European Sectoral Social Dialogue
Recent developments

2010 edition

European Commission

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Introduction

Introduction

Sectoral social dialogue – a key element of the European Social Model and a tool of modern industrial policy and good governance

The European social dialogue is recognised as a pillar of the European social model. It embodies the principle of social subsidiarity and complements the national practices of social dialogue and industrial relations, while acknowledging the autonomy of social partners – i.e. the representatives of management and labour (employers' organisations and trade unions) – and the diversity of industrial relations in Europe. It is the essential means by which the social partners contribute to the governance of the European Union and the definition of European social standards.

Social dialogue between representative organisations of workers and employers at all levels – company, local, regional, sectoral, national, and European – is essential for sustainable development, growth and employment creation, business performance and international competitiveness, job quality and good employment practices, as well as efficient and productive industrial relations.

Social dialogue is a characteristic of the employment relationship in all EU Member States. It is furthermore firmly embedded at European level, both across and within economic sectors. Its success derives from a high level of shared ambition amongst social partners and their joint commitment to effectively represent their member organisations at European level, respond effectively to consultations on EU policy initiatives, identify relevant topics of common interest, engage in meaningful discussions, actions and/or negotiations on these topics, and actively follow up and implement the outcomes.

The joint actions by the social partners are underpinned by a political framework at EU level that recognises, encourages, promotes and supports social dialogue as central to improving understanding, building trust, reaching agreement and developing concrete outcomes of practical relevance for firms and workers, including joint positions, good practices, guidelines and codes of conduct, frameworks of action and negotiated agreements.

The EU Treaties stipulate in particular that the Union recognises and promotes the role of social partners at its level and facilitates dialogue between them. The Treaties formally recognise the Tripartite Social Summit for Growth and Employment (Art. 152 TFEU ([1]) and entitle social partners to exclusive consultations on policy initiatives in the area of employment and social affairs (Art. 154 TFEU). They also confer upon social partners the possibility to initiate European legislation in this policy area through negotiations that suspend any legislative initiative by the European Commission and agreements that can be transposed into EU law upon their request (Art. 155 TFEU) – a unique role for the social partners that is sometimes referred to as a role of *co-legislators*. The European Commission facilitates the European social dialogue by ensuring balanced support to the parties.

European sectoral social dialogue produces outcomes of practical importance to workers and companies and makes a significant contribution to the governance of the EU as a whole. Beyond regulations and standards that the social partners help to elaborate through their contributions to consultations and the implementation of their common agreements, the European social dialogue has developed many tools of soft law such as guidelines, codes of conduct, joint reporting standards and frameworks of action. In total, European sectoral social dialogue has so far developed more than 500 texts and outcomes ([2]), and social partners have undertaken many transnational joint projects ([3]). The transnational nature of these projects means that they make a very practical contribution to increasing the interplay between industrial relations actors at the European and national levels.

Building in part on the recent comprehensive analysis by the European Foundation for the Improvement of Living and Working Conditions on the dynamics of European sectoral social dialogue ([4]), this brochure summarises recent developments in this dialogue and provides detailed overviews of the activities and outcomes of the European sectoral social dialogue committees. It accompanies a Commission Staff Working Paper reviewing the functioning and potential of European sectoral social dialogue committees since their formal establishment in 1998 ([5]). This paper is based on an in-depth consultation of European social partners and their member organisations which took place in 2008/2009 and also contains proposals and commitments for further enhancing the functioning and potential of European sectoral social dialogue committees where appropriate.

Sectoral social dialogue committees (SSDCs) – dynamic and productive instruments for the benefit of 145 million workers and more than 6 million undertakings

Several forms of European social dialogue structure have developed since the 1950s/60s, starting mainly in agriculture and the industrial and transport sectors. A first generation of committees involving the social partners at European level stemmed from the advisory and joint committees which were created in sectors such as steel, mining, agriculture and sea fisheries as part of the ECSC Treaty and the initial steps towards the Common Market.

A second generation of committees formed in the 1990s in sectors such as construction, banking, commerce, insurance, postal services, telecommunications and electricity, as joint committees

([1]) Treaty on the Functioning of the European Union

([2]) Published in the European social dialogue text database under: http://ec.europa.eu/employment_social/dsw ; also see annexes 5 and 6 for more detail.

([3]) Partly co-financed by the European Commission.

([4]) http://www.eurofound.europa.eu/publications/htmlfiles/ef0898.htm

([5]) Commission Staff Working Paper on the functioning and potential of European sectoral social dialogue, SEC(2010) 964 (final).

or informal working groups, mainly in relation to the creation of the internal market and in response to liberalisation and privatisation and increasing cross-border mobility of workers.

In 1998 the Commission adopted a Decision to formally establish SSDCs at European level (6) to be consulted on EU-level developments with social implications and to develop and promote social dialogue at sectoral level. The Decision lays down the provisions concerning the establishment, representativeness and operation of new SSDCs, intended as central bodies for consultation, joint action and negotiation. Upon joint request by the social partners, the Commission supports the creation of new committees if the conditions laid down by the 1998 Decision are met (7).

Following the 1998 Commission Decision, the then existing 24 first and second generation committees were transformed into European SSDCs. Moreover, European sectoral social dialogue developed further and extended rapidly, with the creation of many new SSDCs in such diverse sectors as hospitals, catering, shipyards, chemical industry, audiovisual services, live performance and professional football. These committees focus on a variety of issues, including qualifications, skill needs and mobility of workers, health and safety and the image of the sector or aim at influencing European policies in specific areas of interest to the sector, including trade policy, chemicals, health and consumer protection legislation, climate change policies and public procurement (8).

Taking into account the recent launch of three new SSDCs in 2010 (for the paper industry, metal, engineering and technology-based industries, and education), there are 40 European SSDCs in existence, covering some 145 million workers, i.e. more than three quarter of the EU's workforce, and more than 6 million undertakings in the EU. Discussions are also underway with regard to the formalisation of the sectoral social dialogue committee for central administrations (currently in a test phase) and the possible creation of new committees for the sectors of ports, sport and active leisure, and the social economy. The social partners of the agro-food industry have also started exploring the possibility of a sectoral social dialogue committee, following a recent recommendation by the High-level Group on the Competitiveness of the Agro-food Industry.

While European sectoral social dialogue largely covers the primary and secondary sectors of the economy, with the notable exceptions of the agro-food industry, water collection and supply, waste collection and oil refining, several services sectors are still without an organised social dialogue at European level. These include in particular: information, communication and technology services (ICTS); legal, business, marketing and office support services; financial broker and real estate activities; science, research and development; social services; and household services – which together account for almost 20 million employees in the EU.

Against the differences between the sectors that are actively engaged in European sectoral social dialogue – in terms of activities, interests and the size and structure of the actors – the Commission Decision of 1998 provides a flexible framework in which the European social partners can set up a sectoral social dialogue committee and decide on the rules of procedure of that committee as well as on its work programme.

The European social partners

European social partners are representative EU-level organisations which are engaged in the European social dialogue, as provided for under Articles 152, 154 and 155 TFEU. The question of the representativeness of the social partner organisations at European level is fundamental as it constitutes the basis of their right to be consulted by the Commission (Art. 154 TFEU) and to engage in negotiations leading to agreements to be implemented by a Council decision or in accordance with relevant national procedures and practices (Art. 155 TFEU).

The Commission has clearly set out the criteria for the representativeness of the European social partners in a Communication in 2004 (9) as well as in its 1998 Decision establishing SSDCs. To be representative, organisations shall: (a) be cross-industry or relate to specific sectors or categories and be organised at European level; (b) consist of organisations which are themselves an integral and recognised part of Member State social partner structures, have the capacity to negotiate agreements and be representative of several Member States; and (c) have adequate structures to ensure their effective participation in consultation processes and the work of the committees.

Based on regularly updated assessments of their representativeness, i.e. their compliance with the above criteria, the European Commission publishes a list of recognised European social partner organisations consulted under Art. 154 TFEU. At present, this list includes 86 organisations (of which 79 are sectoral organisations) which are divided into five groups: general cross-industry organisations (BusinessEurope, CEEP, ETUC), cross-industry organisations representing certain categories of workers or undertakings (Eurocadres, UEAPME, CEC), specific organisations (Eurochambres), sectoral organisations representing employers (62 organisations), and sectoral European trade union organisations (17 organisations) (10).

