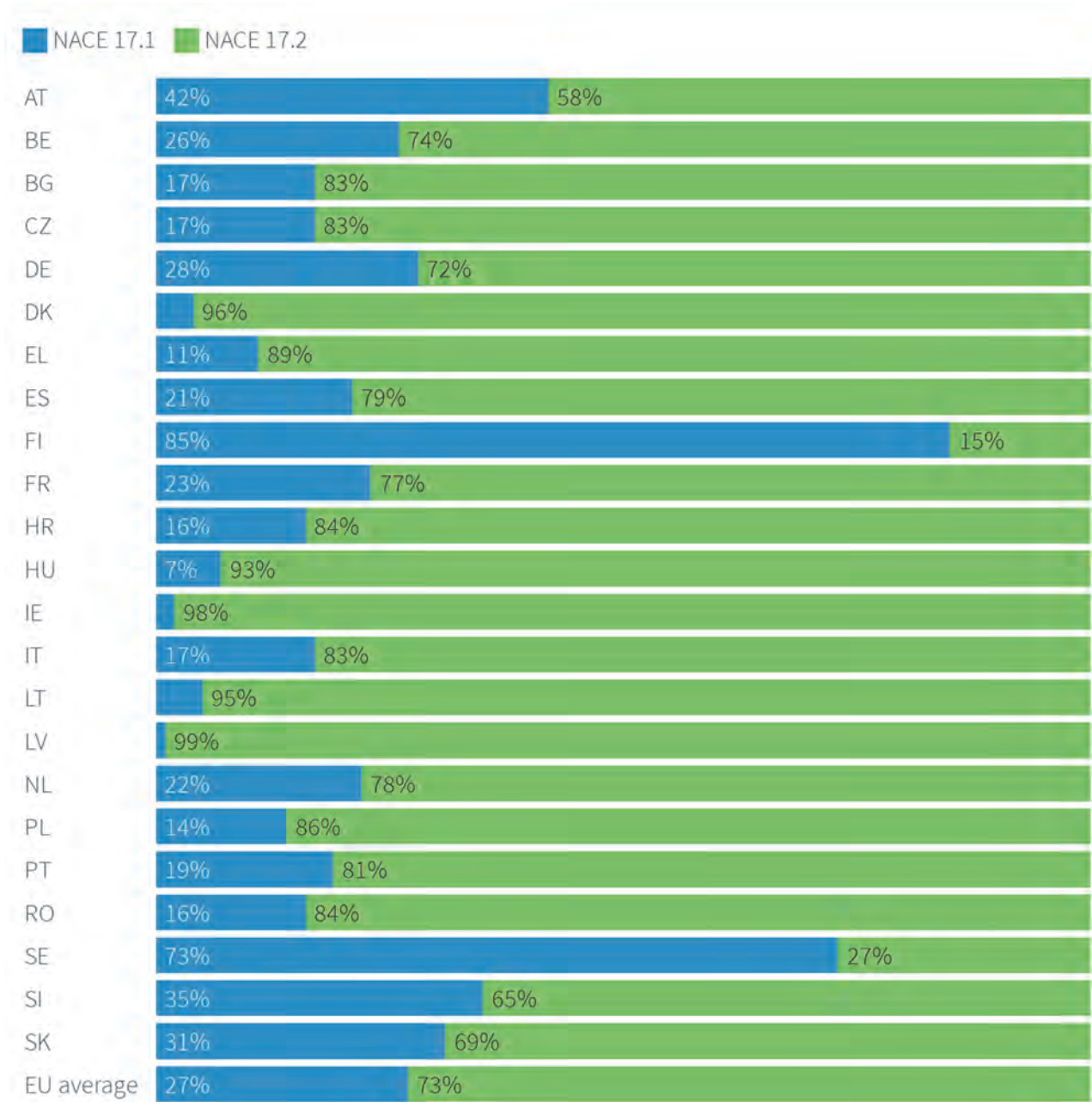
IE	3,134	0.2	0.5
LV	1,429	0.2	0.2
EE	1,367	0.3	0.2
CY	596	0.3	0.1
LU	n.d.	n.d.	n.d.
MT	n.d.	n.d.	n.d.

Notes: *n.d.* = no data. Countries are ordered according to number of employees in the paper sector.

Source: Eurostat, *Structural Business Statistics, 2016*

The two subsectors – manufacture of pulp, paper and paperboard (NACE code 17.1) on the one hand, and manufacture of articles of paper and paperboard (NACE code 17.2) on the other – are quite different in size, with the latter employing almost three in four paper sector workers in the EU (Figure 2). There are variations at country level (see Table 38 in Annex 1 for the distribution of paper sector employment according to NACE codes 17.1 and 17.2 in the 23 EU Member States for which these data are available). For example, in Finland, 85% of sectoral employment is in NACE 17.1, while in Sweden this is 73% and in Austria, 42%.

Figure 2: Employment in NACE codes 17.1 and 17.2 (%), 2019

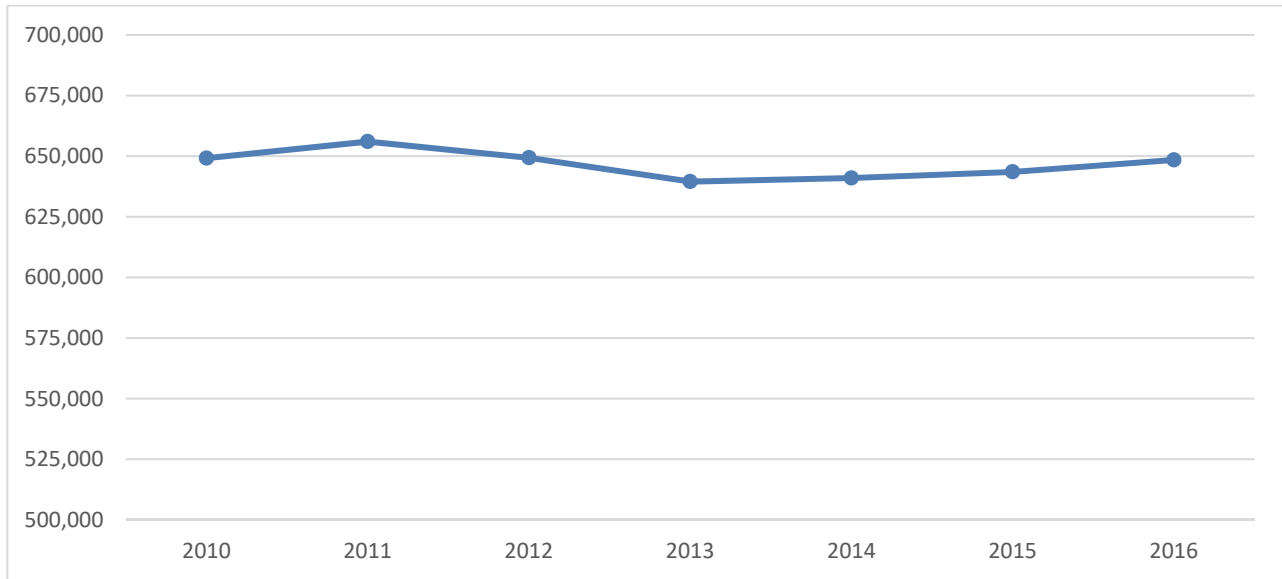


Note: Data are missing for Cyprus, Estonia, Luxembourg, Malta and the UK.

Source: Eurostat, Structural Business Statistics, 2019

In 2016, the number of employees in the paper sector in the EU was 648,419 – very similar to the number in 2010. However, some fluctuation occurred between 2010 and 2016, with an employment peak in 2011 and a low in 2013, as illustrated in Figure 3.

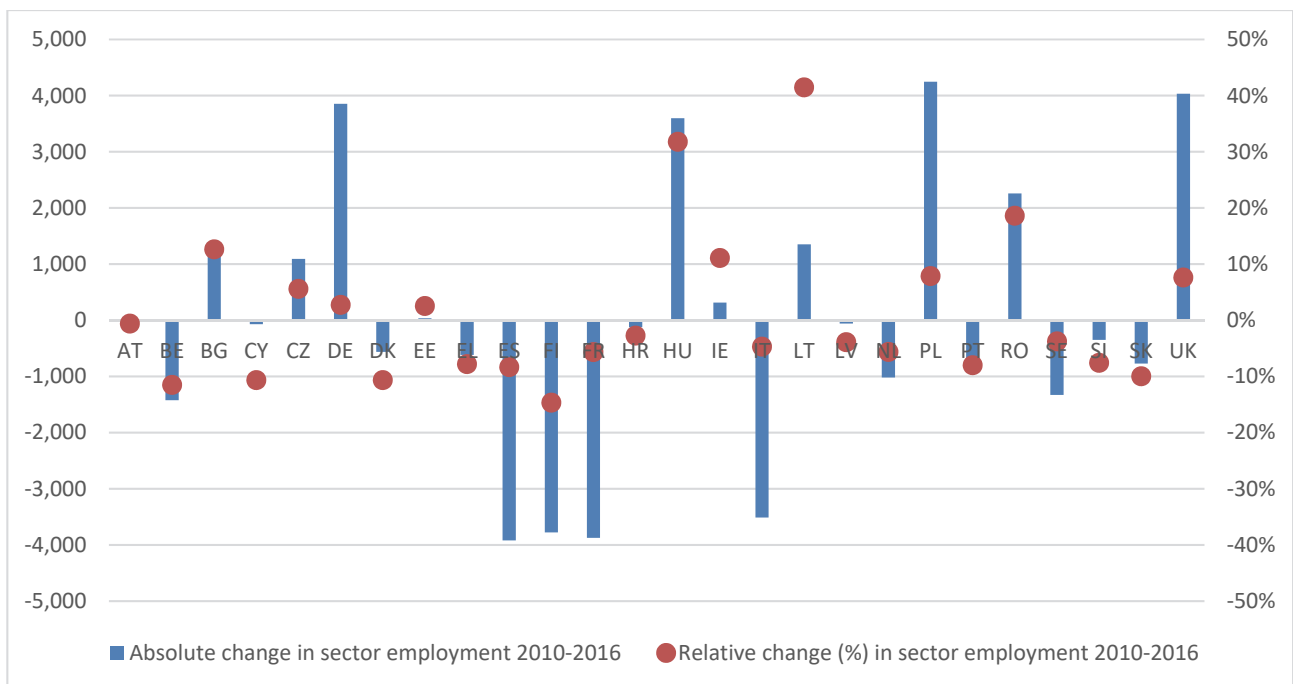
Figure 3: Number of employees in the paper sector in the EU, 2010–2016



Source: Eurostat, Structural Business Statistics, 2016

While employment in the sector remained relatively stable at EU level between 2010 and 2016, different trends were observed for the Member States. In absolute numbers, employment growth was highest in Poland, followed by the UK, Germany and Hungary (Figure 4). The most sizeable decreases occurred in Spain, France, Finland and Italy. The overall stable employment in the EU (Figure 3) must be understood in terms of the balancing out of jobs lost in some countries with jobs gained in others (see the blue bars in Figure 4). However, looking at changes in the percentage of sector employment in each country gives a different picture (see the red dots in Figure 4). Between 2010 and 2016, the biggest employment growth relative to sector size was in Lithuania, with an increase of 41.5%, followed by Hungary with an increase of 31.8%. The most significant decrease occurred in Finland, where sector employment decreased by 14.7%.

Figure 4: Change in paper sector employment (number and %), 2010–2016



Note: Data are missing for Luxembourg and Malta.

Source: Eurostat, Structural Business Statistics, 2016

The paper sector is an established and mature manufacturing industry with a tradition of trade unionism. In several countries, trade unions report that they find it easier to organise employees in the paper sector than in other sectors. In countries where union density is traditionally high – such as Finland and Sweden – the paper sector still stands out for its exceptionally high rates of unionisation.

While union membership rates are high overall, they tend to be higher for NACE code 17.1, possibly due to the larger plant sizes involved. Also, countries where paper companies are smaller tend to see lower union density rates. This is the case, for example, in the Baltic states as well as in Romania, where many companies are so small that they fail to meet the statutory representativeness requirements. Organising workers is also facilitated by the fact that the most common form of employment is through standard – that is, full-time and permanent – contracts.

Many countries report that there is no established distinction between NACE sectors 17.1 and 17.2. This in turn could facilitate the organisation of both employees and employers, as it makes for less fragmented landscapes of actors and broader membership bases.

Risks to the health and safety of workers in the sector include exposure to certain substances and high temperatures, the running of machines, the transport and handling of loads and the maintenance of production equipment (CEPI and EMCEF, 2012). Demands on newly employed staff in terms of levels of specialisation and education requirements have been gradually increasing.

Companies in the paper sector and their economic development

In 2016, a total of 19,816 companies were active in the paper sector in the EU. As shown in Table 4, most of these companies are located in Italy, Poland, Germany, Spain, France and the UK. Together, these six countries account for 65% of all paper sector companies in the EU.

Table 4 also gives an overview of the distribution of companies in terms of size. Small companies are common in the paper sector: 65% of companies in the sector had 0 to 9 employees in 2016. However, there is a noticeable difference within this first size category between countries such as Greece, Poland and Slovakia, where almost all companies are very small, and countries such as Austria, where only 29% of companies are in this size category. The countries with the highest absolute numbers of companies with 0 to 9 persons employed are Italy and Poland (both more than 2,200).

Among the larger companies, 12% of EU paper sector companies employ 10 to 19 persons, 11% employ 20 to 49 persons, 10% employ 50 to 249 persons, and 2% employ more than 250 persons. Germany has the highest number of companies (137) employing more than 250 workers. The country with the highest share of the largest companies is Luxembourg (33%), although it should be noted that this country had just three companies in the sector in 2016.

The average number of workers per company varies greatly between the countries. It ranges from 124 workers in Austria and 122 in Finland to 11 workers in Greece.

Table 4: Paper sector companies, by size, 2016

	Total number of companies	Share of companies employing 0–9 persons (%)	Share of companies employing 10–19 persons (%)	Share of companies employing 20–49 persons (%)	Share of companies employing 50–249 persons (%)	Share of companies employing 250 persons or more (%)	Average number of persons employed per company
EU	19,816	65	12	11	10	2	33
AT	135	29	10	16	29	16	124
BE	224	52	15	16	11	6	49
BG	512	65	13	13	7	1	20
CY	38	58	16	18	8	0	16
CZ	975	75	7	8	8	1	21
DE	1,705	43	11	14	24	8	85
DK	132	58	14	14	10	4	36
EE	61	64	11	10	13	2	22
EL	639	82	8	5	n.d.	n.d.	11
ES	1,652	61	15	13	9	2	26
FI	180	56	11	11	14	9	122
FR	1,637	59	12	14	12	3	40
HR	295	75	11	7	7	0	15
HU	527	72	8	10	7	2	28
IE	206	72	12	n.d.	7	n.d.	15
IT	3,763	65	18	10	6	1	19
LT	145	63	13	11	10	3	32
LU	3	33	0	33	0	33	n.d.
LV	109	73	10	10	6	0	13
MT	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
NL	368	53	10	12	21	3	47
PL	2,830	80	5	6	7	1	21
PT	571	72	11	9	7	1	18
RO	764	69	12	12	7	1	19
SE	391	63	9	11	10	7	87
SI	173	78	7	5	6	3	25
SK	340	82	5	5	6	2	21
UK	1,441	57	14	14	13	3	40

Note: n.d. = no data.

Source: Eurostat, Structural Business Statistics, 2016

As shown in Figure 5, while 77% of all paper companies in the EU have fewer than 20 employees and just 2% have 250 employees or more, the latter account for 43% of the employment in the sector.

Figure 5: Share of companies and share of employment, by size of company (%), 2016



Looking at the largest companies in each of the Member States, it is clear that a small number of multinational companies account for a large share of paper, pulp and packaging production in the EU. These companies are Smurfit Kappa, Mondi, Sappi, DS Smith, UPM-Kymmene, Svenska Cellulosa AB (SCA) and Stora Enso, all of which have established a European Works Council in which delegates from the workforce in the different countries are informed and consulted by the central management of these companies. These companies appear as the largest employers in several countries in Table 39 in Annex 1.

To illustrate the structural differences between the countries, Table 5 shows the share of sector employment in the three largest companies (individually and in sum) in each country. Slovakia is the country with the highest share of employment in the three largest paper companies (49.6%), though the number of sector employees in this country is relatively small. In Germany, which has the highest number of sector employees, 8.9% are employed in the three largest companies. More details of the largest companies in each country can be found in Table 39 in Annex 1.

Table 5: Share of employment in the three largest companies in the paper sector, by country

	Number of employees in the paper sector	Share of employment in the largest paper company (%)	Share of employment in the second-largest paper company (%)	Share of employment in the third-largest paper company (%)	Share of employment in the three largest paper companies (%)
AT	16,675	7.4	5.4	4.8	17.6
BE	10,955	4.8	4.6	5.3	14.7
BG	10,309	3.4	4.9	1.6	9.8
CY	596	17.6	13.4	n.d.	31.0
CZ	20,614	3.5	2.0	1.0	6.5
DE	144,021	3.5	3.1	2.3	8.9
DK	4,717	n.d.	n.d.	n.d.	n.d.
EE	1,367	27.2	7.5	6.7	41.5
EL	7,307	6.0	4.4	2.6	13.0
ES	43,139	4.0	1.5	1.4	6.9
FI	21,979	n.d.	n.d.	n.d.	n.d.
FR	64,655	8.4	3.9	4.1	16.3
HR	4,481	9.6	4.5	3.3	17.4
HU	14,913	4.2	1.1	1.0	6.3
IE	3,134	n.d.	n.d.	n.d.	n.d.
IT	71,222	4.2	2.4	0.9	7.5
LT	4,609	6.1	3.9	3.1	13.1
LU	n.d.	n.d.	n.d.	n.d.	n.d.
LV	1,429	10.1	7.3	9.3	26.7
MT	n.d.	n.d.	n.d.	n.d.	n.d.
NL	17,118	1.2	1.2	1.1	3.4
PL	58,081	4.3	2.1	1.7	8.1
PT	10,435	26.8	3.3	2.6	32.7
RO	14,380	7.5	4.2	3.1	14.7
SE	33,979	15.2	12.9	12.1	40.3
SI	4,271	16.4	8.2	9.0	33.6
SK	6,956	25.9	13.7	10.1	49.6
UK	57,077	8.6	5.3	1.8	15.6

Note: n.d. = no data.

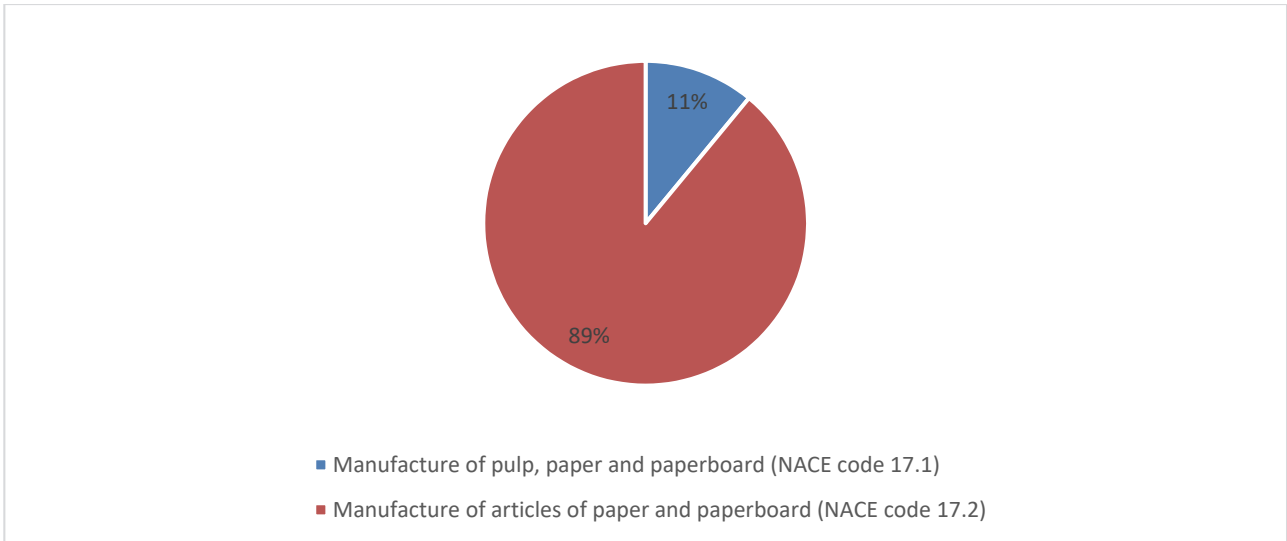
Source: Network of Eurofound Correspondents³

The two subsectors differ somewhat in terms of company characteristics, with the paper and pulp producing enterprises being more energy intensive. Comparison of the two subsectors according to distribution of employment and proportion of companies (shown in Figure 2 and Figure 6, respectively) allows us to conclude that the average number of employees in companies manufacturing pulp, paper and paperboard is higher than that in companies manufacturing articles of paper and paperboard. Furthermore,

³ Unless otherwise specified, the source for tables and figures in the report is the Network of Eurofound Correspondents.

looking at CEPI’s figures for paper and pulp production (primarily NACE 17.1), it is clear that the long-term trend is of decreasing numbers of employees per mill – from an average of just over 250 in the early 1990s to around 200 in 2018 (CEPI, 2019b).