This list of recognised, representative European social partner organisations is adapted, with due respect for the autonomy of the social partners, whenever new social dialogue committees are set up and/or in the light of new evidence from updated representativeness studies which the European

(6) Commission Communication "Adapting and promoting the social dialogue at Community level", COM(98) 322, and Commission Decision on the establishment of Sectoral Dialogue Committees promoting the Dialogue between the social partners at European level, 98/500/EC, 20.05.1998; OJ L 225, 12.8.98, p 27; see annex 1.

(7) First, relate to specific sectors or categories and be organised at European level; second, consist of organisations which are themselves an integral and recognised part of Member States' social partner structures, have the capacity to negotiate agreements, and be representative of several Member States; and third, have adequate structures to ensure their effective participation in consultation processes and the work of the committees.

(8) See annex 2 for an overview of the establishment of sectoral social dialogue committees.

(9) Commission Communication concerning the application of the Agreement on Social Policy, COM(93) 600 final, 14.12.1993

(10) See annex 3 for the list of sectoral European social partner organisations consulted under Art. 154 TFEU. The full, regularly updated list is available under: http://ec.europa.eu/social/main.jsp?catId=522&langId=en

Foundation for the Improvement of Living and Working Conditions (Eurofound) is carrying out at the request of the Commission ([11]). Regular updates of the representativeness studies are made to ensure the representativeness of the organisations following EU enlargements; to reflect changes in the structure and membership of social partner organisations; to involve all relevant organisations, including new economic actors, small and medium-sized enterprises and/or the self-employed where relevant; and to take account of sectoral developments and structural changes which affect economic activities and employment structures.

This practice of updating the representativeness of the social partners is important to the development of European social dialogue, and the established social partners in many SSDCs have responded to the opportunity and challenge of EU enlargement by working with their partners in new Member States and candidate countries to support them in building their capacity and contributing fully to the social dialogue process. Furthermore, increased attention will be necessary with regard to the involvement of new economic actors currently not represented in European social dialogue structures ([12]).

Employers' organisations

In the context of the social dialogue, employers' organisations, like their workers' equivalents, operate at various levels, from the local to the national, European and global levels. They function to represent the interests of their members to the public authorities and to seek agreements with the representative organisations of workers.

At the European level the cross-sectoral representatives of the European employers are BusinessEurope (former UNICE), which represents the interests of European business and industry, along with the European Association of Craft and Small- and Medium-Sized Enterprises (UEAPME) and the European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest (CEEP). At the sectoral level, employer organisations also represent each of these interest groups based on the structure and composition of enterprises in the particular industry. The representation of employers differs significantly across the various sectors, ranging from one recognised employer organisation in most sectors (e.g. commerce, construction, chemical industry, hospitals, etc.) to three or more employer organisations in sectors such as civil aviation, extractive industries, audiovisual services, banking or insurance. Some of these organisations may represent small groups of large, individual companies directly in sectors where large-scale enterprises tend to dominate (e.g. telecommunications, postal services), while others may be representative of more diverse groups of employers, including SMEs or even the self-employed. In any case, the most important point remains their social mandate from their affiliated organisations and their deep roots in the industry which ensure that they are representative of all employers.

Workers' organisations

The trade unions, as the organisations of workers, operate at workplace, local, national, regional and global levels, allowing European federations to both reflect the views of their affiliates upwards into European SSDCs and also take decisions back through their democratic structures to their membership.

At European level the recognised cross-industry trade union organisation is the European Trade Union Confederation (ETUC). Sectoral trade union organisations at European level work closely with ETUC and with the international organisations that operate in their sector. They also advise and work with national trade unions, particularly in relation to the European dimension and instances such as the emergence of European Works Councils. European trade union organisations tend to be more concentrated than their employer counterparts, and some European trade union organisations are active in several sectors and related social dialogue committees (UNI europa in 9 SSDCs; ETF in 6 SSDCs; EFFAT in 4 SSDCs; EFBWW, EMCEF, EPSU and ETUF each in 3 SSDCs) within which they cooperate with a variety of employer organisations. As with employer organisations, their embeddedness within a sector ensures the representativeness that gives them the authority to speak on behalf of the workforce.

European sectoral social dialogue in action

Functioning, capacity and visibility of sectoral social dialogue committees

On the practical side, the social partners decide on the rules of procedure of their committee, on its annual or rolling multi-annual work programme, and on the nature and implementation of the outcomes of their work, in accordance with the typology proposed by the European Commission ([13]). The European Commission provides logistic and administrative support to the functioning of the committee, including the organisation of its meetings (in plenary, working group or steering group format), related interpretation and translation needs and the reimbursement of participation costs of social partner representatives. In 2009, it organised 185 SSDC meetings (51 plenary meetings, 118 working and steering group meetings, and 16 negotiation meetings) and processed more than 2 700 reimbursement requests for participation expenses related to these meetings ([14]).

Benefiting from the flexible support of the European Commission, SSDCs have developed forms of action to enable them to respond flexibly in relation to their own needs and the interests of their sectors. There are three main areas where they might seek to take action: firstly, in influencing their own members within the sector; secondly in ensuring that the sector's views are heard beyond the confines of the particular industry as well as in all policy areas, both through consultations and autonomous action; and thirdly, in negotiating agreements for implementation.

([11]) For further information, including full comparative and national representativeness studies and the underlying questionnaire, see in particular the website of the European Industrial Relations Observatory (EIRO): http://www.eurofound.europa.eu/eiro/comparative_index.htm
([12]) See annex 4 for an overview of past and ongoing representativeness studies.
([13]) See annex 5 for an overview of the categories of texts and outcomes of European social dialogue.
([14]) See annex 7 for an overview of the number of sectoral social dialogue committee meetings and related reimbursement requests in 2009.

The sectoral social partners and social dialogue committees are consulted by the Commission on all EU policy initiatives in the field of employment and social affairs, as well as on broad policy orientations and strategies, including the Lisbon Strategy, the Europe 2020 Strategy and the re-launch of the single market or financial market reform. Social partners, more generally, might comment at their own initiative on specific areas of policy, request specific information and presentations from the Commission services and make contributions to broader policy debates. Sectoral social dialogue committees are also increasingly consulted by the Commission in the context of its impact assessment procedures, in line with the Commission's impact assessment guidelines of January 2009. Social partners may make declarations or have opinions in relation to themes that cut across sectors, such as in relation to training and lifelong learning, trade liberalisation, sustainable development, climate change policy or EU enlargement.

Furthermore, the SSDCs can seek to adopt joint texts with a concrete impact for the workers and companies of the sector. These may take the form of guidelines, codes of conduct or frameworks of action that disseminate good practice and promote voluntary standards within the sector, while depending on the commitment, capacity and effort of the national social partner organisations for their effective implementation. They may also take the form of negotiated agreements to be implemented either in accordance with national procedures and practices - such as in the case of the multi-sectoral framework agreement on crystalline silica, signed by 18 social partners and industry organisations from 14 sectors ([15]) or the agreement of the social partners in personal services on the implementation of the European hairdressing certificates (2009) – or by Council directive, as in the cases of the framework agreements on working time in the railway sector (2004), the maritime labour conventions (2008), or risk prevention from the use of sharps in the hospitals and healthcare sector (2009) ([16]).

The SSDCs can initiate their own activities and commission analysis and research for their sector, including for example on the evolution of the sector, future skill needs and health and safety issues as well as surveys of good practices and policies, such as on equal opportunities, demographic ageing, teleworking, worker mobility and labour migration. In order to disseminate this information and encourage the development of best practices, the social partners can organise conferences and seminars, develop training packages, undertake awareness-raising campaigns or develop dedicated websites. Indeed, some sectoral social partners have produced dedicated websites in relation to their joint actions. Furthermore, a few sectors have set up specific social dialogue websites, thus increasing the visibility and awareness of their work ([17]). Some SSDCs have also agreed to develop special communication strategies as part of their joint work programme, so as to ensure higher visibility and hence better implementation of the outcomes of European social dialogue.

([15]) Agreement on Workers Health Protection through the Good Handling and Use of Crystalline Silica and Products containing it, http://www.nepsi.eu/agreement.aspx

([16]) See Annexes 5 and 6 for further information.

([17]) Sectoral social dialogue committees with their own websites include: the postal services (http://www.postsocialdialog.org), the sugar industry (http://www.eurosugar.org), the extractive industries (http://www.mining-dialogue.eu) and the gas sector (http://www.epsu.org/r/98).

The Commission provides financial support to social partner projects under specific budget lines ([18]). Such projects consist of a large variety of activities, including the organisation of capacity-building, training and awareness-raising events, conferences and seminars, surveys and studies, and the production of practical tools, such as joint websites (e.g. on the posting of workers in the construction sector), joint reporting standards (e.g. on social and environmental reporting in the tanning and leather sector), studies and best practices on training and lifelong learning (e.g. for technicians in the live performance sector and for workers in the ground handling sector in civil aviation), handbooks on risk prevention and health and safety (e.g. on accident prevention of seafarers and fishermen or with regard to mental well-being in the telecommunications sector), and social considerations in public procurement (e.g. in the catering sector).

The flexibility of their forms of action allows SSDCs to develop initiatives in accordance with the needs of their sector and reflecting the interests of national social partners, encouraging the social partners to agree on actions that they are committed to implement at the national and company level.

Sufficient capacity of the social partner organisations at European and national level, as well as strong interaction between the two levels are preconditions for productive social dialogue at European level and for effective implementation of its outcomes at national, local and company level. The Commission therefore regularly assesses participation in SSDC meetings. A recent analysis of the participation records in European SSDC meetings for the years 2003-2008 has shown in particular that the involvement of social partners from the new Member States varies strongly across the sectors. It has further shown that the participation of employer and employee representatives is rather unbalanced in some SSDCs, and it has also highlighted comparatively low participation levels of women in some committees. Finally, the analysis has shown that, although there are no general participation trends in European sectoral social dialogue, the participation is in general highest when the work programme integrates topics of direct relevance to the national social partners, either at the initiative of the social partners or due to the direct relevance of the EU policy agenda to the sector. For further details on participation rates in SSDCs by gender, Member State and sector of industry, see annex 7.

Topics, outcomes and achievements

Among the key features of European sectoral social dialogue are its diversity and its capacity to address sector-specific issues. These are well reflected in the large variety of topics included in the work programmes of the European SSDCs ([19]), which in turn also account for the high degree of diversity of outcomes across SSDCs. A complete description of the thematic work of the various SSDCs and a summary of their current work programmes is contained in the sector notes in part II of this brochure.

([18]) Budget lines for social dialogue and industrial relations, for information and training measures for workers' organisations, and for information, consultation and participation of representatives of undertakings. For further information, see: http://ec.europa.eu/social/main.jsp?catId=329&langId=en&furtherCalls=yes&callType=2

([19]) See annex 8 for a detailed overview of the topics included in the work programmes of the European sectoral social dialogue committees.

Introduction

At the same time, however, common themes are emerging across the sectors, including: training and lifelong learning; restructuring and future skill needs; working conditions and the image of the sector; sustainable development, corporate social responsibility, social and environmental reporting and supply-chain management; socially responsible public procurement; demographic ageing and diversity management; and equal opportunities.

This section briefly reviews the main topics addressed in sectoral social dialogue at European level as well as the key outcomes and achievements. It builds extensively on the report by the European Foundation for the Improvement of Living and Working Conditions on the dynamics of European sectoral social dialogue ([20]) which includes a detailed quantitative analysis for the period 1999-2007 of the 'plethora of documents unevenly spread over the years but growing in number' on European sectoral social dialogue. More detail on the thematic outputs of social dialogue at European level in 2008-2010, and notably on its contribution to addressing the current economic and financial crisis, will also be presented in the Industrial Relations in Europe 2010 report ([21]).

Among the most prominent topics on the agendas of European SSDCs are: first, **economic and sectoral policies**, including anticipation of and adaptation to change, restructuring, sectoral developments and structural change, and sectoral impacts of EU policies; second, **skills, training and lifelong learning**, with a focus on skills upgrading and future skill needs, training schemes for specific professions, job profiles and recognition of qualifications, lifelong learning and career paths, recruitment practices and youth employment; third, **employment and working conditions**, including questions of flexicurity policies, flexible working practices, recruitment and image of the sector as well as, increasingly, precarious work, bogus self-employment, migrant workers, undeclared work and other decent work issues; fourth, **health and safety at the workplace**, covering a wide range of issues including accident and risk prevention, ergonomics, musculoskeletal disorders, use and handling of chemical and cosmetic products, stress, noise, third-party violence, obesity, food hygiene, smoking, drugs and alcohol and other general health policy issues; and fifth, **equal opportunities, diversity management and non-discrimination**, including equal treatment, equality plans at the workplace, gender pay gap, gender portrayal and positive discrimination in recruitment policies.

In particular the development of the so-called Copenhagen-Maastricht-Helsinki process on **education, training and lifelong learning**, including the development of a European Qualification Framework (EGF), qualification and skills passports and common classifications for education and vocational training outcomes, has gained in importance as a topic at European sectoral level. Training and related issues are on the agenda of more than half of all European sectoral social dialogue committees, often linked with other issues such as demographic and technological change, job quality and the image of the sector.

([20]) http://www.eurofound.europa.eu/publications/htmlfiles/ef0898.htm
([21]) For the full report, see: http://ec.europa.eu/social/main.jsp?catId=575&langId=en

Issues related to **enlargement and the integration of new actors** have also remained high on the agenda of most committees, in particular in relation to capacity-building projects for new Member States and candidate countries carried out in some sectors (including textiles and clothing, and the chemical industry), although further efforts seem warranted to assess and enhance the effective impact in terms of participation of representatives from the new Member States and reinforcing social dialogue at local and company level in the new Member States. A project by ITC-ILO, in cooperation with ETUC, is currently assessing the evolution and implementation of European sectoral social dialogue in the new Member States and candidate countries, with a focus on achievements and challenges in postal services, telecommunications, construction and tourism as well as the chemical, energy, metal and textile industries.

Moreover, an increasing number of SSDCs have addressed the **economic and financial crisis** in their work, and several committees have produced joint statements on this issue. As a result, agreements were reached on joint statements and declarations in the commerce, regional and local government, live performance, chemical industry, road transport, construction, woodworking and furniture SSDCs, each addressing the crisis and measures to mitigate its effects and taking account of the specificities of the sectors. The social partners in the inland navigation sector highlighted the challenges faced by the sector in the context of the economic and financial crisis in their joint contribution to the Commission's consultation on the future of transport. Several committees are continuing their discussions on the consequences of the economic and financial crisis and measures needed to ensure a sustainable exit from it. A number of projects have also been carried out by the social partners in various Member States and sectors with a view to developing strategies to address the crisis and its social and employment consequences and prepare the exit towards a new period of sustainable growth and development.

On the other hand, **working time** has been a rather marginal topic in the recent years, with negotiations ongoing in the inland waterways sector only, but it may gain in importance again in view of the announced revision of the Working Time Directive. Only a few sectors have so far addressed issues related to **social security and social protection**, including in particular pensions and the coordination of social security for mobile and migrant workers.

While **corporate social responsibility** is mainly addressed by those committees that had previously adopted guides, codes of conduct or charters as part of the follow-up work, an increasing number of committees are dealing with questions of **sustainable development**, including climate change and energy policies, the EU Emission Trading Scheme (ETS), EU trade policy, international competitiveness and global social standards, and social and environmental reporting. Some committees have also continued to work on **socially responsible public procurement**, mainly by contributing to the ongoing work on a Commission guide on social considerations in public procurement.

With regard to the nature of outcomes of European sectoral social dialogue, the past few years have shown that the European sectoral social partners are increasingly making use of the space for autonomous action and negotiation provided for by the EU Treaties. Examples include in particular the framework agreements on the maritime labour convention (2008) and on preventing injuries from the use of sharps in the hospitals and health care sector (2009), the multi-sectoral agreement on crystalline silica (2006) and the autonomous agreement on the implementation of European hairdressing certificates in the personal services sector (2009) ([22]).

New developments

Improved involvement of social partners and social dialogue committees in the Commission's impact assessment procedure

The European social partners are increasingly involved in the European decision-making process. Under Article 154 TFEU, European social partners are consulted by the Commission on the principle and on the content of any European social initiative in the field of employment and social policy. In recent years, the frequency and number of these formal consultations have increased. Moreover, the European social partners are consulted by other Commission services dealing with sectoral policies (such as trade, internal market, education, industrial or transport policies). The Commission is committed to promoting impact analysis of all its policies and it therefore consults the European social partners, where relevant, in the context of impact assessments for new Commission initiatives.