Figure 6: Share of companies in the two subsectors (%), 2016

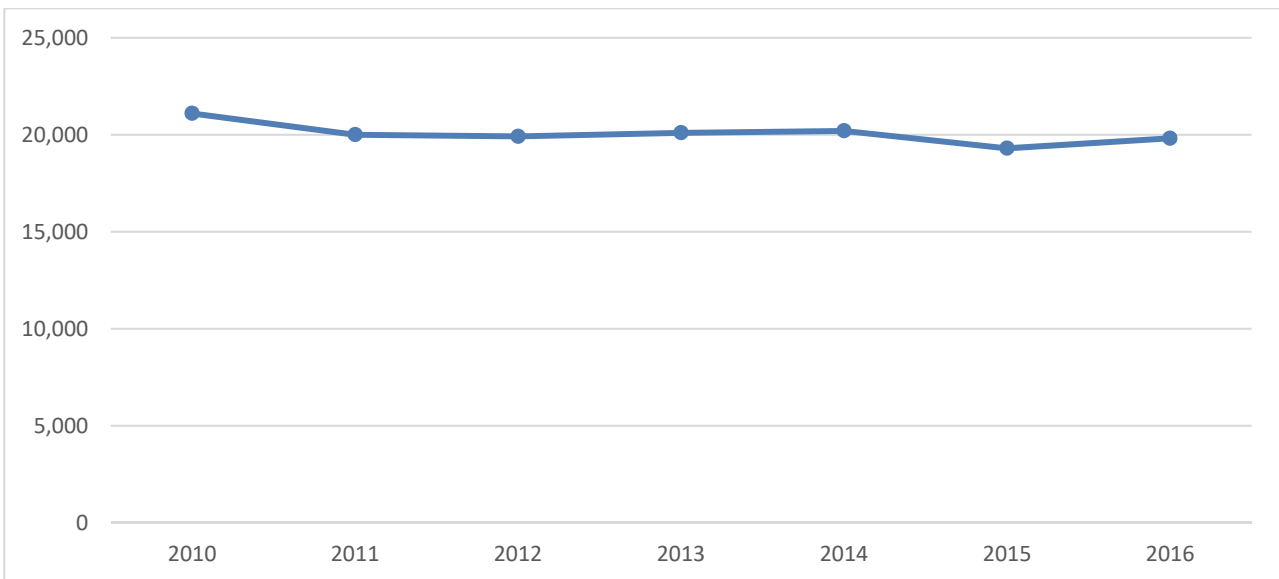


Note: Data are missing for Cyprus and Malta.

Source: Eurostat, Structural Business Statistics, 2016

The total number of companies active in the sector has also been fairly stable between 2010 and 2016 (Figure 7). The minor overall decrease occurred among companies of all sizes. This decrease could be due to some level of consolidation in the sector, which has been a trend in parts of the industry. According to a McKinsey report, the world’s largest paper and forest products companies have remained fairly stable size-wise, but they have focused their efforts on fewer segments, which means that concentration has increased (Berg and Lingqvist, 2019).

Figure 7: Number of companies in the paper sector, 2010–2016



Source: Eurostat, Structural Business Statistics, 2016

The paper sector has fairly high profit margins and high returns due to its use of low-cost raw materials, mainly fibre. In 2016, the total turnover of the EU paper sector was about €190 billion. Turnover was

highest in Germany (€41 billion), followed by Italy (€22 billion) and Finland (€21 billion), and lowest in countries where the sector is not very large, such as in Cyprus (€55 million). Turnover in the paper sector rose steadily between 2010 and 2016.

The turnover from the paper sector in the EU corresponds to about 1.27% of the total turnover in the EU economy. At the national level, turnover from the paper sector as a share of total turnover was highest in Finland (10%), followed by Sweden (3%). The sector had the least economic influence in Ireland (0.2%), followed by Cyprus (0.3%) and Latvia (0.5%).

The paper sector is transforming. While the demand for graphic paper is declining, the demand for packaging is growing worldwide, along with tissue papers and pulp for hygiene products (Berg and Lingqvist, 2019). In terms of the future for the sector, the European Commission's 2013 blueprint for forest-based industries underlined a number of challenges that the pulp and paper industry has to address to remain competitive (European Commission, 2013, p. 345). These included lower consumption of graphic paper (which seems to be offset by the growth in packaging and hygiene paper products), trade barriers, sustainability and supply of raw materials, the paper recycling rate in Europe being close to its maximum, and energy prices. Opportunities for the sector include technological development to further reduce environmental impact and optimise the use of resources, as well as the opportunities offered by the bio-economy, such as the potential for new products, materials, fuels and chemicals. The paper sector could also benefit from increased concerns over plastic waste and emissions from fossil-based materials used in packaging and disposable products.

In a study carried out in 2017, experts on the paper and pulp industry were asked to give their views on the coming decade for the sector (Toppinen et al, 2017). According to many of the experts, consolidation will continue, thereby concentrating the sector even further. Employment-wise, most experts do not expect the industry to grow; rather, they think it will be a similar size or smaller by 2030. In terms of company structure, many thought there would probably be larger mills and companies but also smaller-scale, specialised producers serving niche or geographically limited local markets.

The experts were also asked to give their views on long-term business survival and vitality. Many of them stated that the industry's future depends on its ability to utilise the raw materials base and pulp innovatively and to create new businesses and value streams. And, in addition to the products traditionally produced in the sector (pulp, paper, board, packaging and tissue), the main sources of revenue in 2030 are likely to include energy, biofuel, composites, biochemicals and biomaterials, paper and packaging products with intelligent properties, and fibre-based innovations (Toppinen et al, 2017).

Looking even further ahead, the vision of European associations active in the EU forest-based industries (CEPI among them) for the sector in 2050 is that the industries and their value chains will continue to provide a green and attractive sector with great potential for job creation (CEPI, 2019a).

2. National level of interest representation

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

There are 68 sector-related trade unions in 25 Member States and the UK, and 39 sector-related employer organisations/business associations in 22 Member States and the UK. Of the 39 organisations at the management side, 37 can be considered as employer organisations as they are involved in collective bargaining or affiliated to a European social partner organisation – the two grounds on which they can be granted the status of employer organisation. The two other organisations in Greece and Lithuania are, therefore, not considered as employer organisations in this report. A full list of these organisations can be found in Table 37 in Annex 1.

Table 6: Number of sector-related organisations per country, 2019

Number of sector-related organisations	Countries with the respective number of trade unions in the paper sector	Countries with the respective number of employer organisations/business associations in the paper sector
0	CY, EE	CY, EE, HU, LU, MT
1	DK, EL, HR, HU, LT, LU, MT, RO, SI, SK	BG, CZ, DK, EL, FI, HR, IE, LT, LV, PL, RO, SK, UK
2	AT, DE, ES, LV, NL, PL	FR, NL, SE, SI
3	IE, UK	AT, BE, DE, ES, IT, PT
4	BG, CZ, FR, IT	
5	BE, SE	
7	FI, PT	
	68 trade unions in 25 Member States and the UK	37 employers organisations and 2 business associations in 22 Member States and the UK

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Thus, there is at least one trade union active in the sector in 25 Member States and the UK and at least one employer organisation in 22 Member States and the UK. In Cyprus and Estonia, there are no trade unions or employer organisations in the sector. Other countries with no employer organisations in the sector are Hungary, Luxembourg and Malta. Apart from Hungary, the paper sector is very small in each of these countries.

The number of trade unions active per country varies from none to seven – Finland and Portugal having the highest numbers of sector-related trade unions. The number of employer organisations per country is a lot lower, three being the maximum, and around half of the Member States have only one organisation in the sector.

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

Of the 68 trade unions active in the sector, 59 (87%) organise workers in both NACE codes encompassing the paper sector (in 23 countries). Five trade unions cover only the manufacture of pulp, paper and paperboard (NACE code 17.1), and four cover only the manufacture of articles of paper and paper board (NACE code 17.2). More detailed breakdowns of trade union representation in the paper sector by NACE code are shown in Table 7 and Table 8.

Table 7: Share of trade unions covering all or part of the sector (number and %)

	NACE 17.1	NACE 17.2
Trade unions covering both NACE codes	59 (87%)	
Trade unions with members in only one of the NACE codes	5 (AT, BG, CZ, DE)	4 (DE, MT, SE, UK)
Total	64 (94%)	63 (93%)

Only Germany and Malta do not have a trade union that covers both NACE codes. In Germany, there are two trade unions covering each part of the sector separately. Malta has just one trade union covering the manufacture of articles of paper and paperboard; there are no companies active in the manufacture of pulp, paper and paperboard in this country.

Table 8: Sector coverage of trade unions, 2019

	Trade union	NACE 17.1	NACE 17.2
AT	GPA-djp	Yes	Yes
	PRO-GE	Yes	No
BE	ABVV-FGTB	Yes	Yes
	ACV-BIE	Yes	Yes
	CNE	Yes	Yes
	ACLVB-CGSLB	Yes	Yes
	BBTK-SETCa	Yes	Yes
BG	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry	Yes	Yes
	Federation of Light Industry/Podkrepa	Yes	Yes
	National Labour Federation 'Chemistry and Industry'	Yes	No
	Federation 'Chemistry'	Yes	No
CY	No trade unions in the sector		
CZ	OS DLV ČR	Yes	Yes
	OS ECHO	Yes	No
	Č-MOS	Yes	Yes
	SNO	Yes	Yes
DE	IGBCE	Yes	No
	ver.di	No	Yes
DK	3F	Yes	Yes
	HK Privat ^a		Yes
EE	No trade unions in the sector		
EL	Federation of Press and Paper Industry Employees of Greece	Yes	Yes
ES	FSC-CCOO	Yes	Yes
	FICA-UGT	Yes	Yes
FI	Paperiliitto	Yes	Yes
	Pro	Yes	Yes
	YTN ^b	Yes	Yes
	IL	Yes	Yes
	TEK	Yes	Yes
	Sähköliitto	Yes	Yes
	Suomen konepäällystöliitto	Yes	Yes
FR	FG-FO	Yes	Yes

	Filpac-CGT	Yes	Yes
	FCE-CFDT	Yes	Yes
	FIBOPA CFE-CGC	Yes	Yes
HR	SSH	Yes	Yes
HU	VDSZ	Yes	Yes
IE	SIPTU	Yes	Yes
	Connect	Yes	Yes
	Unite	Yes	Yes
IT	SLC-CGIL	Yes	Yes
	FISTEL-CISL	Yes	Yes
	UILCOM-UIL	Yes	Yes
	UGL Carta e Stampa	Yes	Yes
LT	LMPF	Yes	Yes
LU	OGB-L	Yes	Yes
LV	LPNA	Yes	Yes
	LMNA	Yes	Yes
MT	GWU	No	Yes
NL	CNV Vakmensen	Yes	Yes
	FNV Procesindustrie	Yes	Yes
PL	KSPCh NSZZ 'Solidarnosc'	Yes	Yes
	MZZP IP Sp. z o.o. w Kwidzynie	Yes	Yes
PT	FIEQUIMETAL	Yes	Yes
	SINDETELCO	Yes	Yes
	SITEMAQ	Yes	Yes
	SIFOMATE	Yes	Yes
	SIMA	Yes	Yes
	SITese	Yes	Yes
	SINDEQ	Yes	Yes
RO	FMLCH	Yes	Yes
SE	Ledarna	Yes	Yes
	Unionen	Yes	Yes
	Sveriges Ingenjörer	Yes	Yes
	Pappers	Yes	Yes
	GS-facket	No	Yes
SI	SPDS-KSS PERGAM	Yes	Yes
SK	OZ DLV	Yes	Yes
UK	Unite the Union	Yes	Yes
	GMB	Yes	Yes
	USDAW	No	Yes

Notes: ^a HK Privat is only involved in graphical printing, not in paper production. It was included here on the request of UNI Europa, in this table only, but not in the rest of the report. As Table 6 shows, there is only one paper sector trade union in Denmark: 3F. ^b IL and TEK are member organisations of YTN. Members of IndustriAll Europe are shown in bold. Green shading indicates a positive response.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Two of the trade unions included in Table 8 are borderline cases in terms of the methodology of this report. The Federation of Press and Paper Industry Employees of Greece is neither a member of a European sector-related trade union nor currently a signatory party to any collective agreements in the sector. However,

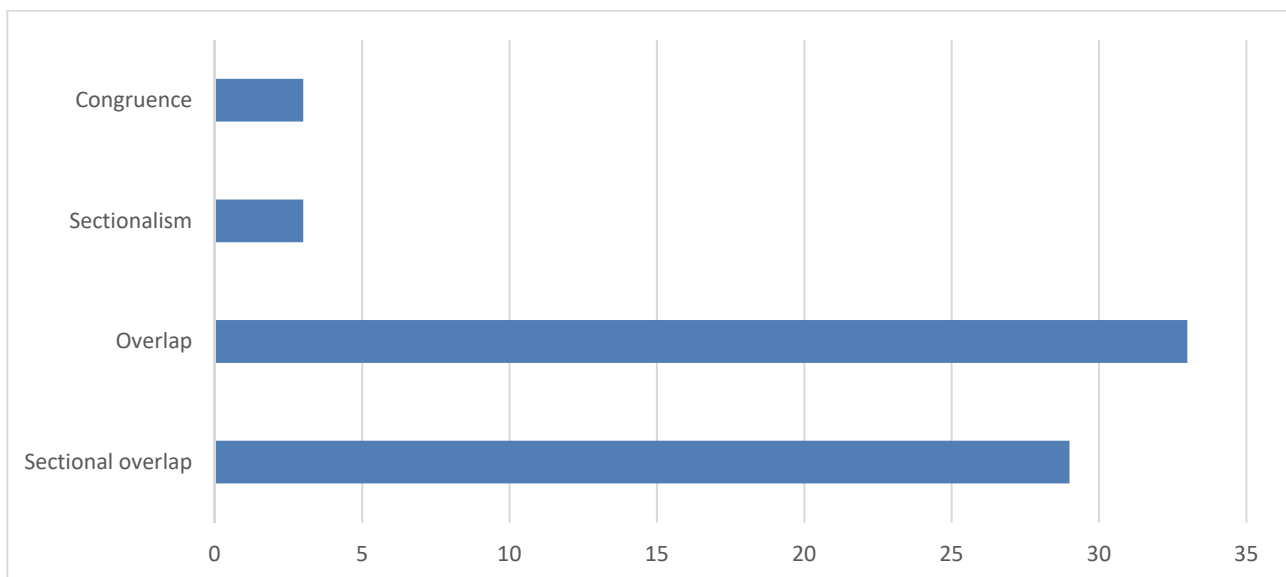
negotiations are underway for a new agreement between this union and its employer counterpart in the sector; thus, it has been included here as a sector-related trade union.

In Finland, the Federation of Professional and Managerial Staff (YTN) negotiates on behalf of employees with an academic degree. The organisation is not a member of a European trade union. However, its two members in the paper sector – The Academic Engineers and Architects (TEK) and Union of Professional Engineers in Finland (IL) – are affiliated to IndustriAll Europe. Additionally, although these three organisations are not currently signatory parties to any sectoral collective agreement, they have been previously; there are also no formal obstacles, in representativeness terms, to them being involved in bargaining, which implies that the potential exists. Thus, these organisations have been included in this report.

The sector-relatedness of trade unions has been assessed above as to whether their membership includes affiliates in the two main parts of the sector, covering NACE codes 17.1 and 17.2. Additional factors regarding their sector-relatedness include whether all categories of employees (white- and blue-collar workers) are covered, whether employees in the larger and the smaller companies are covered, and whether employees in all parts of the country can be part of the trade union. On the basis of these factors, an organisation is categorised as being congruent with the sector or as having an overlapping, a sectional or a sectional overlapping membership domain. The overlapping domains indicate links with other sectors, while sectionalism might contribute to fragmentation (if different organisations cover different parts of the sector) or pluralism (if different organisations have similar membership).

Figure 8 shows the number of trade unions in the paper sector that fall into the four categories of sector-relatedness (see Table 2).

Figure 8: Membership domain of trade unions in the paper sector (number), 2019



Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Only three trade unions (4% of the total) have a congruent membership domain. These are in Hungary,⁴ Poland and Slovenia (Table 9). The vast majority of trade unions cover other sectors in addition to the paper sector. The most common type of domain is 'overlap', meaning that a union covers the whole of the paper sector (as defined in this study) and also parts of other sectors. This is the case for 33 trade unions (in

⁴ The trade union covers all activities in the sector with the exception of the production of hygiene products.

AT, BE, BG, CZ, ES, FR, HR, IT, LT, LU, LV, NL, PL, PT, SK and the UK), many of these being of a general character, covering many types of workers in many different sectors.

Combining the trade unions with a congruent membership domain and those with an overlapping domain gives the total number of trade unions that cover the entire paper sector. This is the case for 36 trade unions out of the total 68 (53%), and these unions represent 18 of the countries altogether.

The ‘sectional overlap’ domain is also common among trade unions in the paper sector. Twenty-nine of them (in AT, BE, BG, CZ, DE, DK, EL, FI, IE, MT, RO, SE and the UK) cover only a part of the sector. These unions often cover a specific occupation (for example, electricians) or type of worker (for example, white-collar workers in the private sector), but they cover these categories in all or most sectors. Three trade unions (in CZ, FI and SE) cover only a part of the paper sector and have no members in any other sector. This type of membership domain is called ‘sectionalism’.

Combining trade unions with an overlapping membership domain and those with sectional overlap gives all the unions that have members in other sectors as well as the paper sector. In total, 62 trade unions (91%) also have members in other sectors. Comparison with the proportion of trade unions that cover the paper sector only provides an indication of how closely the definition of the paper sector fits with the reality of trade unions’ membership domains. Just six trade unions (9%) only have members in the paper sector, so it is clear that the definition of the sector does not account for actual membership domains particularly well.

Table 9: Membership domain of trade unions in the paper sector, 2019

	Congruence	Sectionalism	Overlap	Sectional overlap
AT			GPA-djp	PRO-GE
BE			ACV-BIE, ACLVB-CGSLB	ABVV-FGTB, CNE, BBTK-SETCa
BG			Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry	Federation of Light Industry/Podkrepa, National Labour Federation ‘Chemistry and Industry’, Federation ‘Chemistry’
CY	No trade unions in the sector			
CZ		Č-MOS	OS DLV ČR	OS ECHO, SNO
DE				IGBCE, ver.di
DK				3F
EE	No trade unions in the sector			
EL				Federation of Press and Paper Industry Employees of Greece
ES			FSC-CCOO, FICA-UGT	
FI		Paperiliitto		Pro, YTN, IL, TEK, Sähköliitto, Suomen konepäällystöliitto
FR			FG-FO, Filpac-CGT, FCE-CFDT, FIBOPA CFE-CGC	
HR			SSH	
HU	VDSZ ^a			
IE				SIPTU, Connect, Unite

IT			SLC-CGIL, FISTEL-CISL, UILCOM-UIL, UGL Carta e Stampa	
LT			LMPF	
LU			OGB-L	
LV			LPNA, LMNA	
MT				GWU
NL			CNV Vakmensen, FNV Procesindustrie	
PL	MZZP IP Sp. z o.o. w Kwidzynie ^b		KSPCh NSZZ 'Solidarnosc'	
PT			FIEQUIMETAL, SINDETELCO, SITEMAQ, SIFOMATE, SIMA, SITESE, SINDEQ	
RO				FMLCH
SE		Pappers		Ledarna, Unionen, Sveriges Ingenjörer , GS- facket
SI	SPDS-KSS PERGAM			
SK			OZ DLV	
UK			Unite the Union, GMB	USDAW

Notes: ^a VDSZ covers all activities in the sector with the exception of hygiene products. ^b MZZP IP Sp. z o.o. w Kwidzynie has a congruent domain, but it only represents workers in one company. Members of IndustriAll Europe are shown in bold.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

In what follows, the membership strength (organisational density) of trade unions in the paper sector is assessed. Table 10 shows the organisational density of those trade unions for which data are available. Two main problems arise. First, several unions do not provide the information required to calculate density, suggesting that organisational density will be underestimated. Second, unions that do provide membership figures might not operate according to the same sectoral definition as the ESSDC, thus probably leading to overestimation of union density (as unions tend to have an overlapping domain). The size of these two errors cannot be estimated. Extra caution is needed as there is no information on trade union density in France, Germany and the Netherlands, all three countries with a large number of employees in the paper sector. On the basis of the available data, more than 125,000 trade union members can be counted.

Ranging from 2% in Lithuania up to 80% in Finland, trade union density rates vary greatly between countries. In addition to Finland, trade union coverage is estimated to be over 50% in Belgium, Slovenia and Sweden.

Table 10: Organisational density of trade unions

	Number of sector employees (2016)	Number of unions covered by data	Number of trade union members in the sector	Density based on trade union data (%)
AT	16,675	1 out of 2	5,500	33
BE	10,955	2 out of 5	7,824	71
BG	10,309	3 out of 4	909	9
CY	596	No trade unions in the sector		
CZ	20,614	All	2,221	11
DE	144,021	None	n.d.	n.d.
DK	4,717	All	2,260	48

EE	1,367	No trade unions in the sector		
EL	7,307	None	n.d.	n.d.
ES	43,139	All	18,000	42
FI	21,979	3 out of 6(7) ^a	17,678	80
FR	64,655	None	n.d.	n.d.
HR	4,481	All	1,200	27
HU	14,913	All	1,311	9
IE	3,134	None	n.d.	n.d.
IT	71,222	1 out of 4	30,000	42
LT	4,609	All	100	2
LU	n.d.	All	160	n.d.
LV	1,429	All	45	3
MT	n.d.	All	120	n.d.
NL	17,118	None	n.d.	n.d.
PL	58,081	1 out of 2	2,422	4
PT	10,435	All	2,790	27
RO	14,380	All	2,020	14
SE	33,979	All	24,798	73
SI	4,271	All	2,500	59
SK	6,956	None	n.d.	n.d.
UK	57,077	1 out of 3	3,500	6

Notes: ^a Data covers three out of the six trade unions with exclusive membership. Membership figures for the seventh trade union, YTN, overlaps with those of TEK and IL and have therefore not been included. n.d. = no data.