The annex to the revised Impact Assessment Guidelines ([23]) contains a specific section on standards for consulting social partners (p. 15, point 5.2). It makes a distinction between initiatives in the field of social policy on the one hand and social implications for a specific sector on the other. The revised guidelines clarify the need for consultation of existing European SSDCs in the event of expected social implications for the concerned sector:

> *Commission Decision 98/500/EC stipulates that each sectoral social dialogue committee, for the sector of activity for which it is established, "shall be consulted on developments at Community level having social implications". You should therefore verify whether your initiatives will create social implications for a sector for which a sectoral social dialogue committee exists. If this is the case a consultation of the committee has to be organised with the assistance of the Unit "Social Dialogue and Industrial Relations" in DG EMPL.*

EU social partners have welcomed the clarification in the revised guidelines regarding the need for timely and systematic information and consultation of SSDCs in case of expected social implications at sectoral level.

Consultation of SSDCs is complementary to other forms of consultation, notably public consultations, and it differs from wider consultation of other actors of civil society in that social partners engaged in SSDCs are recognised by the Commission as representative actors of the sector concerned. A consultation of an SSDC on an impact assessment generally includes definition of the underlying problem, the relevant policy options and, further on in the process, the estimated social and employment impacts of the various options and any relevant accompanying mitigating policy measures.

A possible joint position of the committee on the impact assessment can give a strong and representative indication about realistic policies and their impacts and implementation. It can improve policy-making and facilitate the communication of decisions. Addressing requests to the relevant committees has the double advantage of, on the one hand, obtaining a formal and representative view based on the existing social dialogue structures and, on the other, contributing to the development and policy relevance of European social dialogue at sectoral level.

The consultation of SSDCs in the context of impact assessments is organised on the basis of their existing work programmes and meeting planning, in cooperation with the "Social Dialogue and Industrial Relations" Unit of DG EMPL and the other Commission services involved. The policy services responsible for the impact assessments take due account of the opinions expressed by the European social dialogue committees in the context of their consultation. To allow transparent and efficient consultation, the Commission publishes a list of all planned impact assessments along with its work programme.

Establishment of European sector councils for skills and jobs, and their relations with European sectoral social dialogue committees

In its Communications of December 2008 ([24]) and June 2009 ([25]), the Commission announced the possibility of setting up European sector councils on jobs and skills. During 2009, the Commission consulted stakeholders on this idea, in particular EU sectoral social partners, during SSDCs, at Liaison Forum meetings and during a Restructuring Forum dedicated to skills anticipation at sectoral level on 7 and 8 December 2009 ([26]). Social partners welcomed the idea of reinforced cooperation and exchange of information in the field of skills anticipation. To assess the feasibility of establishing EU sector councils, the Commission carried out a feasibility study, including a survey of and interviews with key stakeholders. Results from this study recommend the creation of sector skills councils under certain conditions. In its report ([27]), the expert group on New Skills for New Jobs (NSNJ) also recommended the creation of EU sector councils to analyse skill needs and the development of proposals for updated qualifications in each sector. This initiative also has the support of the Consultative Commission on Industrial Change from the European Economic and Social Committee ([28]).

([22]) See annex 6 for an overview of European sectoral and multi-sectoral agreements.
([23]) http://ec.europa.eu/governance/impact/commission_guidelines/commission_guidelines_en.htm

([24]) COM(2008) 868 final: New Skills for New Jobs – Anticipating and matching labour market and skills needs.
([25]) COM(2009) 257 final: A Shared Commitment for Employment.
([26]) http://ec.europa.eu/social/main.jsp?catId=88&langId=en&eventsId=209&furtherEvents=yes
([27]) New Skills for New Jobs: Action Now http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=697&furtherNews=yes
([28]) Exploratory opinion CCMI/68 adopted the 17/02/2010 on Matching skills to the needs of industry and evolving services – possible introduction of sector-based employment-skills councils at European level.

Companies and workers of a given sector are faced with common challenges across the Union. This applies to skill anticipation and matching of skills with labour market requirements. There is however little or no exchange of information between parties monitoring the development of these issues at national level. The Commission therefore has proposed to offer a platform at sectoral level for social partners and national observatories on skills and employment to share information, best practices and provide recommendations on quantitative and qualitative trends of employment and skills needs in the sector concerned as well as on other issues related to qualifications and competences. It invites the sectoral social partners to take the lead and create, on a voluntary basis, a European sector council for their sector. The European Commission would provide the framework and financial support for European sectoral social partners to set up these councils, subject to an evaluation of the councils in terms of output, commitment, satisfaction and added value.

European sector councils are expected to take the form of networks linking national observatories on skills and employment with the European sectoral social partners who will chair the council of their sector and be responsible for its day-to-day management.

The Commission proposes the establishment of sector councils in two phases: a first phase dedicated to the identification of existing national observatories and councils for jobs and skills and a second phase consisting of the creation of the sector council itself, bringing together these bodies in a network. The first and second phases of the process can be launched in 2010 and 2011 for a limited number of pilot sectors. The Commission also envisages the possibility of creating a transversal council to allow for exchanges between sector councils.

Technical note

This brochure contains specific notes for each of the SSDCs in place in 2009. It does not yet include notes for the new committees launched in 2010 for the metal industry, the paper industry and the education sector.

For each sector, the related note included in this publication contains: an introduction describing the main challenges and perspectives of the sector; a descriptive section on key issues, recent outcomes and the current work programme of the SSDC; and an overview table with summary information on: the sector demarcation; key characteristics and employment statistics of the sector; the European social partners in the sector and their representativeness; and a list of main achievements and key outcomes of social dialogue in the sector up to December 2009. These key outcomes can also be found in the dedicated text database on the European Commission's Social Dialogue website (29).

In accordance with the typology suggested by the Commission in 2004, social dialogue outcomes are classified in the following way: (a) agreements; (b) process-oriented texts, including frameworks of action, guidelines, codes of conduct, and general policy orientations; (c) joint opinions or declarations, and other tools; (d) procedural texts such as rules of procedures and work programmes; and (e) follow-up reports related to the implementation and monitoring of the results of social dialogue (30). In the sectoral notes, the following icons are included in the tables to indicate the respective text category.


Agreement


Process oriented text (framework of actions, guidelines, code of conduct), follow-up report


Joint opinion, declaration, tool

Sector demarcations are made with the help of the so-called NACE codes which are described in more detail in Annex 9. They are also instrumental to the representativeness studies through which the European Commission regularly assesses that the social partners involved in European social dialogue are representative of the employers and workers in the sector.[31]

According to the 1998 Commission Decision on the establishment of European sectoral social dialogue committees, such committees are established in those sectors where the social partners make a joint request to take part in a dialogue at European level, and where the organisations representing both sides of industry fulfil the following 'representativeness criteria': (a) they relate to specific sectors or categories and are organised at European level; (b) they consist of organisations which are themselves an integral and recognised part of Member States' social partner structures, have the capacity to negotiate agreements, and are representative of several Member States; (c) they have adequate structures to ensure their effective participation in consultation processes and the work of the committees.

The most recent representativeness study for each sector, together with additional information on the respective SSDC, its rules of procedure and its work programme, is available on the Sectoral Social Dialogue website (32).

Summary employment statistics by economic sector (NACE-2), including breakdowns by gender, educational outcome, employment status, working time and contract type are presented in annex 11. Unless indicated otherwise, employment data in this publication refer to the year 2008 (annual averages) and are based on Eurostat Labour Force Survey data. Structural statistics in the Sectoral Notes are indicative only and may refer to earlier survey years where more recent data are not available.

Earlier editions of this brochure on recent developments in European sectoral social dialogue were issued in 2002 and 2006 and are available as printed copies upon request.

(29) http://ec.europa.eu/socialdialogue; http://ec.europa.eu/social/main.jsp?catId=521&langId=en

(30) See annex 5 for more detail on the typology.

(31) See annexes 9 and 10 for the NACE codes used for the demarcation of the sectors currently engaged in social dialogue at European level.

(32) http://ec.europa.eu/social/main.jsp?catId=480&langId=en

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Part II:
Sectoral notes

Challenges and perspectives

Agriculture which comprises crop and animal production, forestry and logging, and fishing and aquaculture, makes a valuable contribution not only to the socio-economic development of rural areas and the full realisation of their growth potential, but also to the EU's prosperity overall. In 2007, the EU's agricultural industry output was equal to EUR 356 billion, or 1.2% of GDP. The related agro-food industry (manufacture of food, beverages and tobacco products) accounts for almost 15% of total EU manufacturing output and employs more than 5 million people.