Sources: Eurostat, Structural Business Statistics, 2016; Network of Eurofound Correspondents' national contributions to this study, 2019

Trade union involvement in collective bargaining or social dialogue

In the previous section, the sector-relatedness and membership strength of trade unions was considered, while in this section their involvement in collective bargaining is analysed. Table 11 shows whether trade unions are involved in single- and/or multi-employer bargaining. Single-employer bargaining covers only the workers employed by a specific employer, while multi-employer bargaining covers all employees of the member companies of employer organisations covered by the agreement. Also included in Table 11 is the share of workers covered by such agreements.

The data regarding what proportion of the workforce is covered by collective bargaining are based on estimates that have been either provided by members of the Network of Eurofound Correspondents or inferred from general information about collective bargaining coverage (particularly where such coverage is near universal) and systems for the extension of collective agreements (see, for example, Eurofound, 2015; Oesingmann, 2016).

In each of the Member States (except Cyprus and Estonia) where there are sector-related trade unions, at least one trade union is involved in collective bargaining. In fact, only 3 of the 68 trade unions included in this report are not involved in either single-employer or multi-employer bargaining: the three Finnish trade unions YTN, IL and TEK. Although, as discussed above in the section 'Sector coverage, sector-relatedness and organisational density of trade unions', these three organisations have potential for future bargaining.

Table 11: Involvement of trade unions in the paper sector in collective bargaining, 2019

	Trade union	MEB 17.1	MEB 17.2	SEB 17.1	SEB 17.2	Percentage covered by MEB + SEB	Percentage covered by MEB only
AT	GPA-djp	Yes	Yes	No	No	100% (ext.)	100% (ext.)
	PRO-GE	Yes	No	No	No		
BE	ABVV-FGTB	Yes	Yes	Yes	Yes	100% (ext.)	100% (ext.)
	ACV-BIE	Yes	Yes	Yes	Yes		
	CNE	Yes	Yes	Yes	Yes		
	ACLVB-CGSLB	Yes	Yes	Yes	Yes		
	BBTK-SETCa	Yes	Yes	Yes	Yes		
BG	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry	Yes	Yes	Yes	Yes	26% in 17.1 13% in 17.2	10% in 17.1 10% in 17.2
	Federation of Light Industry/Podkrepa	Yes	Yes	Yes	Yes		
	National Labour Federation 'Chemistry and Industry'	No	No	Yes	No		
	Federation 'Chemistry'	No	No	Yes	No		
CY	No trade unions in the sector; no collective bargaining						
CZ	OS DLV ČR	Yes	Yes	Yes	Yes	20%	7% in 17.1 28% in 17.2
	OS ECHO	No	No	Yes	No		
	Č-MOS	Yes	Yes	Yes	Yes		
	SNO	Yes	Yes	Yes	Yes		
DE	IGBCE	Yes	No	Yes	No	80% in 17.1	80% in 17.1
	ver.di	No	Yes	No	Yes	60% in 17.2	60% in 17.2
DK	3F	Yes	Yes	No	No	70%	70%
EE	No trade unions in the sector; no collective bargaining						
EL	Federation of Press and Paper Industry Employees of Greece	Yes	Yes	No	No	n.d.	n.d.
ES	FSC-CCOO	Yes	Yes	Yes	Yes	80–85%	70–75%
	FICA-UGT	Yes	Yes	Yes	Yes		
FI	Paperiliitto	Yes	Yes	No	Yes	92%	92%
	Pro	Yes	Yes	No	No		
	YTN	No	No	No	No		
	IL	No	No	No	No		
	TEK	No	No	No	No		
	Sähköliitto	Yes	Yes	n/a	n/a		
	Suomen konepäällystöliitto	Yes	Yes	n/a	n/a		
FR	FG-FO	Yes	Yes	Yes	Yes	90–100% in 17.1	90–100% in 17.1
	Filpac-CGT	Yes	Yes	Yes	Yes		
	FCE-CFDT	Yes	Yes	Yes	Yes	100% in 17.2	100% in 17.2
	FIBOPA CFE-CGC	Yes	Yes	Yes	Yes		
HR	SSH	No	No	Yes	Yes	55–60%	55–60%
HU	VDSZ	No	No	Yes	Yes	100% in 17.1 31% in 17.2	100% in 17.1 4% in 17.2
IE	SIPTU	No	No	Yes	Yes	Likely below 25% in 17.1	0%
	Connect	No	No	Yes	Yes	Likely below 50% in 17.2	
	Unite	No	No	Yes	Yes		

IT	SLC-CGIL	Yes	Yes	Yes	Yes	100% in 17.1	100% in 17.1
	FISTEL-CISL	Yes	Yes	Yes	Yes	100% in 17.2	100% in 17.2
	UILCOM-UIL	Yes	Yes	Yes	Yes		
	UGL Carta e Stampa	Yes	Yes	n/a	n/a		
LT	LMPF	No	No	Yes	Yes	4–7%	0%
LU	OGB-L	No	No	Yes	Yes	100% in 17.1 83% in 17.2	0%
LV	LPNA	No	No	No	Yes	n.d.	0%
	LMNA	Yes	Yes	No	Yes		
MT	GWU	No	No	No	Yes	n.d. in 17.1 43% in 17.2	n.d.
NL	CNV Vakmensen	Yes	Yes	Yes	Yes	100% (in principle)	n.d.
	FNV Procesindustrie	Yes	Yes	Yes	Yes		
PL	KSPCh NSZZ 'Solidarnosc'	No	No	Yes	Yes	10% (maximum)	0%
	MZZP IP Sp. z o.o. w Kwidzynie	No	No	Yes	Yes		
PT	FIEQUIMETAL	Yes	Yes	Yes	Yes	90% (minimum)	90% (minimum)
	SINDETELCO	Yes	Yes	Yes	No		
	SITEMAQ	Yes	Yes	Yes	No		
	SIFOMATE	No	No	Yes	No		
	SIMA	No	No	Yes	No		
	SITese	Yes	Yes	Yes	Yes		
	SINDEQ	Yes	Yes	Yes	Yes		
RO	FMLCH	No	No	Yes	Yes	25% in 17.1 10% in 17.2	0%
SE	Ledarna	Yes	Yes	No	No	88% (minimum)	88% (minimum)
	Unionen	Yes	Yes	No	No		
	Sveriges Ingenjörer	Yes	Yes	No	No		
	Pappers	Yes	Yes	No	No		
	GS-facket	No	Yes	No	No		
SI	SPDS-KSS PERGAM	Yes	Yes	Yes	Yes	100%	100%
SK	OZ DLV	Yes	Yes	Yes	Yes	32% in 17.1 21% in 17.2	32% in 17.1 17% in 17.2
UK	Unite the Union	Yes	Yes	Yes	Yes	n.d.	6%
	GMB	Yes	Yes	Yes	Yes		
	USDAW	No	No	No	Yes		

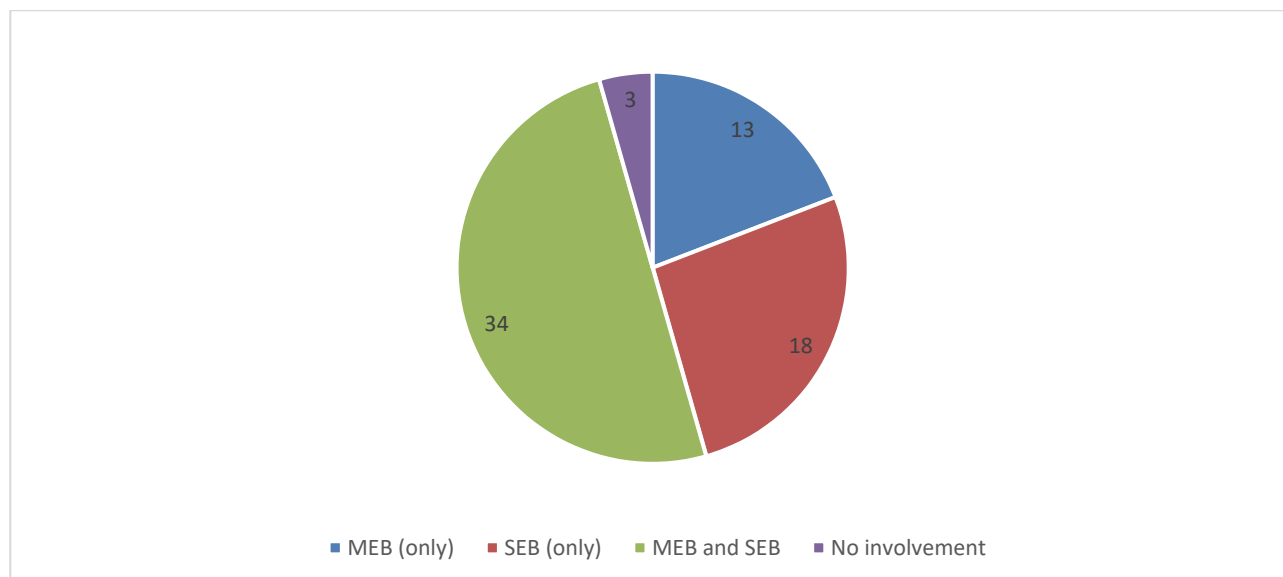
Notes: SEB = single-employer bargaining. MEB = multi-employer bargaining. n.d. = no data. n/a (with grey shading) = not applicable. Trade unions that are members of IndustriAll Europe are marked in bold. Green shading indicates a positive response.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

In 18 countries (AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, IT, LV, NL, PT, SE, SI, SK and the UK), trade unions are involved in multi-employer bargaining. In 14 of these countries (BE, BG, CZ, DE, ES, FI, FR, IT, LV, NL, PT, SI, SK and the UK), trade unions combine single-employer and multi-employer bargaining. In eight other countries (HR, HU, IE, LT, LU, MT, PL and RO), trade unions are involved in single-employer bargaining only. In total, 45 trade unions are involved in multi-employer bargaining in NACE codes 17.1 and 17.2, while 46 are involved in single-employer bargaining in NACE code 17.1 and 44 in NACE code 17.2.

Figure 9 shows the involvement of trade unions in collective bargaining. The vast majority (65 trade unions, or 96% of the total) are involved in collective bargaining. One-half (34 unions) are involved in both single-employer and multi-employer bargaining. Just under one-fifth (19%) are involved in multi-employer bargaining only, and just over one-quarter (26%) are involved in single-employer bargaining only.

Figure 9: Involvement of trade unions in different forms of collective bargaining (number of trade unions), 2019



Notes: $n = 68$. SEB = single-employer bargaining. MEB = multi-employer bargaining. The three trade unions (two Finnish and one Italian) for which no data were available on single-employer bargaining were classified as 'MEB (only)'.

Source: Based on information from Network of Eurofound Correspondents' national contributions to this study, 2019

Collective bargaining coverage varies considerably between Member States, from full coverage in countries with extension mechanisms (such as Austria) to somewhere between 4% and 7% in Lithuania (Table 11). In almost all Member States where it was possible to differentiate bargaining according to the two subsectors, the coverage is higher in paper and pulp production (NACE 17.1) (in BG, DE, HU, LU, RO and SK). Only in Ireland is coverage higher in production of paper articles (NACE 17.2). In most of these countries, production of paper articles is the larger of the two subsectors in terms of employment. While a clear pattern cannot be confirmed due to the scarcity of data, this finding might reflect the fact that companies in NACE code 17.2 are smaller on average and, thus, more difficult to organise.

Coverage, sector-relatedness and organisational density of employer organisations

The search for employer organisations in the paper sector identified a total of 39 organisations⁵ in 22 Member States and the UK, but, as noted above, only 37 of these are considered as employer organisations in this report. Because the organisations in Greece and Lithuania are not involved in collective bargaining and not affiliated to a European social partner organisation, they are considered to be business associations.

Among the 39 organisations identified, fragmentation is fairly low, the maximum number of sector-related employer organisations in a single country being just three. The representation by employer organisations/business associations in the paper sector is broken down according to NACE codes in Table

⁵ As was indicated in Table 6, there are 37 employer organisations and 2 business associations in the paper sector.

12 and Table 13. Of the 39 organisations, 27 cover both NACE codes, 4 cover NACE code 17.1 only, and 8 cover NACE code 17.2 only (Table 12).

Table 12: Employer organisations/business associations covering all or part of the sector (number and %)

	NACE 17.1	NACE 17.2
Organisations covering both NACE codes	27 (69%) (BE, BG, CZ, DE, DK, EL, ES, FI, FR, HR, IE, IT, LT, NL, PL, RO, SE, SI, SK, UK)	
Organisations with members in only one of the NACE codes	4 (10%) (AT, BE, IT)	8 (20%) (AT, BE, DE, ES, FR, IT, LV)
Total	31 (79%)	35 (90%)

As can be seen in Table 13, Austria and Latvia are the only two countries where none of these organisations cover both NACE codes. In Austria, however, the three organisations together provide full coverage. In Latvia, NACE code 17.1 is not covered. This is fairly unsurprising as that particular subsector is very small, employing just 12 workers as of 2017.

Table 13: Sector coverage of employer organisations/business associations, 2019

	Organisation	NACE 17.1	NACE 17.2
AT	FVPI	Yes	No
	Austropapier	Yes	No
	PROPAK	No	Yes
BE	Cobelpa	Yes	No
	Fetra	No	Yes
	Indufed ^a	Yes	Yes
BG	Branch Chamber of the Bulgarian Pulp and Paper Industry	Yes	Yes
CY	No employer organisations in the sector		
CZ	ACPP	Yes	Yes
DE	HPV	No	Yes
	VAP	Yes	Yes
	VDP	Yes	Yes
DK	DI	Yes	Yes
EE	No employer organisations in the sector		
EL	SEV	Yes	Yes
ES	ASPAPPEL	Yes	Yes
	FEIGRAF	No	Yes
	AFCO	No	Yes
FI	Metsäteollisuus	Yes	Yes
FR	UNIDIS/COPACEL^b	Yes	Yes
	CAP/FFCP	No	Yes
HR	HUP UDPI	Yes	Yes
HU	No employer organisations in the sector		
IE	IPF	Yes	Yes
IT	Assografici	No	Yes

	Assocarta	Yes	No
	UNIGEC-Confapi	Yes	Yes
LT	LM	Yes	Yes
LU	No employer organisations in the sector		
LV	LPUA	No	Yes
MT	No employer organisations in the sector		
NL	VNP	Yes	Yes
	Kartoflex	Yes	Yes
PL	SPP^c	Yes	Yes
PT	ANIPC	Yes	Yes
	APIGRAF	Yes	Yes
	CELPA	Yes	Yes
RO	PICH-ROMPAP	Yes	Yes
SE	Grafiska Företagen	Yes	Yes
	Industriarbetsgivarna	Yes	Yes
SI	GZS-ZPPPI	Yes	Yes
	ZDS-Sekcija za les in papir	Yes	Yes
SK	ZCPP-SR	Yes	Yes
UK	CPI	Yes	Yes

Notes: ^a *Indufed* is an umbrella organisation formed from the merger of *Cobelpa*, *Fetra* and a federation of the glass industry (*la Fédération de l'Industrie du Verre*). It is thus not a separate employer organisation. While *Cobelpa* and *Fetra* have merged, for legal and technical reasons the two organisations are legal (sub)entities; in daily practice, one can speak of a single organisation, *Indufed*. One of the technical reasons for this is that it makes it easier for the organisation to maintain presence and continuity at official joint committees. By waiting until the composition of a joint committee is officially renewed, the organisation can apply to participate with its new name and structure. ^b *UNIDIS* is affiliated to *CEPI* via *COPACEL*. ^c *SPP* is not registered as an employer organisation in Poland. Employer organisations that are members of *CEPI* are marked in bold. Green shading indicates a positive response.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

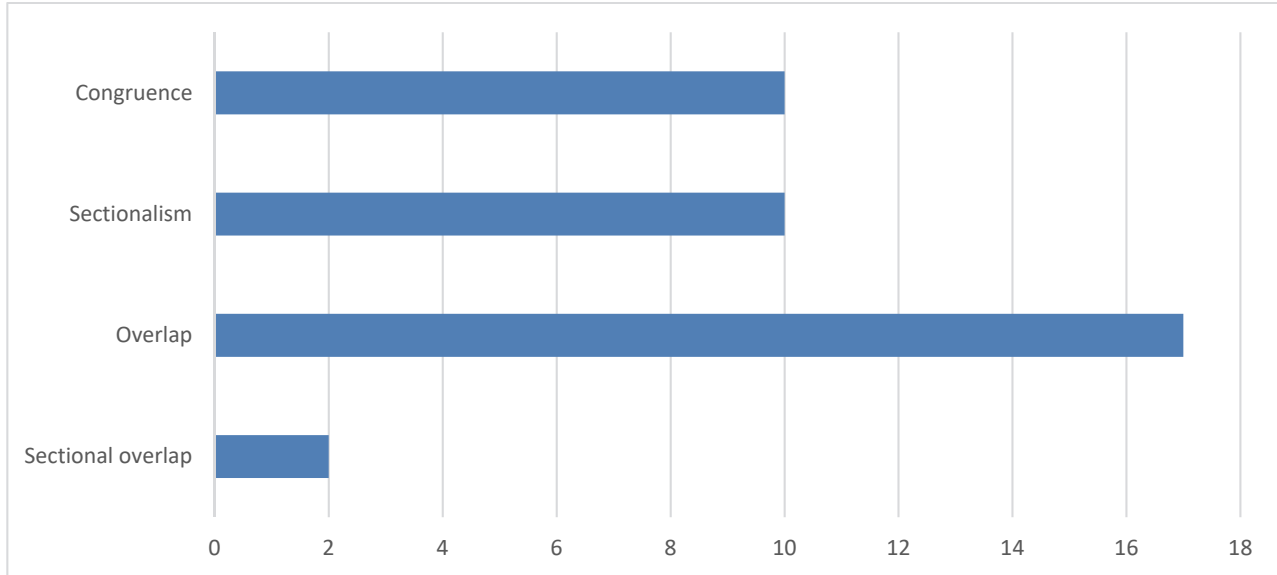
One of the employer organisations included in Table 13 is a borderline case in terms of the methodology of this report: the Greek organisation Hellenic Federation of Enterprises (SEV), which has 12 member companies in the sector and is involved in cross-sectoral bargaining. While there is currently no sectoral agreement in force in the Greek paper sector, negotiations are underway for a new agreement with the Federation of Press and Paper Industry Employees of Greece. For that reason, SEV has been included in the report.

Combining those employer organisations that have a congruent membership domain and those with an overlapping membership domain gives the total that cover the whole of the paper sector. Over two-thirds of the employer organisations identified in this study (27 organisations, or 69% of the total) cover the whole sector, either exclusively (congruence) or alongside other sectors (overlap) (Figure 10 and Table 14). In 21 countries, there is at least one employer organisation covering the entire sector.

The other 12 organisations only cover a part of the sector. Ten of these do not have membership outside the paper sector (sectionalism), while two have membership within as well as outside the paper sector (sectional overlap) (Figure 10 and Table 14).

Combining those employer organisations with overlapping and sectional overlapping domains gives all those that have members who are also active in other sectors. This is the case for 19 organisations (49%) from 15 different countries (Table 14).

Figure 10: Domain coverage of employer organisations/business associations in the paper sector (number), 2019



Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 14: Membership domain of employer organisations/business associations, 2019

	Congruence	Sectionalism	Overlap	Sectional overlap
AT		FVPI, Austropapier, PROPAK		
BE		Cobelpa, Fetra	Indufed*	
BG	Branch Chamber of the Bulgarian Pulp and Paper Industry			
CY	No employer organisations in the sector			
CZ			ACPP	
DE	VAP, VDP	HPV		
DK			DI	
EE	No employer organisations in the sector			
EL			SEV	
ES	ASPAPEL	FEIGRAF, AFCO		
FI			Metsäteollisuus	
FR		CAP/FFCP	UNIDIS/COPACEL**	
HR			HUP UDPI	
HU	No employer organisations in the sector			
IE	IPF			
IT		Assocarta	UNIGEC-Confapi	Assografici
LT			LM	
LU	No employer organisations in the sector			

LV			LPUA
MT	No employer organisations in the sector		
NL	VNP	Kartoflex	
PL	SPP		
PT		ANIPC, APIGRAF, CELPA	
RO	PICH-ROMPAP		
SE		Grafiska Företagen, Industriarbetsgivarna	
SI	GZS-ZPPPI	ZDS-Sekcija za les in papir	
SK		ZCPP-SR	
UK	CPI		

Notes: * *Indufed is not a separate employer organisation, but an umbrella organisation formed from the merger of Cobelpa, Fetra and a federation of the glass industry (see note for Table 13).* ** *UNIDIS is affiliated to CEPI via COPACEL. Employer organisations that are members of CEPI are marked in bold.*

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

In what follows, the membership strength (organisational density) of employer organisations in the paper sector is assessed. Density can be assessed in two different ways: by looking at the share of employers in the paper sector represented by different organisations; or by looking at the share of paper sector employees working in companies organised by specific employer organisations. In some countries (such as Austria and Germany) companies can be members of several employer organisations. This means that some companies will be counted more than once, thus resulting in an overestimation of density. Density in terms of companies covered is highest in Austria, where membership is mandatory, thus amounting to 100% (Table 15).

Table 15: Organisational density of employer organisations in the paper sector

	Number of sector employees (2016)	Number of companies in the sector (2016) (number)	Employer organisations covered by data	Companies covered by employer organisations	Density in terms of companies covered (%)
AT	16,675	135	All	135	100% (mandatory membership)
BE	10,955	224	1 out of 2(3)*	8	4
BG	10,309	512	All	24	5
CY	596	38	No employer organisations in the sector		
CZ	20,614	975	All	14	1
DE	144,021	1,705	All	681	40
DK	4,717	132	All	30	23
EE	1,367	61	No employer organisations in the sector		
EL	7,307	639	All	12	2
ES	43,139	1,652	2 out of 3	163	10
FI	21,979	180	All	23	13
FR	64,655	1,637	All	335	20
HR	4,481	295	All	43	15
HU	14,913	527	No employer organisations in the sector		
IE	3,134	206	None	n.d.	n.d.
IT	71,222	3,763	2 out of 3	378	10
LT	4,609	145	All	3	2

Country	Enterprises	Employees	Employer organisations in the sector	Employees covered by collective bargaining	Employees covered by MEB only
LU	n.d.	3	No employer organisations in the sector		
LV	1,429	109	All	3	3
MT	n.d.	n.d.	No employer organisations in the sector		
NL	17,118	368	All	98	27
PL	58,081	2,830	All	29	1
PT	10,435	571	All	101	18
RO	14,380	764	All	17	2
SE	33,979	391	All	140	36
SI	4,271	173	All	45	26
SK	6,956	340	All	4	1
UK	57,077	1,441	All	79	5

Note: * There are three employer organisations in the paper sector in Belgium: Indufed, Cobelpa and Fetra. As Indufed is the umbrella organisation above Cebelpa and Fetra, its membership is overlapping. As a result, only the membership of Cobelpa and Fetra is counted here to avoid duplication. n.d. = no data.

Sources: Network of Eurofound Correspondents' national contributions to this study, 2019; Structural Business Statistics (for number of enterprises and employees)

Involvement of employer organisations/business associations in collective bargaining

In the previous section, the sector-relatedness and membership strength of employer organisations were considered. This section examines their involvement in collective bargaining and the number of employees covered by collective bargaining agreements signed by these organisations.

In 20 countries at least one employer organisation is involved in collective bargaining (Table 16). In three countries – Greece, Lithuania and Poland – the employer organisations in the paper sector are not involved in collective bargaining. Five countries have no employer organisations in the sector.

Table 16: Involvement of employer organisations/business associations in the paper sector in collective bargaining, 2019

	Organisation	MEB 17.1	MEB 17.2	SEB 17.1	SEB 17.2	Share of sector workforce covered by collective bargaining (MEB + SEB)	Share of sector workforce covered by MEB only
AT	FVPI	Yes	No	No	No	100% (ext.)	100% (ext.)
	Austropapier	No	No	No	No		
	PROPAK	No	Yes	No	No		
BE	Cobelpa	Yes	No	No	No	100% (ext.)	100% (ext.)
	Fetra	No	Yes	No	No		
	Indufed ^a	Yes	Yes	No	No		
BG	Branch Chamber of the Bulgarian Pulp and Paper Industry	Yes	Yes	No ^b	No ^c	26% in 17.1 13% in 17.2	10% in 17.1 10% in 17.2
CY	No employer organisations in the sector						
CZ	ACPP	Yes	Yes	Yes	Yes	20%	7% in 17.1 28% in 17.2
DE	HPV	No	Yes	No	No	80% in 17.1 60% in 17.2	80% in 17.1 60% in 17.2
	VAP	Yes	Yes	No	No		
	VDP	No	No	No	No		

Representativeness of the European social partner organisations: Paper sector

DK	DI	Yes	Yes	No	No	70%	70%
EE	No employer organisations in the sector						
EL	SEV	No	No	No	No	n.d.	n.d.
ES	ASPAPPEL	Yes	No	Yes	No	80–85%	70–75%
	FEIGRAF	No	Yes	No	No		
	AFCO	No	Yes	No	Yes		
FI	Metsäteollisuus	Yes	Yes	No	No	92%	92%
FR	UNIDIS/COPACEL^d	Yes	Yes	No	No	90–100% in 17.1	90–100% in 17.1
	CAP/FFCP	No	Yes	No	No	100% in 17.2	100% in 17.2
HR	HUP UDPI	No	No	Yes	Yes	55–60%	55–60%
HU	No employer organisations in the sector						
IE	IPF	No	No	No	Yes	Likely less than 25% in 17.1 Likely below 50% in 17.2	0%
IT	Assografici	Yes	Yes	No	Yes	100% in 17.1	100% in 17.1
	Assocarta	Yes	Yes	No	No	100% in 17.2	100% in 17.2
	UNIGEC-Confapi	Yes	Yes	No	No		
LT	LM	No	No	No	No	4–7%	0%
LU	No employer organisations in the sector						
LV	LPUA	No	Yes	No	No	n.d.	0%
MT	No employer organisations in the sector						
NL	VNP	No	No	No	No	100% (in principle)	n.d.
	Kartoflex	Yes	Yes	No	No		
PL	SPP	No	No	No	No	10% (maximum)	0%
PT	ANIPC	Yes	Yes	No	No	90% (minimum)	90% (minimum)
	APIGRAF	No	No	No	No		
	CELPA	Yes	No	No	No		
RO	PICH-ROMPAP	Yes	Yes	No	No	25% in 17.1 10% in 17.2	0%
SE	Grafiska Företagen	Yes	Yes	No	No	88% (minimum)	88% (minimum)
	Industriarbetsgivarna	Yes	Yes	No	No		
SI	GZS-ZPPPI	Yes	Yes	No	No	100%	100%
	ZDS-Sekcija za les in papir	Yes	Yes	No	No		
SK	ZCPP-SR	Yes	Yes	No	No	32% in 17.1 21% in 17.2	32% in 17.1 17% in 17.2
UK	CPI	Yes	Yes	No	No	n.d.	6%

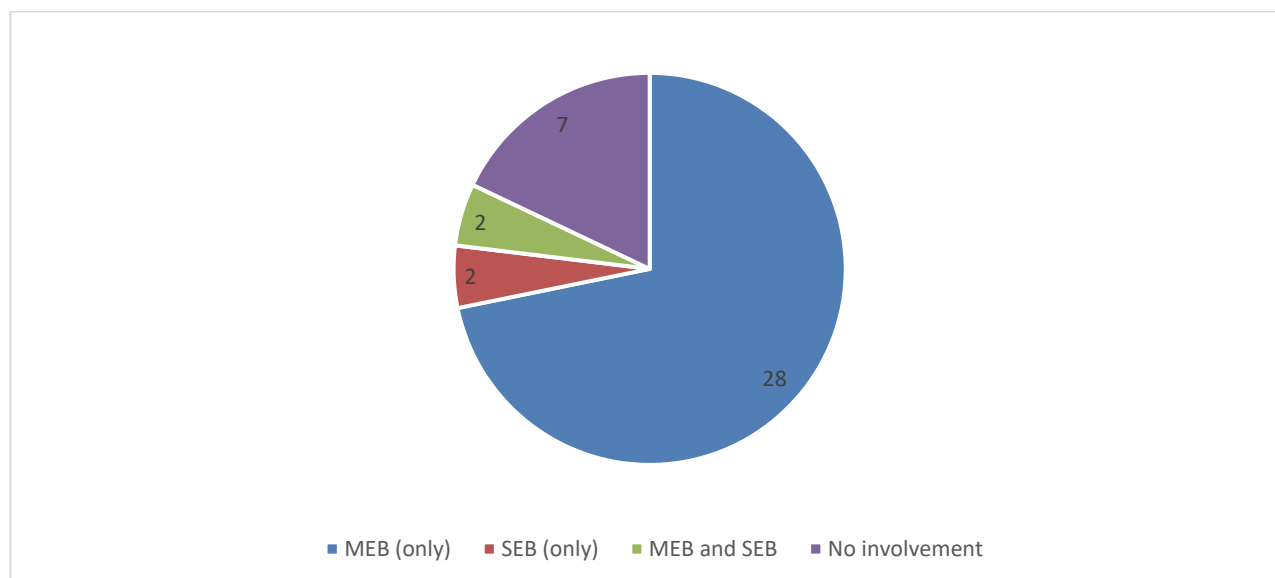
Notes: SEB = single-employer bargaining. MEB = multi-employer bargaining. (Ext) = extension mechanisms that make CB agreements generally binding. n.d. = no data. ^a Indufed is not a separate employer organisation, but an umbrella organisation formed from the merger of Cobelpa, Fetra and a federation of the glass industry (see note for Table 13). ^b Some companies/corporate members of the Branch Chamber of the Bulgarian Pulp and Paper Industry participate in single-employer bargaining for companies under NACE 17.1. ^c Some companies/corporate members of the Branch Chamber of the Bulgarian Pulp and Paper Industry participate in single-employer bargaining for companies under NACE 17.2. ^d UNIDIS is affiliated to CEPI via COPACEL. Employer organisations that are members of CEPI are marked in bold. Green shading indicates a positive response.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

In total, 32 of the 39 employer organisations/business associations (82%) are involved in collective bargaining. Figure 11 provides an overview of the share of single- and multi-employer bargaining in the sector. A total of 30 organisations (77%) are involved in multi-employer bargaining, either exclusively (28) or in combination with single-employer bargaining (2). This covers 18 countries (AT, BE, BG, CZ, DE, DK, ES, FI, FR, IT, LV, NL, PT, RO, SE, SI, SK and the UK).

Only Croatia and Ireland (which account for 5% of the employer organisations in the sector) engage in single-employer bargaining only. This is not surprising as single-employer bargaining generally takes place without the involvement of employer organisations. Seven (18%) of the employer organisations are not involved in any form of collective bargaining. These are found in seven different Member States (AT, DE, EL, LT, NL, PL and PT), and four are affiliated to CEPI (which is why they are included in the study).

Figure 11: Involvement of employer organisations/business associations in collective bargaining (number), 2019



Source: Based on information from Network of Eurofound Correspondents' national contributions to this study, 2019

Collective bargaining patterns and social dialogue practices

As outlined previously, the representativeness of the national social partner organisations is important for the implementation of any agreements made by European-level organisations at the national, regional and local levels. The relevance of European sectoral social dialogue tends to increase along with the ability of national affiliates 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 correlation is also evident in the analysis of paper sector organisations' involvement in bipartite and tripartite bodies, presented in this section. Multi-employer bargaining tends to have greater significance, primarily because of the macroeconomic impact of such agreements. An exception to this rule is the existence of single-employer agreements with very large employers, which serve as industry 'standards'.

The coverage of different types of collective bargaining is summarised in Table 17. Only a small proportion (4%) of the trade unions in the paper sector are not involved in collective bargaining (given in bold in Table 17). Among the 68 trade unions, 47 (69%) are involved in multi-employer bargaining. Of those, 13 (19%) only participate in multi-employer bargaining, while 34 (50%) are involved in both multi-employer and

single-employer bargaining. The remaining 18 trade unions (26%) are only involved in single-employer bargaining.

Of the 39 employer organisations in the paper sector, 32 (82%) are involved in collective bargaining. Most of them are involved in multi-employer bargaining: 28 (72%) take part in multi-employer bargaining only, and 2 also participate in single-employer bargaining. Another two organisations are only involved in single-employer bargaining.

Table 17: Collective bargaining in the paper sector (number and % of organisations), 2019

	Trade unions				Employer organisations/business associations				
No collective bargaining	3 (4%)				7 (18%)				
Multi-employer bargaining only	13 (19%)	47 (69%)	52 (76%)	65 (96%)	68 (100%)	28 (72%)	30 (77%)	32 (82%)	39 (100%)
Both single- and multi-employer bargaining	34 (50%)					2 (5%)			
Single-employer bargaining only	18 (26%)	4 (10%)	2 (5%)						

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

In Table 18, collective bargaining information is presented on a country-by-country basis, illustrating the different national collective bargaining patterns. Table 19 shows the level of bargaining that is taking place in different countries, taking into account that single-employer bargaining can also take place without the involvement of the employer organisation (which is not considered in Table 18).

Table 18: Type of collective bargaining, by country, 2019

Type of collective bargaining	Countries
Multi-employer bargaining	AT, DK, EL, SE
Single-employer bargaining and multi-employer bargaining	BE, BG, CZ, DE, ES, FI, FR, IT, LV, NL, PT, SI, SK, UK
Single-employer bargaining	HR, HU, IE, LT, LU, MT, PL, RO
No collective bargaining	CY, EE

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 19: Coverage of collective bargaining, 2019

Type of collective bargaining	Collective bargaining coverage						Information not available
	>94%	75–94%	50–74%	25–49%	1–24%	0%	
Multi-employer bargaining	AT	SE	DK				EL

Single-employer bargaining and multi-employer bargaining	BE, FR, IT, NL, SI	ES, FI, PT	DE	SK	BG, CZ		LV, UK
Single-employer bargaining		LU	HR	HU, IE	LT, PL, RO		MT
No collective bargaining						CY, EE	

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

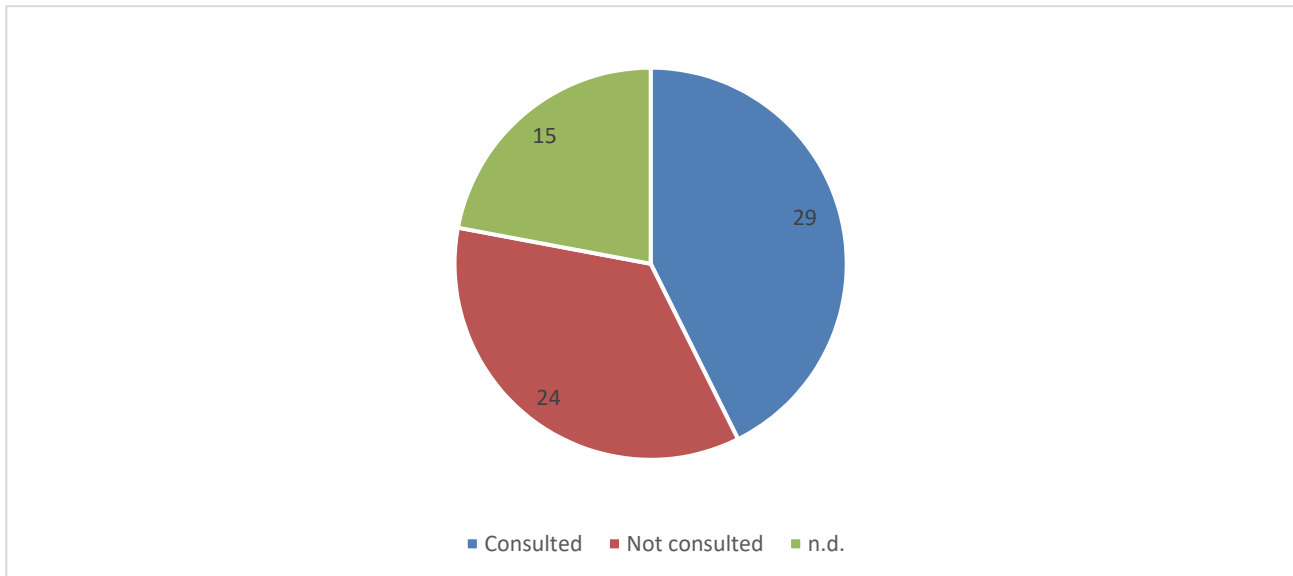
Participation in public policy

Involvement in policymaking is another indicator of the relevance of national social partner organisations in the sector. In a significant number of Member States (particularly in northern and western Europe), social partners' participation in the making of public policy is long established. In a number of other countries (particularly in central and eastern Europe) such involvement has emerged more recently, but in many of these countries it is already rather formalised, for instance in tripartite bodies at the central level.

Trade unions or interest representation

Figure 12 provides an overview of the involvement of trade unions in relevant policymaking at national level. This shows that 29 trade unions (43%) are consulted by the government on issues related to working conditions or employment and 24 (35%) were not. For 15 trade unions (22%), not enough information was available to assess whether or not they were consulted.

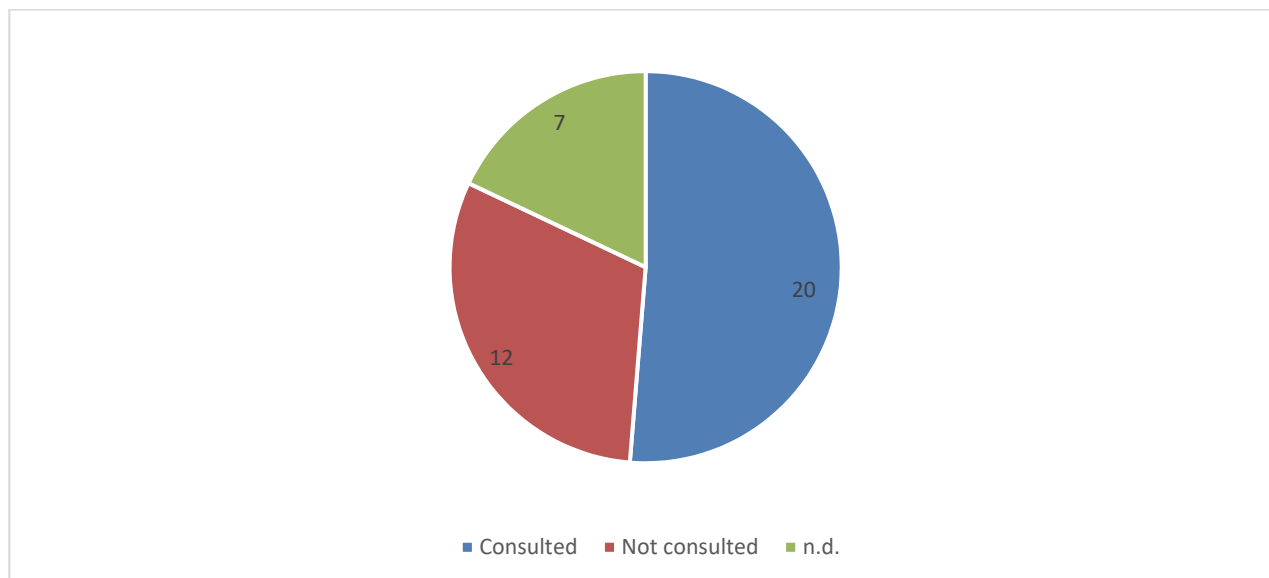
Figure 12: Trade union involvement in consultation (number), 2019



Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Of the 39 employer organisations in the paper sector, 20 (51%) were consulted by the government on issues related to working conditions or employment, while 12 (31%) were not (Figure 13). For seven organisations (18%), not enough information was available to assess whether or not they were consulted.

Figure 13: Employer organisation involvement in consultation (number), 2019



Source: Network of Eurofound Correspondents' national contributions to this study, 2019

The research shows that in 11 countries (CZ, DK, EL, ES, HU, IT, LV, PL, RO, SI and the UK) with trade unions that could potentially be consulted, none of them were consulted, while in another 11 countries (AT, BE, BG, DE, FI, HR, IE, LU, NL, SE and SK) at least one union was consulted. In a number of those countries, all trade unions in the sector report that they are consulted (BE, BG, DE, HR, IE, LU, NL, SE and SK).

On the employers' side, in five of the countries where there are employers' organisations that could potentially be consulted (AU, EL, IT, LV and PL) none of them were consulted by the government. In 16 countries, at least one employer organisation was consulted (BE, BG, CZ, DE, DK, ES, FI, HR, IE, LT, LU, NL, RO, SE, SI and SK). In 11 of those countries, all employer organisations consider that they are consulted (BE, CZ, DK, FI, HR, IE, LT, NL, RO, SE and SK).

Table 20: Consultation of employers and trade unions, by country, 2019

	Trade unions consulted	No trade unions consulted
Employer organisations/business associations consulted	BE, BG, DE, FI, HR, IE, LU, NL, SE, SK	CZ, DK, ES, LT (no information on trade unions), RO, SI
No employer organisations/business associations consulted	AT	CY (no trade unions or employer organisations), EE (no trade unions or employer organisations), EL, HU (no employer organisations), IT, LV, PL, UK (no information on employer organisations)

Note: Data are missing for France, Malta and Portugal.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Tripartite and bipartite participation

The common involvement in tripartite and/or bipartite bodies in which sector-related topics are dealt with or sector-related actors are involved implies some kind of mutual recognition. For EU Member States without established practices of multi-employer bargaining, this involvement can be a way to gain mutual recognition as representative counterparts. Table 21 indicates the trade unions and employer organisations that participate in these structures. In total, 14 countries have sector-related bipartite and/or tripartite bodies. In terms of sector-relatedness, it is not always completely clear whether these are strictly sector related or part of a wider setting.