The global financial crisis has contributed to the fall in price of many agricultural commodities and is expected to weigh heavily over the short-term perspectives of the agricultural sector in the EU. While it is generally more resilient to economic crises than other sectors, it is expected to face great challenges, especially in demand growth and farm income.

Becoming more market-oriented and sustainable is a major test for the European agricultural sector. As such, the Common Agricultural Policy (CAP) has been undergoing reform since the early 1990s. These reforms have focussed mainly on increasing the competitiveness of agriculture by severing the link between subsidies and production, and forcing farmers to be more competitive and market-oriented. More money will be made available to farmers for environmental, quality or animal welfare programmes by reducing direct payments to bigger farms.

Trade liberalisation discussions in the framework of the WTO's Doha Development Agenda have a direct impact on this sector and further restructuring is expected, including a reduction in aid and an opening up of world markets.

Climate change is a major concern for the agricultural sector. Decreasing annual and seasonal rainfall is threatening agricultural livelihoods across the EU, particularly in southern and south-eastern regions. Moreover, droughts, heat waves, storms and floods can dramatically affect crop yields. The EU is taking steps to limit agriculture's impact on climate change through modernisation, training and support for biogas. Together these measures have contributed to a decrease in farms' greenhouse gas emissions, particularly methane and nitrous oxide.

European social dialogue: key issues, recent outcomes and current work programme

While the social partners had signed several agreements (with regard to the organisation of working time) between 1978 and 1997 in the context of the joint committee, European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including health and safety, restructuring and enlargement, and training and lifelong learning.

Health and safety

In November 2005, EFFAT and GEOPA-COPA signed a European Agreement on the reduction of workers' exposure to the risk of work-related musculo-skeletal disorders (MSD) in agriculture. Negotiated following the Commission's consultation of the social partners, the Framework aims to promote good practices and support national risk prevention policies. Musculo-skeletal disorders represent one of the most important problems of health in the workplace in Europe.

Restructuring and enlargement

The social partners have held several conferences and seminars focusing on restructuring and the development of social dialogue following enlargement. These meetings highlighted the factors leading to restructuring in their sector: technological progress, changes in consumer demand, modernisation of the CAP and trade liberalisation. A commitment was made to pursue work on issues such as vocational training, worker mobility and the improvement of the health and safety conditions of agriculture workers.

Training and lifelong learning

In 2000, EFFAT and GEOPA-COPA adopted a white paper on vocational training. In 2002, the social partners signed a European agreement on training in agriculture containing proposals for the involvement of the social partners in the organisation of vocational training and the validation of skills. The agreement includes proposals such as the drawing up of 'skills assessments' by employees and the recognition of skills and experience 'in the field' as well as the harmonisation of qualifications to facilitate greater mobility. This agreement led to the launch of the AGRIPASS project.

Current work programme

In addition to the ongoing negotiations on musculo-skeletal disorders and the activities linked to the agreement on vocational training, the social partners are currently discussing whether to participate in the Occupational Safety and Health Administration (OSHA) campaign of risk assessment, the prevention of lethal accidents at work, CAP reform, employment consequences and capacity building in the new Member States. The follow-up of the 2002 agreement on vocational training depends on the completion of the AGRIPASS project and will be done after this. The final evaluation of the 2005 Health and Safety agreement will take place in 2010.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 01 (mainly equivalent to NACE rev.1.1 class 01) most closely covers the sector, including the growing of crops, fruit and vegetables, the raising of animals, landscape gardening, hunting and related agricultural and animal husbandry service activities, and excluding forestry and logging and related activities, fishing and fish farming and veterinary activities.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
Agriculture employs some 12.2 million people in the EU, in more than 7.3 million agricultural undertakings (2007). The majority of these agricultural workers (66%) are self-employed, with an important share (16%) being family workers, of which more than a third (36%) pursue another gainful activity in parallel. Only around a quarter of those employed in agriculture have employee status with full-time work dominating (78%). Women make up some 40% of the total agriculture workforce and account for a third of total working time. More than 90% of the workforce has a low or intermediate education level. Employment in agriculture is characterised not only by a high proportion of self-employed people, but also by high numbers of seasonal and casual, often non-EU workers. Informal work carried, out by farmers' spouses and other family members, and illegal employment practices are also significant compared with other sectors. While the majority of enterprises are small-scale, the distribution of agricultural holdings tends to shift from smaller to larger size classes, and the number of agricultural holdings continues to decrease.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Federation of Food, Agriculture and Tourism Workers** (EFFAT) represents 128 national trade unions from 37 European countries and has more than 2.6 million members. EFFAT is a member of the European Trade Union Confederation, (ETUC), and is a regional organisation of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF).	• The **Employers' Group of Agricultural Organisations in the European Union/Confederation of Agricultural Organisations in the European Union** (GEOPA/COPA) represents 60 full members from the EU Member States and 36 partner organisations, including from countries such as Iceland, Norway, Switzerland and Turkey.
Representativeness studies for the European agricultural sector were conducted in 2001 by the European Commission in cooperation with the Université Catholique de Louvain, and in 2006 by Eurofound, in cooperation with the University of Vienna. These studies confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The social partners in agriculture played a pioneering role in the development of sectoral social dialogue. The first joint committee was set up in 1963 and an initial European common understanding on the length of working time in agriculture was signed in 1968. The Agriculture Sectoral Social Dialogue Committee was created in 1999 when the rules of procedure were adopted. It meets up to six times a year, in biannual plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Resolution to draw up an 'AGRIPASS CV'	2007
European agreement on the reduction of workers' exposure to the risk of work-related musculo-skeletal disorders in agriculture	2005
Joint declaration on health and safety	2005
Health and Safety in Agriculture – Best practices and Proposals for Action	2004
European agreement on vocational training in agriculture	2002

Challenges and perspectives

The progressive liberalisation of the audiovisual industries – which comprise private-sector televisual activities, artistic activities, journalism, music or radio broadcasting and film production - has led to an increasing division of labour across the value chain, particularly in the television sub-sector. A similar process has occurred within the field of radio broadcasting, with the growth of independent radio production companies and service providers. The initial expansion of the audiovisual sector has been followed by a process of rationalisation, with a handful of large players dominating the field in many countries.

The audiovisual industry faces various other challenges. In the public sector, there is a threat to licence fees and public funding, while in the commercial sector advertising revenue has collapsed and the number of work commissions has fallen, leading to financial instability. The digital age has brought with it various challenges, including how to provide content across numerous platforms and increased piracy of creative output.

Cultural issues are also of relevance in trade policy and related international negotiations. So far, the GATS agreement has allowed the EU to preserve the 'cultural exception', by allowing transmission quotas and subsidy systems geared towards achieving structural change.

Many workers from the audiovisual sector face irregular and unpredictable employment opportunities, atypical contractual relationships and lack of control over their working conditions. This means that safeguarding and enhancing a genuine professional status for cultural and media workers is vital to making a career viable. In the current climate, trends towards greater 'flexibility' and mobility, as well as the drop in public funding in most European Member States, are seen to threaten the livelihood of many cultural and media workers.

However, workers in the audiovisual sector have a recognised standard of competence which allows them to be mobile within the industry across the EU and beyond. Audiovisual workers are also usually highly skilled and are trained for the future requirements of the sector.

European social dialogue: key issues, recent outcomes and current work programme

The Audiovisual Sectoral Social Dialogue Committee has only recently been established. So far, it has focused on enlargement and how to improve social dialogue in the new Member States; health and safety at work; training as a tool for change; equal opportunities and diversity; as well as following up EU draft legislation and policies (such as the revision of the Working Time Directive and the Directive on Services in the internal market).

The Committee adopted its first text, a joint declaration on Social Dialogue as a tool to tackle changing environments, on 7 May 2006. The Committee also came to a joint position on the Green Paper on Labour Law on 16 April 2007.

In 2009 a new sub-working group on training started its work in two test categories: journalists and technicians. The objective is to identify the challenges and needs of media and entertainment workers in the sector and to develop joint activities.