Table 21: Tripartite and bipartite social dialogue bodies in which sector-related issues are dealt with or in which sector-related social partners are involved, 2019

	Social dialogue body	Bipartite/ tripartite	Scope/field of activity	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
AT	None					
BE	Fonds voor bestaanszekerheid van de voortbrenging van papierpap, papier en karton	Bipartite	Social Fund (managing and paying out social benefits)	Statutory	CNE, ABVV-FGTB, ACLVB-CGSLB	Cobelpa
	Fonds voor bestaanszekerheid voor de papier- en kartonbewerking	Bipartite	Social Fund (managing and paying out social benefits)	Statutory	CNE, ABVV-FGTB, ACLVB-CGSLB	Fetra
BG	Branch council for Tripartite Cooperation in Pulp and Paper, Wood manufacturing and Furniture industry	Tripartite	Labour market, remuneration, social security	Statutory	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry, Federation of Light Industry/ Podkrepa	Branch Chamber of the Bulgarian Pulp and Paper Industry, Branch Chamber of Wood Manufacturing and Furniture Industry
	Branch council for health and safety in Pulp and Paper, Wood manufacturing and Furniture industry	Tripartite	Health and safety at work	Statutory	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry, Federation of Light Industry/ Podkrepa	Branch Chamber of the Bulgarian Pulp and Paper Industry, Branch Chamber of Wood Manufacturing and Furniture Industry
	Branch council for Tripartite Cooperation in the Chemical sector	Tripartite	Industrial relations and management practices, employment, social standards of the workers, occupational qualifications	Statutory	National Labour Federation 'Chemistry and Industry', Federation 'Chemistry'	Bulgarian Chamber of Chemical Industry
	Branch council for health and safety in Chemical sector	Tripartite	Health and safety at work	Statutory	National Labour Federation 'Chemistry and Industry', Federation 'Chemistry'	Bulgarian Chamber of Chemical Industry
CY	None					
CZ	None					
DE	None					
DK	Industriens Fællesudvalg	Bipartite	Committee for vocational education	Statutory	3F	DI

			and training in the manufacturing industry			
	BFA Industri	Bipartite	Trade association in working environment in the manufacturing industry	Statutory	3F, Dansk Metal, HK Privat, Dansk El-Forbund, Fødevareforbundet NNF, Teknisk Landsforbund, CO-industri	DI, Grakom, Mediearbejdsgiver, Dansk Mode og Textil, Lederne
EE	None					
EL	None					
ES	Monitoring commission on the implementation of the national sector collective agreement	Bipartite	Implementation of all terms agreed in the collective agreement	Agreement	All trade unions that have signed the agreement should have representatives	All employer organisations that have signed the agreement should have representatives
FI	None					
FR	Commission Paritaire Nationale Emploi Formation (CPNEF) Intersecteur Papier Carton	Bipartite	Employment and vocational training	Agreement	Filpac-CGT, FG-FO, FCE-CFDT, FIBOPA CFE-CGC	UNIDIS
	Observatoire Prospectif des Métiers et des Qualifications Intersecteur Papier Carton	Bipartite	Employment and vocational training (studies)	Agreement	Filpac-CGT, FG-FO, FCE-CFDT, FIBOPA CFE-CGC	UNIDIS
	CPNE – Transformation Papiers cartons	Bipartite	Employment and vocational training	Agreement	Filpac-CGT, FG-FO, FCE-CFDT, FIBOPA CFE-CGC	UNIDIS
	OPCA 3+	Bipartite	Financing of vocational training	Agreement	Filpac-CGT, FG-FO, FCE-CFDT, FIBOPA CFE-CGC	UNIDIS
HR	None					
HU	None					
IE	Print and Packaging Forum	Tripartite	Paper sector; established through the Programme for Prosperity & Fairness, Social Partnership agreement 2003	Agreement	SIPTU, Connect, Unite	IPF
IT	Osservatorio Nazionale (National Observatory)	Bipartite	Common evaluation and information on market dynamics and occupational forecasts, investments, training needs and technological innovations	Agreement	SLC-CGIL, FISTEL-CISL, UILCOM-UIL, UGL Carta e Stampa	Assocarta, Assografici

	Ente Nazionale Istruzione Professionale Grafica (ENIPG)	Bipartite	Professional and training fund	Agreement	SLC-CGIL, FISTEL-CISL, UILCOM-UIL, UGL Carta e Stampa	Assocarta, Assografici
	Byblos	Bipartite	Supplementary pension fund	Agreement	SLC-CGIL, FISTEL-CISL, UILCOM-UIL, UGL Carta e Stampa	Assocarta, Assografici
	Salute Sempre	Bipartite	Supplementary healthcare fund	Agreement	SLC-CGIL, FISTEL-CISL, UILCOM-UIL, UGL Carta e Stampa	Assocarta, Assografici
	Osservatorio Nazionale Permanente (Permanent National Observatory)	Bipartite	Common evaluation and information on market dynamics and occupational forecasts, investments, training needs and technological innovations	Agreement	SLC-CGIL, FISTEL-CISL, UILCOM-UIL	UNIGEC-Confapi, Confapi, Unimatica Confapi
LT	None					
LU	None					
LV	National tripartite cooperation council	Tripartite	General social dialogue body	Statutory	Free Trade Union Confederation of Latvia	Latvian Employers' Confederation
MT	None					
NL	De Stichting Fonds Collectieve Belangen Kartonage- en Flexibele Verpakkingenbedrijf (FCB), The Foundation for Collective Interests Cardboard and Flexible Packaging Enterprises	Bipartite	The fund helps enterprises to provide training to their employees to increase the quality of their work and working conditions and to make their careers more sustainable	n.d.	FNV Procesindustrie, CNV Vakmensen	Kartoflex
PL	None					
PT	None					
RO	Economic and Social Council (CES)	Tripartite	A forum that must be consulted on all draft laws in its area of competence (economy, taxes, labour, social protection, health, education, research, culture, wages)	Statutory	All representative national trade union confederations	Employer organisations representative at national level
	Committees for Social Dialogue constituted at the level of Ministry of Labour and Social Justice	Tripartite	n.d.	Statutory	All representative national trade union confederations	Employer organisations representative at national level

SE	Sirius (Skogsindustrins råd för industriråd i samverkan)	Bipartite	Work environment/ safety/health, competence and education, leadership and co-working, gender equality and diversity	Agreement	Ledarna, Sveriges Ingenjörer, Pappers, Unionen	Industriarbetsgivarna
	Centralfonden (The Central fund)	Tripartite (the chair is appointed by the Swedish government)	The fund's mission is to create necessary conditions for sustainable working lives for employees in the sector; the areas of focus are work environment and health and safety	Agreement	Ledarna, Sveriges Ingenjörer, Pappers, Unionen, GS-facket	Industriarbetsgivarna
	Grafiska Miljörådet, Environment Council for Graphic (GMR)	Bipartite	Work environment/ health and safety in the graphical industry	Agreement	Ledarna, Sveriges Ingenjörer, Pappers, Unionen, GS-facket	Grafiska Företagen
SI	Negotiating Group for the sectoral collective agreement	Bipartite	Collective agreements, health and safety, equal opportunities, labour market, social security	Agreement	Trade Union of Paper Industry – Trade Union Confederation PERGAM	Chamber of Commerce and Industry of Slovenia – Association for Paper and Paper Converting Industry, Association of Employers of Slovenia – Wood and Paper Industry Section
SK	Economic and Social Council (HSR)	Tripartite	All relevant issues concerning employment, wages, working conditions and economic and social policy in the sector	Statutory	OZ DLV via membership of the Confederation of Trade Unions (KOZ SR)	ZCPP-SR via membership of the Federation of Employer Associations – AZZZ SR
UK	PIABAC	Tripartite	Health and safety	Agreement	GMB, Unite the Union	CPI
	SEMTA sector skills body for manufacturing	Bipartite	Skills	Statutory	Unite the Union	CPI

Note: *n.d.* = no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Fragmentation and pluralism in the paper sector

This section provides an overview of the reasons for organisational fragmentation and pluralism in the sector. Fragmentation occurs when different organisations cover different segments of a sector. This makes those organisations complementary, as their membership domains are not overlapping. Pluralism, on the other hand, is when organisations coexist in the same (or very similar) domain, representing the same types of employees.

In the paper sector, there is an average of 2.4 trade unions per Member State. The reasons for fragmentation and pluralism of trade unions in the different countries are shown in Table 22. In nine countries, a reason for there being more than one trade union in the sector is that they organise different categories of workers (for example, blue-collar and white-collar workers). Another related, and fairly common, reason was that different trade unions have members in separate parts of the sector (for example, one union for workers in pulp production and another for workers in production of cardboard articles). A less common reason – the case in just three countries – is that different unions cover separate parts of the country. Lastly, in seven countries, there was more than one trade union in the sector because different unions represent different ideologies.

Croatia, Denmark, Greece, Hungary, Lithuania, Luxembourg, Malta, Romania, Slovakia and Slovenia each have only one trade union active in the sector and, thus, fragmentation and pluralism are not relevant.

Table 22: Reasons for fragmentation and pluralism of trade unions in the paper sector, 2019

	They organise different categories of workers	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector/types of activity	They have similar membership domains but differ in terms of ideology	Other reason
AT	X			X		
BE	X	X			X	
BG				X	X	
CY	No trade unions in the sector					
CZ	X	X		X		
DE				X		
DK	Only one trade union in the sector					
EE	No trade unions in the sector					
EL	Only one trade union in the sector					
ES				X		
FI	X					
FR	X				X	
HR	Only one trade union in the sector					
HU	Only one trade union in the sector					
IE	X					
IT					X	
LT	Only one trade union in the sector					
LU	Only one trade union in the sector					
LV						X*
MT	Only one trade union in the sector					
NL					X	
PL					X	
PT	X	X			X	
RO	Only one trade union in the sector					
SE	X			X		

SI	Only one trade union in the sector					
SK	Only one trade union in the sector					
UK	X			X		

Notes: * *Forest Sphere Workers Trade Union has represented the sector historically. But with the sector changing and merging with printing activities, a printing sector trade union has now become relevant.*

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Fragmentation is less common among employer organisations in the paper sector. Currently, there is an average of 1.4 employer organisations per Member State in the sector.

Table 23 shows that the main reason for the fragmentation of interest representation on the employers' side is that the organisations have members in different parts of the sector or in different types of activity. This is the case in nine Member States. In fact, with the exception of the Netherlands, this is mentioned as a reason for fragmentation by all countries where fragmentation exists. Much less common is fragmentation due to regional coverage, differences in size and ownership of the member companies, or differences in ideology.

Bulgaria, Croatia, Czechia, Denmark, Finland, Greece, Ireland, Latvia, Lithuania, Poland, Romania, Slovakia and the UK only have one employer organisation for the whole of the paper sector, and thus no fragmentation or pluralism.

Table 23: Reasons for fragmentation and pluralism of employer organisations in the paper sector, 2019

	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector/types of activity	They have similar membership domains but differ in terms of ideology	Other reason
AT			X		
BE			X		
BG	Only one employer organisation in the sector				
CY	No employer organisations in the sector				
CZ	Only one employer organisation in the sector				
DE			X		
DK	Only one employer organisation in the sector				
EE	No employer organisations in the sector				
EL	Only one employer organisation in the sector				
ES	X		X		
FI	Only one employer organisation in the sector				
FR			X		
HR	Only one employer organisation in the sector				
HU	No employer organisation in the sector				
IE	Only one employer organisation in the sector				
IT		X	X		
LT	Only one employer organisation in the sector				
LU	No employer organisations in the sector				

LV	Only one employer organisation in the sector			
MT	No employer organisations in the sector			
NL			X	
PL	Only one employer organisation in the sector			
PT		X		
RO	Only one employer organisation in the sector			
SE		X		
SI		X		
SK	Only one employer organisation in the sector			
UK	Only one employer organisation in the sector			

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

3. European level of interest representation

This chapter presents detailed data on the representativeness of the two European-level social partners in the paper sector: IndustriAll Europe on the employees' side and CEPI on the employers' side. Each is listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU. Where supplementary information has become available in the course of the study for other organisations (potentially) involved in social dialogue in the sector, this is also presented.

The representativeness of the social partners is assessed in three ways. First, the membership strength of both IndustriAll Europe and CEPI is described, based on the collective coverage of their national affiliates. Second, the European social partners' capacity to negotiate 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. This capacity to negotiate is impacted by the involvement of their affiliates in collective bargaining at national level, which ensures not only that 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, the limits of the representativeness of social partners involved in the ESSDC for the paper sector are assessed through comparison with the representativeness of other European associations and the national organisations not represented by IndustriAll Europe and CEPI.

Membership domain of IndustriAll Europe

IndustriAll Europe is affiliated to the European Trade Union Confederation (ETUC) at cross-sectoral level. Through its national affiliates, IndustriAll Europe covers both NACE codes for the paper sector (17.1 and 17.2). It covers most manufacturing industries, and its membership domain as a whole is multisectoral. Its membership therefore overlaps with the paper sector under consideration in this report.

In the statutes of IndustriAll Europe, membership and affiliation are defined in Articles 7 and 8. Member trade unions are required to be democratic and independent, and they must be affiliated to a national cross-sectoral trade union confederation that is affiliated to ETUC. The Executive Committee takes membership-related decisions and can decide, with a two-thirds majority, to make an exception to the requirement for affiliation to a cross-sectoral confederation that is a member of ETUC. The statutes of IndustriAll Europe only provide for full membership.

Of the 68 national paper sector trade unions, 37 (54%) are affiliated to IndustriAll Europe. Of the 26 countries where a sector-related trade union was identified, IndustriAll Europe has an affiliate in 19 (73%). As can be seen in Table 24, in 15 of the countries where IndustriAll Europe has at least 1 affiliate, that member is also the most important in the sector in terms of membership. In 9 countries (AT, BE, DK, ES, HU, MT, NL, SI and the UK), all unions representing workers in the sector are affiliated to IndustriAll Europe.

In eight Member States (EL, HR, IT, LT, LU, LV, RO and SK) the only trade unions with members in the paper sector are not affiliated to IndustriAll Europe. In Cyprus and Estonia, there are no active trade unions in the sector.

However, for 16 trade unions in 11 countries that are affiliated to IndustriAll Europe, this affiliation was not taken into consideration, as IndustriAll Europe reported that these unions did not participate directly in its

paper sector activities.⁶ These trade unions are affiliated to IndustriAll Europe because of their members in other sectors and their involvement in IndustriAll Europe's other sectoral activities. As some national trade unions have membership domains that overlap with other sectors, they may choose to affiliate their membership in one sector to one European organisation and their membership in another sector to another European organisation. Subsequently, a national trade union can be a member of different European organisations, but only one for its membership in the paper sector specifically. This is the case for these national trade unions, as captured in the bottom-up collection of data in this study. Taking the top-down approach into account as well, from the point of view of IndustriAll Europe, its affiliated trade unions do not typically participate in relation to specific sectors. All trade unions represented in the paper sector that are affiliated to IndustriAll Europe may participate in its paper sector activities.

Table 24: Affiliation of sector-related trade unions to IndustriAll Europe, 2019

	Trade unions affiliated to IndustriAll Europe and involved in its paper sector activities	Trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe	Is the trade union with most members in the sector affiliated?
AT	GPA-djp, PRO-GE	GPA-djp, PRO-GE		Yes
BE	ABVV-FGTB, ACV-BIE, CNE	ABVV-FGTB, ACV-BIE, CNE, ACLVB-CGSLB, BBTK-SETCa		Yes
BG		Federation of Light Industry/Podkrepa, National Labour Federation 'Chemistry and Industry', Chemical Workers' Federation Podkrepa	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry	No
CY	No trade unions in the sector			
CZ		OS ECHO ^a	OS DLV ČR, Č-MOS, SNO	No
DE	IGBCE	IGBCE	ver.di	n.d.
DK	3F	3F, IDA ^b		Yes
EE	No trade unions in the sector			
EL			Federation of Press and Paper Industry Employees of Greece	No
ES	FSC-CCOO, FICA-UGT	FSC-CCOO, FICA-UGT		Yes
FI	Paperiliitto, Pro, IL	Paperiliitto, Pro, IL, TEK	YTN, Sähköliitto, Suomen konepäällystöliitto	Yes
FR	Filpac-CGT, FCE-CFDT	Filpac-CGT, FCE-CFDT	FG-FO, FIBOPA CFE-CGC	Yes
HR		EKN ^c	SSH	No
HU		VDSZ (PDSZ, the paper sector trade union, is part of VDSZ)		Yes
IE		SIPTU	Connect, Unite	Yes

⁶ These 16 trade unions are: BBTK-SETCa in Belgium, all three trade unions in Bulgaria, TEK and Sähköliitto in Finland, SIPTU and Connect in Ireland, LMPF in Lithuania, OGB-L in Luxembourg, CNV Vakmensen in the Netherlands, SINDEQ in Portugal, FIEQUIMETAL in Spain, Sveriges Ingenjörer in Sweden, and GMB and USDAW in the UK.

IT		FIST CISL ^d	SLC-CGIL, UILCOM-UIL, UGL Carta e Stampa	No
LT			LMPF	No
LU			OGB-L	No
LV			LPNA, LMNA	No
MT		GWU		Yes
NL	FNV Procesindustrie	FNV Procesindustrie, CNV Vakmensen		Yes
PL	KSPCh NSZZ 'Solidarnosc'	KSPCh NSZZ 'Solidarnosc'	MZZP IP Sp. z o.o. w Kwidzynie	Yes
PT	SIMA	SIMA, FIEQUIMETAL ^e	SINDETELCO, SITEMAQ, SIFOMATE, SITESE, SINDEQ	Yes
RO			FMLCH	No
SE	Pappers, Unionen	Pappers, Unionen, Sveriges Ingenjörer	Ledarna, GS-facket	Yes
SI	SPDS-KSS PERGAM	SPDS-KSS PERGAM		Yes
SK			OZ DLV	No
UK	Unite the Union	Unite the Union, GMB, USDAW		Yes

Notes: *n.d.* = no data. ^a OS Echo has about 60 trade union members in one single paper company (Lenzing Biocel Paskov a.s.). ^b IDA does not have any trade union members in the paper sector in Denmark and is therefore not relevant to assessing the representativeness of IndustriAll Europe in the paper sector. ^c EKN does not have any trade union members in the paper sector in Croatia. ^d FIST CISL does not have any trade union members in the paper sector in Italy. FIST is the CISL federation that represents workers in the service sector. It is a second-level organisation that coordinates the activities of the federations Fisascat-CISL (the federation historically representing service sector workers) and Felsa-CISL (the federation representing atypical workers). FIST is not connected to FISTEL, which is the CISL federation in charge of communication and entertainment workers. FIST is affiliated to several global federations: UNI Global Union, EFFAT, UITA, ITF and, since 1 January 2018, IndustriAll Europe. From declarations of the Secretary General of the organisation, we know that FIST is affiliated to IndustriAll Europe for the automotive and ICT sectors (they argue this is because commercial aspects are now key in these sectors) (Aqumt, 2018; Conquiste del Lavoro, 2018). Hence, there is no connection between FIST-CISL and the paper sector. ^e FIQUEMETAL has trade union members in the paper sector in Portugal.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Of IndustriAll Europe's 37 affiliates in the sector, 5 only cover NACE code 17.1, and 2 only cover NACE code 17.2. The other 30 cover both parts of the sector. For the majority of IndustriAll Europe members (18 organisations), the domain pattern is one of sectional overlap, covering workers in part of the paper sector (some because they only cover one NACE code; others because they only cover certain regions or just white- or blue-collar workers) as well as other sectors. A further 15 organisations have an overlapping domain. Two organisations affiliated to IndustriAll Europe have a sectional domain. Only two IndustriAll Europe affiliates (VDSZ in Hungary and SPDS-KSS PERGAM in Slovenia) have congruent domains (see Table 9, where the affiliates of IndustriAll Europe are shown in bold).

Taking together the countries where IndustriAll Europe has a member organisation involved in its paper sector activities, 77% of the sectoral workforce is covered. Other than in Germany, the IndustriAll Europe paper sector affiliate covers the entire sector (NACE codes 17.1 and 17.2). The affiliate in Germany only covers NACE code 17.1, and this corresponds to 28% of the country's sectoral workforce (Table 38). With this taken into consideration, the share of the workforce represented in IndustriAll Europe's paper sector activities is 61%. Italy, with the second-largest paper sector workforce, corresponding to 11% of the EU sectoral workforce (Table 3), does not have a paper sector trade union affiliated to IndustriAll Europe

(Table 32). FIST CISL is affiliated to IndustriAll Europe for its members in the ICT and automotive sectors; however, it does not have any members in the paper sector and so is not relevant within the scope of this study (see note d, Table 24).

Of the 68 trade unions in the sector, 65 are involved in collective bargaining, and 35 of those are members of IndustriAll Europe. All IndustriAll Europe members in the sector apart from two (the Finnish organisations IL and TEK) are involved in collective bargaining.

Furthermore, IndustriAll Europe has at least one affiliate in four of the five⁷ countries with the largest numbers of persons employed in the paper sector (DE, FR, PL, UK). It also has at least one affiliate in the five countries with the largest paper sector employment as a share of total employment (AT, FI, PL, SE and SI).

Membership domain of CEPI

CEPI was established in 1992, and it currently has affiliates in 16 European countries (Table 25). Of the 37 employer organisations in the paper sector, 17 (46%) are members of CEPI. In seven countries (CZ, FI, NL, PL, RO, SK and the UK), all employer organisations in the sector are members of CEPI. In another seven (BG, DK, EL, HR, IE, LT and LV), at least one employer organisation exists, but none are members of CEPI.

In 13 countries, the employer organisation with the most members in the sector (based on the data available) is a member of CEPI. Of the 16 countries with a CEPI affiliate, only Austria, Germany and Italy have a non-affiliated organisation that is, or might be, larger. In Austria, the largest employer organisation is PROPAK, which only covers activities in NACE code 17.2. In Germany, the largest employer organisations are HPV and VAP (these are roughly the same size), though it is difficult to compare these to the CEPI-affiliated organisation VDP, as it is a business association and not involved in collective bargaining. In Italy, Assografici, a non-affiliated organisation, is the largest employer organisation in the sector.

In 15 countries, the largest employer in the sector is a member of the CEPI affiliate.

Table 25: Sector-related employer organisations affiliated to CEPI, 2019

	Employer organisations affiliated to CEPI	Employer organisations not affiliated to CEPI	Is the employer organisation with most members in the sector affiliated?	Is the largest employer in the sector a member of an affiliated employer organisation?
AT	Austropapier	FVPI, PROPAK	No	Yes
BE	Cobelpa	Fetra	Yes	Yes
BG	None	Branch Chamber of the Bulgarian Pulp and Paper Industry	No	No
CY	No employer organisations in the sector			
CZ	ACPP	None	Yes	Yes
DE	VDP	HPV, VAP	No	n.d.
DK	None	DI	No	No
EE	No employer organisations in the sector			
EL	None	SEV	No	No
ES	ASPAPEL	FEIGRAF, AFCO	Yes	Yes

⁷ For Italy, the country with the second largest paper sector workforce, there is no IndustriAll Europe member.

FI	Metsäteollisuus	None	Yes	Yes
FR	COPACEL ^a	CAP/FFCP	Yes	Yes
HR	None	HUP UDPI	No	No
HU	No employer organisations in the sector			
IE	None	IPF	No	No
IT	Assocarta	Assografici, UNIGEC-Confapi	No	Yes
LT	None	LM	No	No
LU	No employer organisations in the sector			
LV	None	LPUA	No	No
MT	No employer organisations in the sector			
NL	VNP, Kartoflex	None	Yes	Yes
PL	SPP	None	Yes	Yes
PT	CELPA	ANIPC, APIGRAF	Yes	Yes
RO	PICH-ROMPAP	None	Yes	Yes
SE	Industriarbetsgivarna ^b	Grafiska Företagen	Yes	Yes
SI	GZS-ZPPPI	ZDS-Sekcija za les in papir	Yes	Yes
SK	ZCPP-SR	None	Yes	Yes
UK	CPI	None	Yes	Yes

Notes: ^a UNIDIS (included in Tables 13, 14 and 16), the paper sector employer organisation from France, is part of the umbrella organisation COPACEL. UNIDIS is involved in collective bargaining in the paper sector in France as was indicated in Table 16. It is, however, the umbrella organisation COPACEL that is a member of CEPI.

^bIndustriarbetsgivarna's membership is via its affiliate Skogsindustrierna. n.d. = no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Of CEPI's 16 affiliates in the paper sector, 13 cover both parts of the sector. The other three CEPI member organisations – one in Austria, one in Belgium and one in Italy – cover NACE code 17.1 only. Thus, CEPI members in these three countries only cover NACE code 17.1. CEPI itself only represents its members for their activities in NACE code 17.1.

The two most prevalent membership domain patterns among the affiliates are congruence (seven organisations) and overlap (eight organisations). Three CEPI affiliates have a sectional domain, and none have a sectionally overlapping domain.

Of the 37 employer organisations in the sector, 32 are involved in collective bargaining and, of those, 13 are members of CEPI. Thus, the majority (81%) of CEPI's 16 members in the paper sector are involved in collective bargaining. The CEPI affiliates make up 41% of all the organisations in the sector that are involved in collective bargaining.

The 16 countries with a paper sector employer organisation affiliated to CEPI employ 92% of the sectoral workforce. All CEPI member organisations – apart from those in Austria, Belgium and Italy – cover the entire paper sector (NACE codes 17.1 and 17.2). As shown in Table 38 in Annex 1, the sectoral workforce in NACE code 17.1 is 42% in Austria, 26% in Belgium and 17% in Italy. As the CEPI affiliates in Austria, Belgium and Italy only cover NACE code 17.1, the proportion of the sectoral workforce has to be adjusted to 80%. As mentioned above, CEPI itself focuses on representing the interests of companies in NACE code 17.1. On that basis, CEPI represents, within its membership structures, 95% of paper production in Europe and 22% of global production.

Representativeness of IndustriAll Europe and CEPI

Table 26 summarises the representativeness of IndustriAll Europe and CEPI in the paper sector, showing their respective affiliated trade unions and employer organisations.

There are 68 trade unions in the paper sector. At least one union is present in 26 countries, the exceptions being Cyprus and Estonia. Of the 68 trade unions, 37 (54%) are members of IndustriAll Europe; and out of the 65 unions that are involved in collective bargaining, 35 (54%) are members of IndustriAll Europe. IndustriAll Europe has sector-related members in 19 countries. With only two exceptions, all of its affiliates in the sector are involved in collective bargaining.

There are 37 employer organisations in the paper sector, across 21 countries. CEPI has sector-related members in 16 countries (16 employer organisations, or 43% of employer organisations in the sector), and the majority of its members are involved in collective bargaining. Of those involved in collective bargaining, 41% are CEPI affiliates.

Table 26: Membership structure of IndustriAll Europe and CEPI, 2019

	Organisations	Countries with organisations	Organisations involved in collective bargaining	Countries with organisation(s) involved in collective bargaining
Sector-related trade unions (number)	68	26 No trade unions in CY, EE	65	26
Affiliates of IndustriAll Europe (number)	37	19 None in EL, HR, IT, LT, LU, LV, RO, SK	35	19
Share that is affiliated (%)	54%	69%	54%	69%
Sector-related business associations (not involved in collective bargaining and not affiliated to a European social partner organisation) (number)	2	EL, LT		
Sector-related employer organisations (number)	37	21 No employer organisations in CY, EE, HU, LU, MT	32	20 None in EL, LT, PL
Affiliates of CEPI (number)	16	16 None in BG, DK, EL, HR, IE, LT, LV	13	13 None in AT, DE, PL
Share that is affiliated (%)	43%	75%	41%	63%

Source: Calculated on the basis of information provided by the Network of Eurofound Correspondents, 2019

Table 27 provides details on a country-by-country basis, demonstrating the importance of IndustriAll Europe and CEPI members in terms of their coverage of employees in the sector and their involvement in collective bargaining.

In 16 countries, the most representative trade union is a member of IndustriAll Europe; and in 13 countries, the most representative employer organisation is a member of CEPI.

Table 27: Importance of IndustriAll Europe and CEPI members at national level, 2019

	Most representative trade union	Sector coverage (NACE)	Involved in collective bargaining	Member of IndustriAll Europe	Most representative employer organisation	Sector coverage (NACE)	Involved in collective bargaining	Member of CEPI
AT	GPA-djp	Full	Yes	Yes	PROPAK	17.2	Yes	No
BE	CNE	Full	Yes	Yes	Indufed*	Full	Yes	Yes
BG	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry	Full	Yes	No	Branch Chamber of the Bulgarian Pulp and Paper Industry	Full	Yes	No
CY	No trade unions in the sector				No employer organisations in the sector			
CZ	OS DLV ČR	Full	Yes	No	ACPP	Full	Yes	Yes
DE	IGBCE	17.1	Yes	Yes	HPV	17.2	Yes	No
DK	3F	Full	Yes	Yes	DI	Full	Yes	No
EE	No trade unions in the sector				No employer organisations in the sector			
EL	Federation of Press and Paper Industry Employees of Greece	Full	Yes	No	SEV	Full	No	No
ES	FSC-CCOO	Full	Yes	Yes	ASPAPEL	Full	Yes	Yes
FI	Paperiliitto	Full	Yes	Yes	Metsäteollisuus	Full	Yes	Yes
FR	Filpac-CGT	Full	Yes	Yes	UNIDIS	Full	Yes	Yes
HR	SSH	Full	Yes	No	HUP UDPI	Full	Yes	No
HU	VDSZ	Full	Yes	Yes	No employer organisations in the sector			
IE	SIPTU	Full	Yes	Yes	IPF	Full	Yes	No
IT	SLC-CGIL	Full	Yes	No	Assografici	17.2	Yes	No
LT	LMPF	Full	Yes	No	LM	Full	No	No
LU	OGB-L	Full	Yes	No	No employer organisations in the sector			
LV	LMNA	Full	Yes	No	LPUA	17.2	Yes	No
MT	GWU	17.2	Yes	Yes	No employer organisations in the sector			
NL	FNV Procesindustrie	Full	Yes	Yes	Kartoflex	Full	Yes	Yes
PL	KSPCh NSZZ 'Solidarnosc'	Full	Yes	Yes	SPP	Full	No	Yes
PT	FIEQUIMETAL	Full	Yes	Yes	CELPA	Full	Yes	Yes
RO	FMLCH	Full	Yes	No	PICH-ROMPAP	Full	Yes	Yes
SE	Pappers	Full	Yes	Yes	Industriarbetsgivarna	Full	Yes	Yes
SI	SPDS-KSS PERGAM	Full	Yes	Yes	GZS-ZPPPI	Full	Yes	Yes
SK	OZ DLV	Full	Yes	No	ZCPP-SR	Full	Yes	Yes
UK	Unite the Union	Full	Yes	Yes	CPI	Full	Yes	Yes

Note: * *Indufed* is not a separate employer organisation, but an umbrella organisation formed from the merger of *Cobelpa*, *Fetra* and a federation of the glass industry (see note for Table 13).

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Other European trade union associations

In 17 countries, there are sector-related trade unions (some are involved in collective bargaining) that are not affiliated to IndustriAll Europe; in some of these cases, the unions are members of other European sectoral and cross-sectoral associations.

An overview of the membership of national trade unions is provided in Table 28. Most have no, or relatively few, affiliation(s) to European associations other than IndustriAll Europe. Ten trade unions, in ten different countries, indicate membership of UNI Europa. Some of these specified that their membership relates to UNI Graphical & Packaging. The only other organisation mentioned, the European Federation of Building and Woodworkers (EFBWW), is more peripheral to the paper sector. This organisation was mentioned by only one trade union. Although the affiliations given in Table 28 are likely not exhaustive, this overview emphasises IndustriAll Europe's status as the sector's principal labour representative at European level.

In an earlier version of this report, Table 28 only considered affiliations related to the paper sector (see green and red shading). In the feedback process, UNI Europa requested that the right-hand column be added, as in their understanding the packaging, paper converting and graphical sector should also be considered in the assessment of their representativeness in the paper sector. Some of the trade unions included in this column are not included in Table 8, which lists all national paper sector trade unions.

Table 28: Paper sector trade unions affiliated to IndustriAll Europe and other European associations, 2019

	Trade unions affiliated to IndustriAll Europe, involved in their paper sector activities	Paper sector trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe for the paper sector	Organised in which other European sectoral or cross-sectoral trade union organisation for paper sector	Comments by UNI Europa regarding packaging and paper converting activities
AT	GPA-djp, PRO-GE	GPA-djp, PRO-GE	None	None	GPA-djp is also affiliated to UNI Europa
BE	ABVV-FGTB, ACV-BIE, CNE	ABVV-FGTB, ACV-BIE, CNE, ACLVB-CGSLB, BBTK-SETCa	None	ABVV-FGTB is affiliated to UNI Europa	ACV-BIE, CNE, ACLVB-CGSLB, ACV PULS and BBTK-SETCa are also affiliated to UNI Graphical & Packaging
BG		Federation of Light Industry/Podkrepa, National Labour Federation 'Chemistry and Industry', Federation 'Chemistry'	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry is affiliated to the EFBWW	
CY	No trade unions in the sector				OVIEK SEK ^a is affiliated to UNI Graphical & Packaging
CZ		OS ECHO	OS DLV ČR, Č-MOS, SNO	None	
DE	IGBCE	IGBCE	ver.di	ver.di is a member of UNI Europa	ver.di is affiliated to UNI and represents the biggest part of

Representativeness of the European social partner organisations: Paper sector

	Trade unions affiliated to IndustriAll Europe, involved in their paper sector activities	Paper sector trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe for the paper sector	Organised in which other European sectoral or cross-sectoral trade union organisation for paper sector	Comments by UNI Europa regarding packaging and paper converting activities
					the packaging sector in Germany
DK	3F	3F	None	None	3F, HK Privat, DM and IDA ^b are affiliated to UNI Graphical & Packaging
EE	No trade unions in the sector				
EL		None	Federation of Press and Paper Industry Employees of Greece	None	
ES	FSC-CCOO, FICA-UGT	FSC-CCOO, FICA-UGT	None	FSC-CCOO and FICA-UGT are affiliated to UNI Graphical & Packaging	ELA STV is affiliated to UNI Graphical & Packaging
FI	Paperiliitto, Pro, IL	Paperiliitto, Pro, IL, TEK	YTN, Sähköliitto, Suomen konepäällystiöliitto	None	Profi is also affiliated to UNI Graphical & Packaging
FR	Filpac-CGT, FCE-CFDT	Filpac-CGT, FCE-CFDT	FG-FO, FIBOPA CFE-CGC	Filpac-CGT is affiliated to UNI Europa	
HR		None	SSH	None	Sindikata Grafikara is affiliated to UNI Graphical & Packaging
HU		VDSZ (PDSZ, the paper sector trade union, is part of VDSZ)	None	None	HGWU is affiliated to UNI Graphical & Packaging
IE		SIPTU	Connect, Unite	SIPTU is affiliated to UNI Europa	
IT		None	SLC-CGIL, UILCOM-UIL, UGL Carta e Stampa	SLC-CGIL, FISTEL-CISL, UILCOM-UIL are all affiliated to UNI Europa	FISTEL-CISL and SLC-CGIL are affiliated to UNI Graphical & Packaging
LT		None	LMPPF	None	LTUCCE is affiliated to UNI Graphical & Packaging
LU		None	OGB-L	None	OGB-L is affiliated to UNI Graphical & Packaging
LV		None	LPNA, LMNA	LPNA reported affiliation to UNI Global Graphical, though UNI Europa did not recognise this	LKDAF is affiliated to UNI Graphical & Packaging
MT		GWU	None	None	

	Trade unions affiliated to IndustriAll Europe, involved in their paper sector activities	Paper sector trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe for the paper sector	Organised in which other European sectoral or cross-sectoral trade union organisation for paper sector	Comments by UNI Europa regarding packaging and paper converting activities
NL	FNV Procesindustrie	FNV Procesindustrie, CNV Vakmensen	None	None	CNV Vakmensen and FNV Media & Cultuur are affiliated to UNI Graphical & Packaging
PL	KSPCh NSZZ 'Solidarnosc'	KSPCh NSZZ 'Solidarnosc'	MZZP IP Sp. z o.o. w Kwidzynie	None	KRZZP is affiliated to UNI Graphical & Packaging
PT	SIMA	SIMA, FIEQUIMETAL	SINDETELCO, SITEMAQ, SIFOMATE, SITESE, SINDEQ	SINDETELCO is affiliated to UNI Europa	
RO		None	FMLCH	None	
SE	Pappers, Unionen	Pappers, Unionen, Sveriges Ingenjörer	Ledarna, GS-facket	GS-facket is affiliated to UNI Graphical & Packaging	Unionen is also affiliated to UNI Graphical & Packaging
SI	SPDS-KSS PERGAM	SPDS-KSS PERGAM	None	SPDS-KSS PERGAM is affiliated to UNI Global, UNI Europa and UNI Graphical & Packaging	
SK		None	OZ DLV	None	
UK	Unite the Union	Unite the Union, GMB, USDAW	None	None	Unite the Union is also affiliated to UNI Graphical & Packaging

Notes: The right-hand column contains comments provided by UNI Europa in the final stage of this study. These were not checked or validated, as this was not within the scope of this study. Further research would be needed to verify the comments. As they relate to the packaging, paper converting and graphical sector, they are strictly speaking not within the scope of this study (see Table 1 and the section on sector-relatedness in the Introduction).^a OVIEK SEK is not included in this study, as it does not have any trade union members in the paper sector. ^b IndustriAll Europe indicated that IDA is also a member organisation of IndustriAll Europe. However, it does not have members in the paper sector (see footnote in Table 24). Subsequently it is not relevant in this assessment of the representativeness of IndustriAll Europe in the paper sector.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

In Table 29, the sector-relatedness of the other two organisations with affiliates in the sector is assessed.

Table 29: Other EU associations with paper sector national trade unions as members, 2019

Other EU trade union organisations			Countries with an affiliate according to organisation websites	Countries with a paper sector affiliate	Countries with an affiliate in paper or graphical industries
Abbreviation	Full name	Assessment of sector-relatedness			
EFBWW	European Federation of Building and Woodworkers	Its members mainly organise workers in the construction, woodworking and furniture industries. This likely reflects the fact that organisations in the paper sector often overlap with woodworking.	All	1 (BE)	
UNI Graphical & Packaging	UNI Graphical & Packaging	Its members organise workers in a diverse range of sectors including newspapers and general printing, security printing (banknotes, credit cards, passports, smart cards, etc.), digital printing, publishing, graphic design and multimedia, cardboard, plastics and flexible packaging. This means there is overlap with the paper sector, particularly with NACE code 17.2 (manufacture of articles of paper and paperboard).	All	10 (BE, DE, ES, FR, IE, IT, LV, PT, SE, SI)	21 (AT, BE, CY, DE, DK, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PL, PT, SE, SI, UK)

This study found 10 paper sector trade unions affiliated to UNI Europa⁸ and only one affiliated to the EFBWW. Even though the websites of the EFBWW and UNI Europa indicate that they have member organisations in all 27 Member States and the UK, as indicated in Table 29, this does not mean that they have affiliated paper sector trade unions⁹ or that the trade unions in question are affiliated to them for their paper sector members. Indeed, as Figure 8 indicates, almost all trade unions have members in sectors other than the paper sector. Thus, the information on the organisations' websites confirming membership in all 27 Member States and the UK may relate to trade unions organising other sectors.

Table 29 shows that UNI Europa has affiliated paper sector trade unions in Belgium, France, Germany, Ireland, Italy, Latvia, Portugal, Slovenia, Spain and Sweden. Among those countries, only Italy and Latvia do not have paper sector unions affiliated to IndustriAll Europe. In Germany, Portugal and Sweden, IndustriAll Europe's affiliates include paper sector trade unions not affiliated to UNI Europa; in Belgium, France, Slovenia and Spain, the same paper sector trade unions are members of both IndustriAll Europe and UNI Europa. This makes UNI Europa the only representative for the paper sector in countries where IndustriAll Europe has no paper sector affiliate – that is, for the Italian paper sector trade unions (SLC-CGIL, FISTEL-CISL, UILCOM-UIL) and LPNA in Latvia.

⁸ ver.di is a member of UNI Europa. Its delegates participate in the ESSDC for graphical industries.

⁹ At the request of UNI Europa, an additional column was added in Table 29, on the right, indicating their membership strength in the activities related to paper converting, packaging and graphical industries.

Other European employer organisations and EU business associations

In 16 Member States, there are employer organisations (some of which are involved in collective bargaining) that are not affiliated to CEPI, but which are in some cases members of other European sectoral and cross-sectoral employer organisations (Table 30).

In 13 countries, none of the employer organisations are members of any other European employer organisations. But in nine countries, there are other affiliations. For instance, four organisations (in Italy, Latvia, Portugal and Sweden) are members of Intergraf. Three others (in Portugal, Romania and Spain) are members of FEFCO. All organisations are summarised in Table 31.

Table 30: Sector-related national employer organisations/business associations affiliated to CEPI and other European associations, 2019

	Employer organisations affiliated to CEPI	Employer organisations not affiliated to CEPI	Organised in which other European sectoral or cross-sectoral employer organisation
AT	Austropapier	FVPI, PROPAK	None
BE	Cobelpa	Fetra	None
BG	None	Branch Chamber of the Bulgarian Pulp and Paper Industry	None
CY	No employer organisations in the sector		
CZ	ACPP	None	None
DE	VDP	HPV, VAP	HPV is affiliated to CITPA
DK	None	DI	None
EE	No employer organisations in the sector		
EL	None	SEV	None
ES	ASPAPEL	FEIGRAF, AFCO	AFCO is affiliated to FEFCO
FI	Metsäteollisuus	None	None
FR	COPACEL/ UNIDIS *	CAP/FFCP	None
HR	None	HUP UDPI	None
HU	No employer organisations in the sector		
IE	None	IPF	n.d.
IT	Assocarta	Assografici, UNIGEC-Confapi	Assografici is affiliated to Intergraf
LT	None	LM	LM is affiliated to the European Confederation of Wood Industry (CEI-Bois) and the European Furniture Manufacturers Confederation (UEA)
LU	No employer organisations in the sector		
LV	None	LPUA	LPUA is affiliated to Intergraf
MT	No employer organisations in the sector		
NL	VNP, Kartoflex	None	Kartoflex is affiliated to FPE and ECMA
PL	SPP	None	None
PT	CELPA	ANIPC, APIGRAF	ANIPC is affiliated to FEFCO; APIGRAF is affiliated to Intergraf, CITPA and FESPA
RO	PICH-ROMPAP	None	PICH-ROMPAP is affiliated to FEFCO

SE	Industriarbetsgivarna	Grafiska Företagen	Grafiska Företagen is affiliated to Intergraf
SI	GZS-ZPPPI	ZDS-Sekcija za les in papir	None
SK	ZCPP-SR	None	None
UK	CPI	None	None

Note: *n.d.* = no data. * UNIDIS is affiliated to CEPI via COPACEL.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

A review of the membership of the national employer organisations/business associations is provided in Table 31. Like trade unions, most have few or no affiliations to European associations other than CEPI, and the organisational inventory highlights the status of CEPI as the sector's primary employer representative at European level.

Table 31: Other EU associations with paper sector national employer organisations/business associations as members, 2019

Other EU employer organisations/business association			Countries with an affiliate according to organisation websites
Abbreviation	Full name	Assessment of sector-relatedness	
CEI-Bois	The European Confederation of Wood Industry	Its members are mainly active in the woodworking industry – this likely reflects the fact that organisations in the sector often overlap with woodworking	AT, BE, DE, DK, EE, FI, HR, NL, PT, SE, SI, UK
CITPA	International Confederation of Paper and Board Converters in Europe	Most members are active in paper converting; cooperates with CEPI	AT, BE, DE, IT, PT, UK
ECMA	The European Carton Makers Association	A branch member of CITPA	Mostly has individual companies as members
FEFCO	European Federation of Corrugated Board Manufacturers	A branch member of CITPA	AT, BE, CZ, DE, ES, FI, FR, HR, HU, IT, NL, PL, PT, RO, SE, UK
FESPA	Federation of European Screen Printers Associations	Most members are active in screen printing, digital printing and textile printing	Divided into national organisations
FPE	Flexible Packaging Europe	Members are producers of flexible packaging, mostly for food items	Members are individual companies
Intergraf	The European Federation for Print and Digital Communication	Intergraf has 21 members – all are national printing associations	AT, BE, BG, DE, DK, EE, FI, FR, HU, IE, IT, LT, LU, LV, NL, PT, SE, UK
UEA	European Furniture Manufacturers' Federation	Its members are mainly active in the furniture industry	CZ, ES, PT, RO, UK

Note: CITPA was consulted as part of the feedback process in this study, and on 9 March 2020 it confirmed that the information regarding CITPA and FEFCO was correct.