Spotlight on the sector

SECTOR CLARIFICATION

NACE rev.2 classes 18, 58-60 and 63 (mainly equivalent to NACE rev.1.1 classes 22 and 92) most closely covers the sector, including printing and publishing activities; the reproduction of recorded media; motion pictures and video; radio and television programme production; distribution and broadcasting activities; recreational, cultural and sporting activities; and activities of news agencies.

INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS

In the EU, more than 2.3 million people are employed in publishing activities, video and television programme production, and programming, broadcasting and information service activities, and almost 1.2 million people in printing and media reproduction. Although a majority of those employed in the sector have employee status and are working full-time, alternative, atypical forms of work continue to gain in importance. Employment in the sector is relatively balanced between men and women, and more than 40% of the workforce has a high education level.

The audiovisual sector in the EU encompasses 13 600 TV and radio enterprises, 3 657 musical production enterprises and 40 100 entities in the film production and video sub sector (2000), although there is some domination by conglomerate organisations.

SOCIAL PARTNERS

WORKERS' REPRESENTATIVES

- The **Media and Entertainment International-Technical Professions of the Entertainment Sector (EURO-MEI)** is part of UNI global union which represents over 130 trade unions, with a total membership of 250 000 workers and 14 service sectors.
- The **European group of the International Federation of Actors (EuroFIA)** represents trade unions in the EU (with the exception of Lithuania and Malta) as well as in EFTA countries. It is part of the International Federation of Actors (FIA), which represents more than 100 unions, guilds and associations, in more than 75 countries.
- The **International Federation of Musicians (FIM)** represents 24 member organisations in the EU and 72 throughout the world, and has close working relations within the framework of the International Arts and Entertainment Alliance (IAEA).
- The **European Federation of Journalists (EFJ)** represents 37 organisations in the EU and is part of the International Federation of Journalists (IFJ), which represents around 280 000 journalists in over 30 countries.

In the audiovisual sector, the four organisations jointly represent around 326 000 workers in the EU. UNI-MEI acts as the employees' secretariat.

EMPLOYERS' REPRESENTATIVES

- The **European Union of Broadcasters (EBU)** has 72 members in 52 countries.
- The **European Coordination of Independent Producers (CEPI)** represents the interests of independent cinema and television producers in Europe, covering approximately 4 000 cinema and television producers.
- The **Association of Commercial Television (ACT)** represents the interests of the commercial (private) television sector with 22 member companies active in 19 European countries.
- The **Association of European Radios (AER)** represents the interests of over 4 500 private/commercial radio stations in 11 EU Member States, as well as Switzerland.
- **The International Federation of Film Producers Association (FIAPF)** has member associations in each EU Member State.

The five organisations together represent the interests of about 12 325 audiovisual enterprises in the EU. The EBU acts as the employers' secretariat.

A **representativeness study** for the audiovisual services sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2004 and confirmed the representativeness of the above organisations for the sector.

SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES

The Audiovisual Social Dialogue Committee was created in 2004, when the rules of procedure were also adopted. It meets up to six times a year, in biannual plenary meetings and dedicated working groups.

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint opinion on protecting creativity, innovation and jobs	2009
Joint position on the Green Paper on labour law	2007
Joint declaration on social dialogue as a tool to tackle changing environments	2006

Challenges and perspectives

The development of banking in Europe has been affected by the liberalisation of the sector, the third phase of the monetary union and the launch of the European single currency in 1999, as well as the introduction of telecommunications and information technology. Given these developments, further consolidation and mergers are likely.

Achieving an integrated market for banks and financial companies is a core component of the European policy in the area of financial services. The Financial Services Action Plan, adopted in 1999, lays out EU regulation policies and is based on the principles of mutual recognition that allows financial services operators legally established in one Member State, to establish and provide their services in other Member States without further authorisation. A White Paper published in 2005 underscored the fact that the completion of the single market for financial services is a part of the EU's future growth and jobs and for making the EU more competitive globally.

Currently the sector faces major challenges deriving from the financial crises such as de facto nationalisation of industry and image deterioration. The EU is taking action to limit the impact of the global financial crisis and contribute to a more adequate regulation of financial markets, based on the recommendations of the so-called Lamfalussy report on a New Financial Architecture to strengthen financial services supervision ([33]), including increased protection for bank depositors, making credit ratings more reliable, improving risk management in financial firms, reinforcing the supervision of banks and insurance companies, and promoting responsible lending practices. These actions are likely to have a significant impact on the banking sector, including on employment developments. Apart from these pressing developments, the banking sector has to deal with the question of skills shortages and demographic change.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including corporate social responsibility (CSR), integrating organisations from new Member States, and training and lifelong learning.

Corporate social responsibility

In May 2005, the social partners adopted a joint statement on CSR. The statement reiterated the commitments on lifelong learning and highlighted good practice to facilitate a work–life balance, such as flexible retirement, sabbatical leave, part-time work, parental leave facilities and the use of telework. Organisations were also encouraged to improve internal communications with staff and promote policies of diversity and equality. The importance of core labour standards in relation to areas such as job security, discipline and grievance handling were emphasised and members were encouraged to consult with representative organisations and agree upon procedures.

Integrating organisations from the new Member States and the candidate countries

The social partners debated questions relating to enlargement during a series of round-table discussions which took place from 2000 to 2003 in Hungary, the Czech Republic, Poland, Malta, Slovakia, Slovenia and Cyprus.

In 2005, a follow-up project brought together the social partners from Slovakia, the Czech Republic and Hungary with their counterparts from other Member States for twinning meetings.

In 2008, an additional project focusing on the capacity-building activities for the social partners from Hungary, Czech Republic and Slovakia was implemented. Two workshops focusing on EU social dialogue and the interaction between the national and EU level were organised.

Training and lifelong learning

Vocational training and lifelong learning has been a key element of the social dialogue, as the social partners consider that the sector relies on a well-trained workforce. This is vital both for the competitiveness of companies and for the employability of workers

The joint declaration of 2003 concentrates on the following key themes: defining different skills, validating competencies, providing information and support on principles, rights and responsibilities, and the mobilisation of resources for retraining.

The social partners encouraged their members to conclude agreements at the appropriate level with regard to education and training in the workplace and to allow these to take place during paid working time. They also recognise the need to promote equal opportunities for employees in relation to lifelong learning, particularly for atypical workers.

Current work programme

In the future, the social partners of the Banking sectoral social dialogue committee will deal with lifelong learning, questions related to enlargement and a changing legal framework in the sector (including changes related to financial crises). They will closely monitor and follow up relevant EU policy initiatives which may have a social impact on the sector.

([33]) For more detail, see:
http://ec.europa.eu/internal_market/finances/committees/index_en.htm

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 64 (mainly equivalent to NACE rev.1.1 class 65) most closely covers the sector and includes banks, credit institutions and financial service activities other than insurance and pension funds.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
In the EU, around 4.2 million people are working in the banking sector, in more than 6000 credit institutions. The large majority of them have employee status (97%), and full-time work is predominant (88%). Women account for just over half of the employed (53%). Some 45% of the workforce has a high level of education.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• **UNI europa, is part of UNI global union** which represents around 1 000 trade unions in 140 countries and 7 million workers in 330 European trade unions. As European trade union federation for services and communication it is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including the finance sector, for which it has a specific section. UNI europa finance has members in all EU countries. The number of affiliated workers in the banking sector amounts to some 800 000.	• **The Banking Committee for European Social Affairs European Banking Federation (FBE)** represents the interests of the European banking sector. Its members are estimated to employ over 2.3 million people. • The **European Saving Bank Group (ESBG)** represents the interests of savings and retail banks in the Member States, except in Belgium, Cyprus, Estonia, Ireland, Lithuania and Slovenia. ESBG also has members in Norway, and a Russian member as an observer. ESBG's members employ 691 000 people. All members of ESBG are members of the World Savings Banks' Institute. • The **European Association of Co-operative Banks (EACB)** has a membership base comprising cooperative banking groups from the Member States (except the Czech Republic, Estonia, Latvia, Malta, Slovakia and Slovenia) as well as and Switzerland. EACB's members represent an estimated 547 000 employees.
A **representativeness study** for the European banking sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2000 and confirmed the representativeness of the above organisations for the sector. A new updated study is planned for 2010.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
An informal working party was set up in 1990 and the Sectoral Social Dialogue Committee was established in 1999, when the rules of procedure were adopted. In 2009, the committee made efforts to re-launch its activities, after a de facto suspension of its work in 2007-2008. It generally meets three to four times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Analysis of the demographic change in the banking sector – best practices (attractiveness of the sector, policies of retention of older workers, staff competences)	2006
Joint statement on "Employment and social affairs in the European banking sector: some aspects related to CSR"	2005
Joint declaration on lifelong learning in the banking sector – guidelines	2003

CHEMICAL INDUSTRY

Challenges and perspectives

The chemical industry is the second biggest industrial sector in Europe. It is a high-tech industry underpinning numerous innovations and closely linked to new developments in fields such as bio- and nanotechnology. With almost EUR 600 billion in annual turnover, the EU is the leading chemical producing area in the world, with 29% of the world's production, followed by the USA, China and Japan. The EU has a very substantial trade surplus in chemicals with all main trading regions. While its global market share has been decreasing over recent years, the EU has been able to further increase its trade surplus in speciality and consumer chemicals with most of its main trading partners.