Source: Authors' own compilation based on the Network of Eurofound Correspondents' national contributions to this study, 2019

Summary for countries with the largest sectoral workforce

This section looks first at membership structure in the six countries with the largest paper sector workforce in absolute numbers. Subsequently, the membership of IndustriAll Europe and CEPI is examined in EU Member States where the proportion of the paper workforce corresponds to 0.5% (or more) of total employees in the country.

Table 32 and Table 33 demonstrate that in the countries with the highest numbers employed in the paper sector, organisations are affiliated to IndustriAll Europe and/or CEPI, and at least one affiliate from IndustriAll Europe and/or CEPI is involved in collective bargaining (where collective bargaining exists in the sector). Other than Italy, which has the second-largest paper sector workforce (11% of the EU paper sector workforce), IndustriAll Europe has a trade union affiliated and involved in all countries with a large sectoral workforce. For Germany, the country with the largest sectoral workforce, IndustriAll Europe covers NACE code 17.1 only.

The eight countries with the largest paper sector workforce are represented by CEPI in the ESSDC for the paper sector. It is only in Germany and Poland that the organisation involved in collective bargaining is not affiliated to CEPI.

Table 32: Affiliations in countries with sectoral employment in excess of 20,000

	Total number employed (2016)	At least one trade union affiliated to IndustriAll Europe	At least one IndustriAll Europe affiliate involved in collective bargaining	At least one employer organisation affiliated to CEPI	At least one CEPI affiliate involved in collective bargaining
DE	144,021	Yes	Yes	Yes	No
IT	71,222	No	No	Yes	Yes
FR	64,655	Yes	Yes	Yes	Yes
PL	58,081	Yes	Yes	Yes	No
UK	57,077	Yes	Yes	Yes	Yes
ES	43,139	Yes	Yes	Yes	Yes
SE	33,979	Yes	Yes	Yes	Yes
FI	21,979	Yes	Yes	Yes	Yes

Notes: Countries are ordered according to the total number employed. Green shading indicates a positive response, while pink shading indicates a negative response.

Sources: Structural Business Statistics for data; Network of Eurofound Correspondents' national contributions to this study, 2019 for information on affiliations

Similarly, in the five Member States with the highest proportions of the national workforce in the paper sector, all have at least one IndustriAll Europe affiliate. The same is true on the employers' side for CEPI.

Table 33: Affiliations in the Member States where the paper sector is largest as a share of total employment

	Share of total employment (2016) (%)	At least one trade union affiliated to IndustriAll Europe	At least one IndustriAll Europe affiliate involved in collective bargaining	At least one employer organisation affiliated to CEPI	At least one CEPI affiliate involved in collective bargaining
FI	1.51	Yes	Yes	Yes	Yes
SE	1.06	Yes	Yes	Yes	Yes
SI	0.71	Yes	Yes	Yes	Yes
PL	0.64	Yes	Yes	Yes	No
AT	0.60	Yes	Yes	Yes	No

Notes: Countries are ordered according to share of total employment. Green shading indicates a positive response, while pink shading indicates a negative response.

Sources: Structural Business Statistics for data; Network of Eurofound Correspondents' national contributions to this study, 2019 for information on affiliations

The columns on the far right in Table 32 and Table 33 indicate that some Member States do not have a CEPI affiliate that is also involved in sector-related collective bargaining. In Austria and Germany, the associations that are CEPI members are viewed nationally as business associations. In both cases, there are other organisations active in collective bargaining in the sector that are thus seen nationally as being traditional employer organisations (FVPI and PROPAK in Austria and HPV and VAP in Germany). In Poland, there is no employer organisation involved in collective bargaining. The Polish CEPI affiliate included in this study is viewed nationally as a business association.

Capacity to negotiate of IndustriAll Europe and CEPI

Both CEPI and IndustriAll Europe indicate their objectives in their statutes (Article 3). For IndustriAll Europe, the promotion of social dialogue at all levels is mentioned in this article. Besides this, their involvement in the European sector social dialogue is not explicitly mentioned. On this basis, neither CEPI nor IndustriAll Europe are equipped with an explicit permanent statutory mandate to negotiate on behalf of their members in matters of the European social dialogue.

Rather, IndustriAll Europe's statutes provide for detailed mandate procedures in relation to the nominations for the ESSDCs in various sectors. According to Appendix II of the statutes, the

affiliates concerned can nominate members depending on the number of mandates in the working groups and plenary of the sectoral social dialogue. The delegation shall be composed taking into account sectoral and regional representativeness.

Moreover, the appendix also stipulates the procedure for platforms and statements in the sectoral social dialogue, obliging the sectoral social dialogue members to 'propose and prepare possible platforms and statements in close cooperation with the Secretariat' of IndustriAll Europe. Thereby, the 'members of the [sectoral social dialogue] shall act in line with the policies and procedures as agreed by the Executive Committee and Congress' as the highest bodies within the European federation in order to guarantee the participation of all national member unions in matters of the European social dialogue.

With regard to the internal mandate procedure for negotiations in the framework of the sectoral social dialogue, the Secretariat is responsible for informing the Executive Committee and the Social Dialogue Committee about the possibility of entering negotiations, while the 'Executive Committee shall decide, in consultation with the Social Dialogue Committee members, whether negotiations should take place'. At the suggestion of the Secretariat, the

decision on the platform for negotiations and the delegation shall be taken by the Executive Committee in consultation with the Social Dialogue Committee and all the affiliates possibly via a written procedure and by a two-thirds majority.

IndustriAll Europe has, thus, a well-defined procedure for obtaining a mandate and getting European sectoral social dialogue texts approved by its member organisations. It has the capacity to negotiate binding agreements, such as the NEPSI agreement,¹⁰ which also covers sectors outside of the paper sector.

¹⁰ This is the agreement on workers' health protection through the good handling and use of crystalline silica and products containing it.

No binding European sectoral social dialogue agreements have yet been reached specifically for the paper sector.

Although CEPI has a social affairs committee (CEPI, undated), European social dialogue activities are prepared in the CEPI group made up of directors of national member associations (the ADG). Final positions are adopted by the CEPI Board of Directors. These are prepared by various parties, from the expert groups up to the ADG, and adopted by CEPI’s board. CEPI’s statutes describe where the director-general is allowed to sign and where they must sign jointly with a member of the Board of Directors. For most social dialogue texts, it is enough to have the signature of CEPI’s director-general.

In terms of dissemination, CEPI specifies its ADG as the primary channel for disseminating and implementing any positions from the ESSDC at the Member State and local levels. Furthermore, the Board of Directors is composed of 32 chief executive officers from paper sector companies, and they disseminate relevant positions within their respective companies. When it comes to small and medium-sized enterprises, these rarely have sufficient human resources capacity to allow for attendance at European meetings; for them, the key channels are the national associations affiliated to CEPI. CEPI represents two-thirds of small and medium-sized enterprises in the paper sector through its membership structures.

Based on jointly agreed texts (Table 34), the ESSDC for the paper sector has a proven capacity to reach joint opinions on topics related to competitiveness and industrial policy as well as on social matters. In relation to the latter, see the 2012 joint text on health and safety practices and the 2016 joint text on skills and competencies.

Table 34: Joint texts agreed between CEPI and IndustriAll Europe in the ESSDC for the paper sector

Year	Title
2019	Joint Statement on ‘The Circular Bioeconomy – an opportunity for Europe’s growth and jobs’
2018	Joint resolution on the impact of digitalisation in the paper sector
2017	---
2016	CEPI and IndustriAll Europe (2016) (outcome of a joint project carried out in 2015–2016)
2015	Joint resolution on climate change
2014	Joint opinion on boosting the reindustrialisation of the EU
2014	Joint resolution on EU bio-energy policy
2013	---
2012	CEPI and EMCEF (2012) (outcome of a joint project carried out in 2011–2012)
2011	---

IndustriAll Europe reported that, in addition to its involvement in the ESSDC for the paper sector, it has activities related to the paper sector in its Network Chemicals and Basic Materials section. IndustriAll Europe has no network exclusive to the paper sector. The subjects covered are debated in the Industrial Policy Committee (raw materials supply, trade, decarbonisation, circular economy, etc.).

Paper sector joint opinions are endorsed by IndustriAll Europe through mandate procedures including a written consultation to all members of IndustriAll Europe in the ESSDC for the paper sector, which is also sent to members of the Network Chemicals and Basic Materials section and, depending on the subject, to the Committee for Industrial Policy or the Committee for Collective Bargaining and Social Policy and the entire Executive Committee. The consultation period is four weeks.

Results of the paper sector ESSDC are disseminated within IndustriAll Europe via its website/project websites/sections; at conferences (for example, EU Industry Days in 2018 and 2019, which included sessions promoting social dialogue including CEPI among the participants); via the Commission’s social dialogue newsletter; through press releases (shared with a pool of journalists); and in project outcomes and brochures.

Effective participation in the paper sector ESSDC

Looking at participation in the ESSDC for the paper sector for the years 2017 and 2018 (Table 35), the trade union side had participants from 12 countries and the employer delegation had participants from 10 countries.

Table 35: Effective participation in the ESSDC for the paper sector, 2017–2018

Countries with trade union participation in the ESSDC for the paper sector	AT, BE, DE, ES, FI, HR, HU, PL, PT, SE, SI, UK
Countries with employer organisation participation in the ESSDC for the paper sector	AT, BE, CZ, DE, ES, FI, FR, IT, PL, UK

Source: Eurofound and European Commission

IndustriAll Europe has affiliated paper sector trade unions in Austria, Belgium, Bulgaria, Czechia, Denmark, Finland, France, Germany, Hungary, Ireland, Malta, the Netherlands, Poland, Portugal, Slovenia, Spain, Sweden and the UK. No delegate from their members in Denmark, France and the Netherlands attended any meeting of the paper sector ESSDC in 2017 or 2018. Trade union participation was recorded from Croatia, though this study has indicated that IndustriAll Europe does not yet have a member organisation in that country.

CEPI has an affiliated employer organisation in Austria, Belgium, Czechia, Finland, France, Germany, Italy, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the UK. Even though CEPI has member organisations in the Netherlands, Portugal, Slovakia and Slovenia, none of their delegates attended meetings of the ESSDC for the paper sector in 2017 or 2018.

Member organisations that are not directly represented in meetings of the ESSDC are normally kept informed about developments in the committee via their participation in the meetings of statutory bodies of their European organisations or via the ESSDC intranet or website.

4. Conclusions

There are around 650,000 employees in the European paper sector, employed in about 20,000 companies. This number has been fairly stable since 2010, even though there has been variation at Member State level, with job losses in some countries and job gains in other countries (Figures 3 and 4). The largest paper sector workforce is in Germany, which has 144,021 employees, corresponding to 22% of the European sectoral workforce. The second-largest paper sector workforce is in Italy, followed by France, Poland, the UK, Spain, Sweden and Finland. For Finland and Sweden, the importance of the paper sector is greater than it is in other countries: in Finland 1.5% of the total workforce is employed in the paper sector, and in Sweden 1.1% of the total workforce is employed in this sector. For Luxembourg and Malta, information on the number of paper sector employees is not available, though trade unions reported 160 members in the paper sector in Luxembourg and 120 in Malta. This allows us to conclude that there are paper sector activities in all 27 EU Member States and the UK.

There are a few very large companies in the paper sector, with many more small and medium-sized companies (Table 4). About 2% of all the paper sector companies have more than 250 employees, and these employ 43% of the sectoral workforce. The largest employers in each of the EU Member States represent a significant part of the sectoral workforce (Table 5). On the other hand, 65% of companies in the sector have fewer than 10 employees, and these represent only 6% of employees in the sector (Figure 5).

This study identified trade unions in the paper sector in 25 Member States and the UK. None were found in Cyprus and Estonia. Sector-related employer organisations were identified in 22 Member States and the UK, the exceptions being Cyprus, Estonia, Hungary, Luxemburg and Malta. Most of these trade union organisations (96%) and employer organisations (82%) are involved in collective bargaining. The proportion of the sectoral workforce covered by collective bargaining is relatively high in the countries with a large sectoral workforce (Table 19). Other aspects of industrial relations in the paper sector include the relatively high trade union density (Table 10) and the establishment of European Works Councils by a small number of large paper sector multinational companies.

The ESSDC for the paper sector has been in place since 2010. It includes IndustriAll Europe and CEPI. IndustriAll Europe has 37 paper sector trade unions affiliated in 19 countries. For 16 countries, an affiliate of IndustriAll Europe covers the entire paper sector. Only in Czechia, Germany and Malta is this not the case. IndustriAll Europe has an affiliated trade union that is involved in collective bargaining in 19 countries. The seven Member States where there are paper sector trade unions involved in collective bargaining but not affiliated to IndustriAll Europe are Croatia, Greece, Italy, Latvia, Lithuania, Luxembourg, Romania and Slovakia (Tables 24 and 26).

This study also checked whether any other European trade union organisations have representativeness in the sector. This identified UNI Europa, which has 10 affiliated paper sector trade unions in 10 countries. UNI Europa has an affiliated paper sector trade union in Italy and in Latvia, where IndustriAll Europe does not have an affiliate. In Germany, the country with the largest paper sector workforce, part of the paper sector is organised by ver.di, a trade union that is affiliated to UNI Europa but not to IndustriAll Europe. However, UNI Europa only claims representativeness for the graphical sector, not for the paper sector. When considering packaging, paper converting and graphical activities altogether, UNI Europa claims to represent trade unions from 22 Member States (Table 29).

IndustriAll Europe has a proven capacity to negotiate. It has trade union members involved in collective bargaining in each of the top eight countries according to size of paper sector workforce (Table 32) and also

in the five countries for which the paper sector is proportionally most important (Table 33). Therefore, it can be concluded that **IndustriAll Europe is the most representative European trade union organisation for the paper sector, with a stronghold in NACE 17.1.**

CEPI has 18 paper sector employer organisations affiliated in 16 countries. In 14 countries, a CEPI affiliate covers the entire paper sector. Only in Austria and Italy is this not the case. In 13 countries, CEPI has an affiliated employer organisation that is involved in collective bargaining. There are six Member States (AT, DE, DK, HR, IE and LV) where there are employer organisations involved in collective bargaining but not affiliated to CEPI. CEPI has member organisations in Austria and Germany that are not involved in collective bargaining, while the employer organisations in those two countries where collective bargaining does take place are not affiliated to CEPI. CEPI has a member in Poland, but there is no employer organisation involved in any kind of collective bargaining in Poland (Tables 16 and 25). CEPI has a member organisation involved in collective bargaining in each of the countries with the largest workforces, except for Germany and Poland (Table 32).

CEPI can be considered representative both for the large paper sector companies and the small enterprises in the sector. CEPI's Board of Directors is made up of 32 chief executive officers from large paper sector companies, while two-thirds of the small enterprises in the paper sector in Europe are represented by CEPI through its affiliated national employer organisations. CEPI has, thus, demonstrated its capacity for negotiation.

A search for other European associations with some representativeness in the sector revealed the International Confederation of Paper and Board Converters in Europe (CITPA) with its two branch member organisations – the European Carton Makers Association (ECMA) and the European Federation of Corrugated Board Manufacturers (FEFCO). CEPI has cooperated with CITPA on several activities. CITPA was asked for information concerning its activities and mandate for social dialogue but did not respond.

CEPI has a member organisation in the top eight countries according to size of sector workforce and also in the five countries for which the paper sector is most important proportionally (Tables 32 and 33). On this basis, **CEPI can be considered as the most representative employer organisation for the paper sector and especially for the part of the paper sector related to NACE code 17.1.**

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Annex 1: Supplementary information

Table 36: Trade unions in the paper sector, 2019

	Abbreviation	Full name in English	Full name in original language
AT	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier
	PRO-GE	Manufacturing Union	Produktions-Gewerkschaft
BE	ABVV-FGTB	ABVV-FGTB General Federation	ABVV-FGTB Algemene Centrale/Centrale Générale
	ACV-BIE	ACV Construction – Industry and Energy	ACV Bouw – Industrie & Energie
	CNE	National Federation for White-Collar Workers	Centrale Nationale des Employés
	ACLVB-CGSLB	General Federation of Liberal Trade Unions in Belgium	Algemene Centrale der Liberale Vakverbonden van België (ACLVB)-Centrale Générale des Syndicats Libéraux de Belgique (CGSLB)
	BBTk-SETCa	Union of White-Collar Workers, Technicians and Professional and Managerial Staff	Bond van Bedienden, Technici en Kaderleden (BBTK)-Syndicat des Employés, Techniciens et Cadres (SETCa)
BG	ФСОГСДП	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry	Федерация на синдикалните организации от горското стопанство и дървопреработващата промишленост
	ФЛПНАКТ 'Подкрепа'	Federation of Light Industry/Podkrepa	Федерация 'Лека промишленост' на Конфедерацията на труда 'Подкрепа'
	НФТ 'ХИМИЯ И ИНДУСТРИЯ'	National Labour Federation 'Chemistry and Industry'	Национална федерация на труда 'Химия и индустрия'
	Федерация 'Химия'	Federation 'Chemistry'	Федерация 'Химия'
CY	No trade unions in the sector		
CZ	OS DLV ČR	Trade Union of Workers in Woodworking Industry, Forestry and Management of Water Supplies of the Czech Republic	Odborový svaz pracovníků dřevozpracujících odvětví, lesního a vodního hospodářství v ČR
	OS ECHO	Trade Union ECHO	Odborový svaz ECHO
	Č-MOS	Czech–Moravian Trade Union Association (name not used)	Česko-moravské odborové sdružení
	SNO	The New Trade Unions	Svaz Nové odbory
DE	IGBCE	Mining Chemicals and Energy Industrial Union	Industriegewerkschaft Bergbau Chemie Energie
	ver.di	United Services Union	Vereinte Dienstleistungsgewerkschaft
DK	3F	United Federation of Danish Workers	Fagligt Fælles Forbund
EE	No trade unions in the sector		
EL	Ομοσπονδία Μισθωτών Τύπου και Βιομηχανίας Χάρτου Ελλάδος (Omospondía Misthotón Týrou kai Viomichanías Chártou Elládos)	Federation of Press and Paper Industry Employees of Greece	Ομοσπονδία Μισθωτών Τύπου και Βιομηχανίας Χάρτου Ελλάδος (Omospondía Misthotón Týrou kai Viomichanías Chártou Elládos)

	Viomichanías Chártou Elládos) (no abbreviation)		
ES	FSC-CCOO	Federation of Services, Workers' Commissions	Federación de Servicios a la Ciudadanía – Comisiones Obreras
	FICA-UGT	Federation of Manufacturing, Construction and Agriculture, General Workers' Union	Federación de Industria, Construcción y Agro, Unión General de Trabajadores
FI	Paperiliitto	Finnish Paperworkers' Union	Paperiliitto r.y.
	Pro	Trade Union Pro	Ammattiliitto Pro
	YTN	Federation of Professional and Managerial Staff	Ylemmät toimihenkilöt YTN
	IL	Union of Professional Engineers in Finland	Insinööriliitto
	TEK	Academic Engineers and Architects in Finland	Tekniikan Akateemiset
	Sähköliitto	Finnish Electrical Workers' Union	Sähköliitto
	Suomen konepäällystöliitto	Finnish Engine Officers' Union	Suomen konepäällystöliitto
FR	FG-FO	General Federation FO-FO Construction	Fédération Générale Force Ouvrière-FO Construction
	Filpac-CGT	CGT Federation of Book, Paper and Communication Industries Workers	Fédération CGT des travailleurs des industries du livre, du papier et de la communication
	FCE-CFDT	Chemical Federation of the French Democratic Confederation of Labour	Fédération de la Chimie de la Confédération française démocratique du travail
	FIBOPA CFE-CGC	Wood-Paper-Sector of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff	Filière-Bois-Papier de la Confédération française de l'encadrement – Confédération générale des cadres
HR	SSH	Autonomous Trade Union	Samostalni Sindikat Hrvatske
HU	VDSZ	Trade Union of Paper Workers	Papíripari Dolgozók Szakszervezete
IE	SIPTU	Services Industry and Professional Technical Union	Services Industry and Professional Technical Union
	Connect	Connect Trade Union	Connect Trade Union
	Unite	Unite the Union	Unite the Union
IT	SLC-CGIL	Communication Workers' Trade Union	Sindacato Lavoratori della Comunicazione
	FISTEL-CISL	Federation of Information, Performing Arts and Telecommunications	Federazione Informazione, Spettacolo e Telecomunicazioni
	UILCOM-UIL	Italian Union of Communication Workers	Unione Italiana Lavoratori della Comunicazione
	UGL Carta e Stampa	General Union of Labour – Paper and Print	Unione Generale del Lavoro – Carta e Stampa
LT	LMPF	Lithuanian Federation of Forest and Woodworkers Trade Unions	Lietuvos miško ir miško pramonės darbuotojų profesinių sąjungų federacija
LU	OGB-L	Trade Union for Wood, Rubber, Ceramic, Chemistry, Cement, Paper, Plastic, Textiles and Glass	Syndicat bois, caoutchouc, céramique, chimie, ciment, papier, plastique, textiles et verre
LV	LPNA	Latvian Graphical Industry Trade Union	Latvijas Poligrāfijas nozares arodbiedrība

	LMNA	Forest Sphere Workers' Trade Union	Latvijas Meža nozares arodbiedrība
MT	GWU	General Workers' Union	General Workers' Union
NL	CNV Vakmensen	The Christian Dutch Trade Union – Professionals	Christelijke Nederlandse Vakbond – Vakmensen
	FNV Procesindustrie	Federal Dutch Union Movement Production Industry	Federatie Nederlandse Vakbeweging Procesindustrie
PL	KSPCh NSZZ 'Solidarnosc'	National Secretariat of Chemical Industry of the Independent Self-governing Trade Union 'Solidarnosc'	Krajowy Sekretariat Przemysłu Chemicznego Niezależnego Samorządnego Związku Zawodowego 'Solidarnosc'
	MZZP IP Sp. z o.o. w Kwidzynie	Interplant Trade Union of International Paper Kwidzyn Ltd Employees in Kwidzyn	Miedzynakładowy Związek Zawodowy Pracowników International Paper Kwidzyn Sp. z o.o. w Kwidzynie
PT	FIEQUIMETAL	Federation of Unions in the Metal, Chemical, Electric, Pharmaceutical, Pulp, Paper, and Graphical Industries and in Press, Energy and Mining	Federação Intersindical das Indústrias Metalúrgicas, Químicas, Eléctricas, Farmacêutica, Celulose, Papel, Gráfica, Imprensa, Energia e Minas
	SINDETELCO	Democratic Union of Workers in Postal Services, Telecommunications, Media and Services	Sindicato Democrático dos Trabalhadores dos Correios, Telecomunicações, Media e Serviços
	SITEMAQ	Union of Merchant Marine, Manufacturing and Energy	Sindicato da Marinha Mercante, Indústrias e Energia
	SIFOMATE	Union of Stokers, Energies and Manufacturing	Sindicato do Fogueiros, Energias e Indústrias Transformadoras
	SIMA	Union of Metal Manufacturing and Related Areas	Sindicato das Indústrias Metalúrgicas e Afins
	SITese	Union of Workers and Technical Staff in Services, Commerce, Restaurants and Tourism	Sindicato dos Trabalhadores e Técnicos de Serviços, Comércio, Restauração e Turismo
	SINDEQ	Democratic Union of Energy, Chemical, Textiles and Other Industries	Sindicato Democrático da Energia, Química, Têxtil e Indústrias Diversas
	RO	FMLCH	Trade Union Federation of Forestry, Furniture, Cellulose and Paper Industry Workers
SE	Ledarna	Ledarna	Ledarna
	Unionen	Unionen	Unionen
	Sveriges Ingenjörer	Swedish Association of Graduate Engineers	Sveriges Ingenjörer
	Pappers	The Swedish Paper Workers' Union	Svenska pappersindustriarbetarförbundet
	GS-facket	The Swedish Union for Forestry, Wood and Graphic Industries	Facket för skogs-, trä och grafisk bransch
SI	SPDS-KSS PERGAM	Trade Union of Paper Industry-Trade Union Confederation PERGAM	Sindikat papirne dejavnosti Slovenije-Konfederacija sindikatov Slovenije PERGAM
SK	OZ DLV	Trade Union Association Wood, Forest and Water	Odborový zväz Drevo, Lesy, Voda
UK	Unite the Union	Unite the Union	Unite the Union
	GMB	General Municipal and Boilermakers Union	General Municipal and Boilermakers Union
	USDAW	United Shops, Distribution and Allied Workers	United Shops, Distribution and Allied Workers

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 37: Employer organisations/business associations in the paper sector, 2019

	Abbreviation	Full name in English	Full name in original language
AT	FVPI	Association of the Paper Industry	Fachverband der Papierindustrie
	Austropapier	Association of the Austrian Paper Industry	Austropapier – Vereinigung der Österreichischen Papierindustrie
	PROPAK	Association of Industrial Manufacturers of Paper and Paperboard Products	Fachverband der Industriellen Hersteller von Produkten aus Papier und Karton in Österreich
BE	Cobelpa	Association of the Belgian Manufacturers of Paper Dough, Paper and Cardboard	Vereiniging van de Belgische fabrikanten van papierdeeg, papier en karton
	Fetra	Fetra	Fetra
	Indufed	Indufed	Indufed
BG	БКнаЦХП	Branch Chamber of the Bulgarian Pulp and Paper Industry	Браншовакамаранацелулозно-хартинатапромишленост
CY	No employer organisations in the sector		
CZ	ACPP	Association of the Pulp and Paper Industry	Asociace českého papírenského průmyslu
DE	HPV	Federation of Paper, Cardboard and Plastics Processing Industry	Hauptverband Papier- und Kunststoffverarbeitung
	VAP	Federation of the German Industries Employers' Associations	Vereinigung der Arbeitgeberverbände der Deutschen Papierindustrie
	VDP	German Pulp and Paper Association	Verband Deutscher Papierfabriken
DK	DI	Confederation of Danish Industry	Dansk Industri
EE	No employer organisations in the sector		
EL	SEV	Hellenic Federation of Enterprises	Sindesmos Epiriseon kai Viomihanion
ES	ASPAPEL	Spanish Association of Pulp, Paper and Cardboard Manufacturers	Asociación Española de Fabricantes de Pasta, Papel y Cartón
	FEIGRAF	Business Federation of Graphic Industries of Spain	Federación Empresarial de Industrias Gráficas de España
	AFCO	Spanish Association of Manufacturers of Corrugated Cardboard Packaging	Asociación Española de Fabricantes de Envases y Embalajes de Cartón Ondulado
FI	Metsäteollisuus	Finnish Forest Industries	Metsäteollisuus ry
FR	UNIDIS/COPACEL	Paper and Cardboard Intersector Union for Dialogue and Social Engineering	Union Intersecteurs Papiers Cartons pour le Dialogue et l'Ingénierie Sociale
	CAP/FFCP	Federation CAP (Cardboard and Stationery Articles)	Fédération Française du Cartonnage et Articles de Papeterie
HR	HUP UDPI	Croatian Employers' Association – Wood and Paper Industry Association	Hrvatska udruga poslodavaca, Udruga drvne i papirne industrije
HU	No employer organisations in the sector		
IE	IPF	Irish Printing Federation	Irish Printing Federation
IT	Assografici	Italian National Association of Graphic and Paper Converting Industries	Associazione Nazionale Italiana Industrie Grafiche, Cartotecniche e Trasformatrici

	Assocarta	Italian Association of Pulp, Paper and Board Manufacturing Companies	Associazione Italiana fra gli Industriali della Carta, Cartoni e Paste per Carta
	UNIGEC-Confapi	Italian National Association of Graphic and Paper Converting Industries	Unione nazionale piccola e media industria grafica editoriale cartacea cartotecnica e affine
LT	LM	Lithuanian Forest Association	Asociacija Lietuvos mediena
LU	No employer organisations in the sector		
LV	LPUA	Association of Latvian Printing Companies	Latvijas Poligrāfijas uzņēmumu asociācija
MT	No employer organisations in the sector		
NL	VNP	Royal Association of Dutch Paper and Cardboard Factories	VNP – Koninklijke Vereniging van Nederlandse Papier- en Kartonfabrieken
	Kartoflex	Kartoflex	Kartoflex
PL	SPP	Association of Polish Papermakers	Stowarzyszenie Papierników Polskich
PT	ANIPC	The National Pulp and Paper Industry Association	Associação Nacional dos Industriais de Papel e Cartão
	APIGRAF	Portuguese Association of Graphics Industries and Paper Manufacturing	Associação Portuguesa das Indústrias Gráficas e Transformadoras do Papel
	CELPA	Association of the Paper Industry	Associação da Indústria Papeleira
RO	PICH-ROMPAP	Pulp and Paper Industry Employers' Organisation	Patronatul Industriei de Celuloză și Hârtie
SE	Grafiska Företagen	Swedish Graphics Industries Federation	Grafiska Företagen
	Industriarbetsgivarna	The Swedish Association of Industrial Employers	Industriarbetsgivarna
SI	GZS-ZPPPI	Chamber of Commerce and Industry of Slovenia – Association for Paper and Paper Converting Industry	Gospodarska zbornica Slovenije – Združenje za papirno in papirno predelovalno industrijo
	ZDS-Sekcija za les in papir	Association of Employers of Slovenia – Wood and Paper Industry Section	Združenje delodajalcev Slovenije – Sekcija za les in papir
SK	ZCPP-SR	Association of Pulp and Paper Industry of the Slovak Republic	Zväz celulózo-papierenského priemyslu Slovenskej republiky
UK	CPI	Confederation of Paper Industries	Confederation of Paper Industries

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 38: Persons employed, by NACE code (number and % of the country's sectoral employees), 2016

	Number of persons employed in NACE 17.1	Number of persons employed in NACE 17.2	Total number of employees in the paper sector	Share of employees in NACE 17.1 (%)	Share of employees in NACE 17.2 (%)
AT	6,929	9,746	16,675	42	58
BE	2,818	8,137	10,955	26	74
BG	1,758	8,551	10,309	17	83
CY	n.d.	n.d.			
CZ	3,449	17,166	20,615	17	83
DE	39,963	104,058	144,021	28	72
DK	190	4,527	4,717	4	96

EE	n.d.	n.d.				
EL	774	6,533	7,307	11	89	
ES	9,171	33,968	43,139	21	79	
FI	18,672	3,307	21,979	85	15	
FR	15,155	49,501	64,656	23	77	
HR	729	3,752	4,481	16	84	
HU	1,001	13,912	14,913	7	93	
IE	66	3,068	3,134	2	98	
IT	11,907	59,315	71,222	17	83	
LT	247	4,362	4,609	5	95	
LU	n.d.	n.d.				
LV	12	1,417	1,429	1	99	
MT	n.d.	n.d.				
NL	3,740	13,378	17,118	22	78	
PL	7,910	50,171	58,081	14	86	
PT	1,978	8,457	10,435	19	81	
RO	2,276	12,104	14,380	16	84	
SE	24,636	9,343	33,979	73	27	
SI	1,503	2,768	4,271	35	65	
SK	2,183	4,773	6,956	31	69	
UK	n.d.	n.d.				
Total	157,067	432,314	589,381	27	73	

Note: n.d. = no data.

Source: Eurostat, Structural Business Statistics, 2016

Table 39: Characteristics of the largest companies in the paper sector, 2019

	Largest companies in the sector	Number of employees (estimates)	Trade unions involved	Employer organisations involved	Collective bargaining (SEB/MEB/both/none)	Sector activity (17.1 and/or 17.2)
AT	Sappi Gratkorn	1,240	GPA-djp, PRO-GE	FVPI, Austropapier	MEB	17.1
	Mondi Neusiedler	900	GPA-djp, PRO-GE	FVPI, Austropapier	MEB	Most activities in 17.1 and smaller activities in 17.2
	Mayr-Melnhof Frohnleiten	800	GPA-djp, PRO-GE	FVPI, Austropapier	MEB	17.1
BE	VPK Packaging	525	ACLVB-CGSLB, CNE, ABVV-FGTB	Cobelpa	Both	17.1
	Sappi Lanaken	503	CNE, ABVV-FGTB (ACLVB-CGSLB presence unknown)	Cobelpa	Both	17.2

	Amcor Flexibles Transpac	581	CNE, ABVV-FGTB (ACLVB-CGSLB presence unknown)	Fetra	Both	17.2
BG	Mondi Stambolijski EAD	350	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry, Federation of Light Industry/Podkrep a	Branch Chamber of the Bulgarian Pulp and Paper Industry	MEB	17.1
	DS Smith Bulgaria	500	Bulgarian Federation of Trade Union Organizations in Forestry and Woodworking Industry, Federation of Light Industry/Podkrep a	Branch Chamber of the Bulgarian Pulp and Paper Industry	MEB	Both
	Dunapack Rodina	160	None	Branch Chamber of the Bulgarian Pulp and Paper Industry	MEB	17.2
CY	Nikyr Products & Co Ltd	105	None	Cyprus Association of Tissue Paper Converters (inactive organisation)	None	17.2
	P&S Carton Industries Ltd	80	None	Cyprus Association of Tissue Paper Converters (inactive organisation)	None	17.2
CZ	Mondi Štětí a.s.	700	Základní organizace OS DLV v Mondi Štětí a.s.	ACPP	Both	17.1
	Lenzing Biocel Paskov a.s.	410	Základní organizace OS DLV v Lenzing Biocel Paskov a.s., Základní organizace Českomoravského	ACPP	Both	Both

			odborové sdružení v Lenzing Biocel Paskov a.s.			
	Krpa Paper a.s.	200	Základní organizace OS DLV v Krpa Paper a.s.	ACPP	Both	Both
DE	Smurfit Kappa	5,000	ver.di	VAP	MEB	Both
	Essity	4,500	ver.di	VAP	MEB	17.2
	UPM-Kymmene	3,300	ver.di	VAP	MEB	Both
DK	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
EE	Horizon Tselluloosi ja Paberi AS	372	n.d.	None	n.d.	Both
	Victor Stationery OÜ	103	n.d.	None	n.d.	17.2
	Estonian Cell AS	92	n.d.	Estonian Forest and Wood Industries Association (EMPL)	n.d.	17.1
EL	MEGA Disposables SA	440	Workers' Association of MEGA Disposables SA	SEV	None	Both
	DS Smith Hellas SA	323	Workers' Association of DS Smith Hellas SA Packaging Items Industry, Thessaloniki, Korinthos	Federation of Industries of Northern Greece (SVVE)	SEB	17.2
	Macedonian Paper Mills (MEL)	190	Workers' Association of Macedonian Paper Mills (MEL)	SEV	SEB	17.1
ES	Torraspapel SA	1,741	FSC-CCOO, FICA-UGT, LAB	CEOE	MEB	17.1
	Sociedad Anónima Industrias Celulosa Aragonesa (SAICA)	661	FSC-CCOO, FICA-UGT, OSTA	CEOE	Both	17.1
	Papeles y Cartones de Europa SA	587	FSC-CCOO, FICA-UGT	CEOE	MEB	17.1
FI	Stora Enso	26,026 (globally)	Paperiliitto, Pro, YTN	Metsäteollisuus	MEB	Both
	UPM-Kymmene	19,489 (globally)	Paperiliitto, Pro, YTN	Metsäteollisuus	MEB	Both
	Metsä Group	9,126 (globally)	Paperiliitto, Pro, YTN	Metsäteollisuus	MEB	Both
FR	Smurfit Kappa France	5,400	FCE-CFDT, FIBOPA CFE-CGC, CFTC,	UNIDIS (or federation)	Both	17.1

			Filpac-CGT, Solidaires	affiliated to UNIDIS)		
	Essity	2,000–3,000	FCE-CFDT, FIBOPA CFE-CGC, Filpac-CGT, FG-FO	UNIDIS (or federation affiliated to UNIDIS)	Both	17.2
	Clairefontaine	2,666	FG-FO, CGT	UNIDIS (or federation affiliated to UNIDIS)	Both	17.2
HR	DS Smith Paper Belišće	430	Autonomous Trade Union	None	SEB	Both
	Bilokalnik Koprivnica	200	Autonomous Trade Union	None	SEB	Both
	Jedinstvo Ivanec	150	Autonomous Trade Union	None	SEB	Both
HU	Dunapack	630	VDSZ	None	MEB	Both
	DIPA Zrt.	160	VDSZ	None	MEB	Both
	Halaspack	146	VDSZ	None	MEB	Both
IE	Smurfit Kappa	46,000 in Smurfit Kappa in total, but only a fraction are classified as NACE 17	SIPTU, Connect, Unite	IPF	SEB	Both
	Segezha Packaging	1,158	n.d.	n.d.	n.d.	17.2
	Hasbro Ireland	339	SIPTU	n.d.	SEB	17.2
IT	Cartiere Burgo	3,000	FISTEL-CISL, SLC-CGIL, UILCOM-UIL	Assocarta	Both	17.1
	Fedrigoni	1,700	FISTEL-CISL, SLC-CGIL, UILCOM-UIL	Assocarta	Both	17.1
	Gruppo Reno De Medici	650	FISTEL-CISL, SLC-CGIL, UILCOM-UIL, CUB Informazione	Assocarta	Both	17.1
LT	AB Grigeo	282	Trade Union of AB Grigeo	Lithuanian Forest Association, Feropa	SEB	17.2
	AB Grigeo Klaipėda	181	Trade Union of AB Grigeo Klaipėda	Part of AB Grigeo company	SEB	17.1
	UAB Grigeo Baltwood	141	n.d.	Part of AB Grigeo company	n.d.	17.1
LU	Avery Dennison Luxembourg Sàrl	430	OGB-L	n.d.	SEB	17.1
	Corex Luxembourg SA	25	OGB-L	n.d.	SEB	17.2
	Etilux Luxembourg Sàrl	5	OGB-L	n.d.	None	17.2

LV	Stora Enso	144	n.d.	n.d.	n.d.	17.2
	Liepājas papīrs	104	Its own trade union assisted by LMNA	LPUA	SEB	17.2
	VG Kvadra Pak	133	Its own trade union assisted by LPNA	LPUA	SEB	17.2
MT	Multi Packaging Ltd	60	GWU	None	SEB	17.2
	Karta Convertors	34	GWU	None	SEB	17.2
	J&A Bonnici Ltd	n.d.	None	None	None	17.2
NL	Wepa	200	n.d.	VNP	MEB	Both
	Smurfit Kappa	200	n.d.	VNP	MEB	Both
	Papierfabriek Doetinchem	190	n.d.	VNP	MEB	Both
PL	International Paper Kwidzyn Ltd.	2,500	KSPCh NSZZ 'Solidarnosc'	SPP	SEB	Both
	Mondi Swiecie Group Co.	1,200	KSPCh NSZZ 'Solidarnosc', NSZZ Pracownikow Mondi Swiecie	SPP	SEB	17.1
	TFP Ltd	1,000	None	SPP	None	Both
PT	The Navigator Company	2,800	FIEQUIMETAL, SITESE, COFESINT	CELPA	Both	Both
	Europa & C Embalagem	340	n.d.	ANIPC	SEB	17.2
	EUROPA & C KRAFT Viana (DS Smith)	270	n.d.	CELPA	SEB	17.2
RO	Vrancart SA	1,072	One trade union with 318 union members (in 2017)	PICH-ROMPAP	SEB	17.2
	Ambro SA – member of the Rossmann Group	601	'Arborii Bucovinei' Trade Union	PICH-ROMPAP	SEB	17.1
	Pehart Tec Grup SA	446	n.d.	PICH-ROMPAP	SEB	17.1
SE	Stora Enso	5,170	Pappers, Ledarna, Sveriges Ingenjörer, Unionen	Industriarbetsgi varna	MEB	Both
	Billerud Korsnäs	4,395	Pappers, Ledarna, Sveriges Ingenjörer, Unionen	Industriarbetsgi varna	MEB	Both
	Svenska Cellulosa AB (SCA)	4,127	Pappers, Ledarna, Sveriges Ingenjörer, Unionen	Industriarbetsgi varna	MEB	Both

SI	PALOMA D.D.	700	SPDS-KSS PERGAM	GZS-ZPPPI	SEB	Both
	VIPAP VIDEM KRŠKO, D.D.	350	SPDS-KSS PERGAM	GZS-ZPPPI	SEB	Both
	KOLIČEVO KARTON D.O.O.	385	SPDS-KSS PERGAM	GZS-ZPPPI	SEB	Both
SK	Mondi SCP, Ruzomberok	1,800	OZ DLV	ZCPP-SR	Both	17.1
	SCA Hygiene Products Slovakia, Gemerská Horka	950	None	None	None	17.2
	Grafobal, Skalica	700	None	None	None	17.2
UK	DS Smith Paper	4,900	Unite the Union, GMB	CPI	n.d.	Both
	Smurfit Kappa	3,000	Unite the Union, GMB	CPI	n.d.	Both
	Essity	1,000	Unite the Union	CPI	Plant-level bargaining	17.2

Notes: SEB = single-employer bargaining. MEB = multi-employer bargaining. n.d. = no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Annex 2: Network of Eurofound Correspondents

Table 40: Correspondents who contributed to the study

Country	Correspondent	Organisation
Austria	Georg Adam	FORBA
Belgium	Dries Van Herreweghe	HIVA–KU Leuven
Bulgaria	Violeta Ivanova	Institute of Social and Trade Union Research (ISTUR)
Cyprus	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
Croatia	Predrag Bejakovic Irena Klemencic	Institute of Public Finance (IPF, Institut za javne financije)
Czechia	Petr Pojer	Research Institute for Labour and Social Affairs
Denmark	Carsten Jorgensen	FAOS, University of Copenhagen
Estonia	Ingel Kadarik	Praxis Centre for Policy Studies
Finland	Rasmus Firon	Oxford Research AB
France	Frédéric Turlan	IR Share
Germany	Sandra Vogel Birgit Kraemer	German Economic Institute Institute for Economic and Social Research, Hans Boeckler Foundation
Greece	Penny Georgiadou	GSEE Labour Institute
Hungary	Nóra Krokovay	Kopint-Tárki Institute for Economic Research
Ireland	Andy Prendergast	IRN Publishing
Italy	Lisa Dorigatti	Department of Social and Political Sciences, University of Milan
Latvia	Krišs Karnītis Raita Karnite	EPC Ltd
Lithuania	Inga Blaziene	Lithuanian Social Research Centre
Luxembourg	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
Malta	Louis Grech	University of Malta
Netherlands	Amber van der Graaf	Panteia BV
Poland	Maciej Pańków	Foundation Institute of Public Affairs
Portugal	Reinhard Naumann	Friedrich Ebert Foundation (Lisbon)
Romania	Simona Ghita Valentina Vasile Cristina Boboc	Bucharest Academy of Economic Studies European Institute of Romania European Institute of Romania
Slovakia	Ludovit Cziria	Institute for Labour and Family Research
Slovenia	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
Spain	Oscar Molina	Institute for Labour Studies, Universitat Autònoma de Barcelona
Sweden	Sirin Celik (Kara)	Oxford Research AB
United Kingdom	Claire Evans	Warwick Business School

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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the paper 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 studies on representativeness is to identify the relevant national and European social partner organisations in the EU Member States. This study identified the Confederation of European Paper Industries (CEPI) (representing the employers) and IndustriAll Europe (representing the employees) as the most representative European-level social partner organisations in the paper sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