The sector is facing high demand growth in Asia, slow demand growth in Europe as well as a highly regulated environment in Europe. Adopted in 2006, the REACH Regulation created legally binding elements of registration, evaluation and authorisation of chemical substances. While ensuring a homogeneous regulatory regime in the internal market and improving environment, health and safety standards, REACH represents the main regulatory challenge of the sector. In addition, the new EU Climate Change and Energy package with the system of emission trading creates further challenges and obligations. As well as high production costs in Europe, the sector currently also faces rising costs of raw materials. As a consequence, relocation, restructuring and international competitiveness are permanent issues of social dialogue. Yet, the integrated nature of the chemicals industry and its very high capital intensity make the outsourcing and off-shoring of parts of the production process complex and difficult. While the EU chemicals industry is gradually installing more production capacities in the growing Asian market, short term relocation of production facilities is not a widespread phenomenon.

While chemical companies look to increase profitability by reducing production costs, they also need proximity to markets. They choose their location on the basis of availability of raw materials, energy and skilled labour as well as proximity to markets. Education and training therefore are a key concern to the sector, not only as cost factors, but also as key determinants for maintaining and further developing its competitiveness throughout the current financial and economic crisis.

The High Level Group on the Competitiveness of the European Chemicals Industry, set up in 2007, concluded its work in early 2009 by adopting 39 recommendations aimed at fostering the competitiveness of the European chemicals industry while contributing to sustainable development. The main recommendations revolve around three key areas: more innovation and research and strengthening networks and clusters; responsible use of natural resources and a level playing field for sourcing energy and feedstock; and the need for open world markets with fair competition. The new unified regulatory regimes and innovative approaches will invigorate the capacity and performance of the sector.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2004. The dialogue has covered a range of issues including skills and society needs, chemicals legislation and climate and energy policy. Social partner and industrial organisations in this sector are also parties to the first multi-sectoral agreement negotiated in the context of European social dialogue, i.e. the 2006 agreement on protecting workers against silica crystalline dusts.

Skills and society needs

Against the background of the fundamental changes that the chemical industry has brought about – from the clothes citizens wear and the homes they live in to the cars they drive - the social partners of the chemical industry sector analysed current and future skills and societal needs. On the basis of their dialogue they made recommendations for future discussions and actions by the social partners, national governments and the Commission.

EU chemicals legislation

The social partners closely follow and assist the implementation of the European REACH Regulation to promote a workable and efficient system as well as good administrative management in practice.

Climate and energy policy

The social partners of the chemical sector support the EU in its efforts to address climate change and the sector intends to be a key player with ambitious targets for a low carbon economy. Partners encouraged the use of emission trading as a primary instrument to achieve environmental aims and the recognition of the needs to address competitiveness impacts (carbon leakage), the harmonisation of allocations and special rules for small emitters. They worked for proportionate reduction efforts from all emission trading participants, for specific chemical solutions to save energy and for industrial and technological leadership.

Training and lifelong learning

In 2006, the social partners adopted a joint declaration on "Skills for chemical businesses", underlining the lack of skills facing the industry and stating the mutual interest of employers and employees to invest in them.

The need to maintain and further develop the sector's skill base, including through training measures during short time working periods, was also stressed in two joint declarations on the global economic crisis that the social partners adopted in 2009.

Multi-sectoral agreement on protecting workers from silica crystalline dusts

In the framework of the Community Strategy on Health and Safety 2002-2006, 13 social partner and industrial organisations in the sectors of glass, ceramics, aggregates, foundries, industrial minerals, raw materials, wool, mines, cement and concrete concluded in 2006 the first multi-sectoral agreement negotiated in the context of European social dialogue. This agreement aims at protecting workers against silica crystalline dusts through health protection at the workplace, reduction of the exposure to silica crystalline and better knowledge of silica crystalline effects. An innovative online reporting and data collection and validation tool has been developed, and a joint monitoring committee has been drawing up regular annual implementation reports since 2007.

Current work programme

The social partners of the chemical sector continue to work on their previous initiatives relating to education, qualification and training, as well as the REACH and EU ETS implementation.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 classes 20-22 (mainly equivalent to NACE rev.1.1 classes 24-25) most closely covers the sector, including petrochemicals and plastics, specialty and fine chemicals, pharmaceutical products and pharmaceutical preparations, and consumer and other chemicals.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The EU chemical industry employs almost 4 million people in more than 60 000 undertakings, most of them with an employee status (97%) and in full-time work (93%). A total of 33% of workers are women. Employment in the EU chemical industry is strongly concentrated in a few Member States, with 90% of all employment concentrated in eight Member States (Germany, France, Italy, UK, Belgium, Spain, Netherlands and Ireland). Employment in the sector has further decreased by around 2% per year over the last 10 years. There is a huge diversity of chemical applications and there are high skill requirements for employees in chemical businesses. Compared with the average industrial worker, the labour force employed in the chemical industry is more qualified, trained and better paid.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Mine, Chemical and Energy Workers' Union (EMCEF)**, represents 128 European trade unions in 35 countries, with more than 2.5 million members. It is a member of the European Trade Union Confederation (ETUC) and is part of the International Federation of Chemical, Energy, Mine and General Workers' Unions (ICEM).	• The **European Chemical Employers' Group (ECEG)** represents employers' organisations from 19 EU Member States [34] and Norway. ECEG works closely with the European Chemical Industry Council (CEFIC). The member organisations of ECEG represent companies that employ about 90% of the workers in the industry.
A **representativeness study** for the European chemical industry was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2005 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
Following informal arrangements, the Chemical Sectoral Social Dialogue Committee was formally set up in 2004 when the rules of procedure were also adopted. It generally meets four to five times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint declaration on the global economic crisis	2009
Joint declaration on training in short time working periods due to the economic crisis	2009
Joint statement on the European Union Emission Trading Scheme (EU ETS)	2008
Joint publication of good practices in involving employee representatives in national Responsible Care initiatives	2008
Joint lessons learned and recommendations on restructuring, managing change, competitiveness and employment in the EU Chemical Industry	2008
Multi-sectoral agreement on protecting workers against silica crystalline dusts	2006
Joint position on REACH: Safety and Workability	2006
Skills for Chemical Businesses Understanding Society Needs - skills, education and training	2006

(34) Austria, Belgium, Bulgaria, Czech Republic, Denmark, Estonia, Finland, Germany, Hungary, Italy, Latvia, Lithuania, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, UK

Challenges and perspectives

Over the last 20 years there has been a revolution in the economic and regulatory landscape of air transport in Europe. This is largely due to the creation of a single market for aviation in the EU in the 1990s. Air transport used to be a highly regulated industry, dominated by national flag carriers and state-owned airports. The single market removed all commercial restrictions for airlines flying within the EU, such as restrictions on routes, the number of flights and the setting of fares. Now all EU airlines can operate air services on any route within the EU.

The effect of aviation on climate change is still modest, but is growing fast. The European Commission has therefore proposed including greenhouse gas emissions from the aviation sector in the EU Emissions Trading Scheme. This should give airlines a permanent incentive to reduce their climate impact.

Air traffic control provides the infrastructure for the safe and efficient flow of air traffic. Air traffic management (ATM) has always been developed at national level, but such fragmentation has led to inefficiency. As part of the EU's aviation policy, the single European sky — an ambitious initiative to reform the architecture of European airspace to meet future safety and capacity needs — entered into force in 2004. Four years later, the Commission presented a second 'package' of proposals.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2000. The dialogue has covered a range of issues including training and lifelong learning, working time and health and safety.

Economic and sectoral policies

In 2001, the social partners adopted a joint opinion on the crisis in air transport following 11 September. They called upon the Councils of Transport and Finance Ministers to approve measures to provide assistance to the aviation sector to address both economic and social factors affecting the future of the industry.

In the field of ATM, the social partners closely followed the proposals to reform the European airspace. In 2006, they issued a report on the implications of the 'functional airspace blocks'. One year later, they adopted guidelines for consultation arrangements for functional airspace blocks and committed to assess progress made by their members in order to achieve the agreed goals on a yearly basis.

Training and lifelong learning

The social partners of the ground handling sector jointly organised a conference on best practices on training and qualifications in the sector in June 2008. The conference highlighted the evolution of the European ground handling sector and the link between training, safety and the quality of service. In May 2009, ACI Europe, AEA, IAHA and ETF signed a joint declaration on training and qualifications in the ground handling sector, which sets out a common understanding, examining joint initiatives deriving from the results of the study on good practice conducted on behalf of social partners in preparation of the conference.

Working time

On 22 March 2000, AEA, ERA, IACA, ECA and ETF concluded a European agreement on the organisation of working time of mobile workers in civil aviation. Under this agreement, the number of hours worked annually is not to exceed 2 000 (compared with 2 304 in the general Working Time Directive, from which aviation was excluded) and actual flying hours are limited to 900. Apart from the working-hours requirement, the agreement includes a number of clauses relating to leave and to the health and safety of cabin crew. On 27 November 2000, a European Directive (2000/79/EC), the provisions of which were to be transposed by 1 December 2003, broadened the scope of this agreement by giving it a Community legal dimension. In 2007, the signatory parties started the review of the provisions of their agreement.

Health and safety

Four of the social partners, AEA, ERA, ECA and ETF, jointly organised a conference in 2008 addressing the Workplace Health Promotion concept for air crew. The European social partners will continue to work together on the improvement of Workplace Health Promotion in carriers operating within the EU. They encourage their affiliates to engage in regular procedures of information and consultation of trade unions and staff representatives, including negotiation where possible, on promoting work health for air crew. The European social partners announced that they will, amongst other things, jointly identify and promote best practices on stress management for air crew and especially on the psychological stressors at work. In addition, they will focus on best practices to improve air crews' ability to manage their private and family time – e.g. through influence on rosters and flexible career development.

Current work programme

The following items are high on the sectoral social dialogue committee's agenda: training and qualifications in the ground handling sector, workplace health promotion (air crew), the anticipation and management of change linked to the single European sky (ATM), 'Just Culture', and external factors with social implications.

Spotlight on the sector

SECTOR CLARIFICATION

NACE rev.2 classes 51.1, 51.21 (mainly equivalent to NACE rev.1.1 classes 62.A and 62.2) and NACE rev.2 class 52.2 most closely cover the sector, including scheduled and non-scheduled passenger and freight air transport as well as relevant support activities, ground handling and air traffic management.

INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS

Civil aviation employs some 500 000 people in almost 3 500 enterprises in the EU and contributes more than EUR 120 billion to European GDP. The sector includes more than 130 scheduled airlines and a network of over 450 airports.

SOCIAL PARTNERS

WORKERS' REPRESENTATIVES

- The **European Cockpit Association (ECA)** represents 22 pilot associations covering some 34 000 pilots.
- The **European Transport Workers' Federation (ETF)** represents some 3 million workers, from all transport modes, in 39 European countries.

On 18 June 2009, the Air Traffic Controllers European Unions Coordination (ATCEUC) and the European Transport Workers' Federation (ETF) signed a cooperation agreement to set up the modalities of cooperation between the two workers' organisations in the context of social dialogue. ATCEUC and ETF mutually recognise each other as social partners in the ATM field and as organisations that represent air traffic controllers at European level. ATCEUC recognises ETF as the organisation that represents all other ATM personnel at European level.

EMPLOYERS' REPRESENTATIVES

- **ACI Europe**, the European section of Airports Council International, speaks for some 400 airports in 45 European countries. ACI Europe's members account for over 90% of commercial air traffic in Europe.
- **Association of European Airlines (AEA)** represents 30 airlines in 26 European countries.
- **European Regions Airline Association (ERA)** comprises over 230 companies and 67 regional airports and represents the interests of organisations involved in air transport in Europe's regions.
- The **International Air Carrier Association (IACA)** has a European section which includes 33 leisure airlines.
- The **Civil Air Navigation Services Organisation (CANSO)** represents the interests of the Air Navigation Service Providers worldwide. The European section of CANSO represents 28 European air navigation service providers.
- The **International Aviation Handlers' Association (IAHA)** brings together the world's major independent ground handling companies.

Representativeness studies for the European civil aviation sector were conducted in 2000 by the European Commission in cooperation with the Université Catholique de Louvain, and in 2008 by Eurofound, in cooperation with the University of Vienna.

SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES

A joint civil aviation committee was established in 1990. The Civil Aviation Social Dialogue Committee was established in 2000 and the internal rules of procedure were adopted in 2003. It meets up to eight times a year, in plenary meetings and dedicated working groups.

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:

Joint declaration on training and qualification in the ground handling sector	2009
Charter and Company guidelines on Just Culture	2009
Joint statement on Workplace Health Promotion for Air Crew	2008
Joint statement for the second Single European Sky package	2008
Joint statement on Just Culture	2007
Joint statement from the European conference on Functional Airspace Blocks	2007
Guidelines for Consultation arrangements for Functional Airspace Blocks	2007
ETF/CANSO Joint statement on Functional Airspace Block Developments	2007
ETF/CANSO Common Understanding on a Competence and Training Scheme for Air Traffic Safety Electronics Personnel (ATSEP)	2007
Report by the Social Dialogue Air Traffic Management Work Group on the Implications of Functional Airspace Blocks	2006
ETF/CANSO, Statement on the Community Air Traffic Controller Licence draft Directive	2005
ETF/ACI Europe, Joint statement on Quality, Safety and Training in the ground handling sector	2005
ETF/CANSO, Joint statement "Social partners: key players in the functional airspace blocks"	2004
ETF/CANSO Letter to the Commission – Single European Sky	2003

Challenges and perspectives

Increased internationalisation, concentration, hard discounters and low-cost labels, as well as deregulation in different countries on issues such as opening hours, land use and establishment size, have increased competitive pressures in the commerce sector. The sector experiences a high degree of technological innovation, such as the use of ICT in value chain management, self-scanning, RFID (radio frequency identification) and electronic commerce.

New skilled jobs are expected to be created in areas such as database management and marketing and traditional jobs for service workers are expected to be redefined. Whereas commerce still has large potential for the inclusion of disadvantaged groups in the labour market, demand for skills, vocational education and training is increasing.

Employment in the commerce sector has been growing faster than in the rest of the economy in the majority of Member States since the mid-1990s. Work organisation in commerce must be flexible, which creates both opportunities and challenges for workers and enterprises. The geographical location of work, working time, occupational and pay structures undergo constant change in the sector. Working conditions and pay vary across Member States and type of business, but are less favourable than in most other sectors. There is a relatively high staff turnover. Gender equality with regards to the above average gender pay gap and to working conditions is important in the sector, not least due to the relatively high share of female workers.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1998. The dialogue has covered a range of issues including training and life-long learning, safe shopping and corporate social responsibility.

Training and life-long learning

In 2004, UNI europa Commerce and EuroCommerce joined the EuCoCo project (former BEQUAWE supported by the EU Leonardo project). They have jointly translated and disseminated this practical, electronic learning scheme for vocational schools, companies and self-learning.

Safe shopping and working environment

In 1995, the social partners issued a joint opinion on combating violence in commerce through risk identification, reduction and dealing with after-effects. The issue was taken up again in a declaration on promoting a safer working and shopping environment which has been followed-up by a joint project for the development of a practical tool for the prevention and handling of third party violence and abusive behaviour ("stop it").

Disability

In 2004, guidelines were adopted promoting the employment and integration of disabled people in the sector. They called on affiliated employers' organisations and trade unions to set up a disability management strategy, including staff training and disability awareness raising measures, an enabling working environment, recruitment procedures encouraging applications from disabled people, career development policies, retention, retraining and redeployment of employees who become disabled, the involvement of disabled people in training and work experience schemes and the involvement of disabled workers and organisations representing disabled persons in implementing a company agenda on employment.

Corporate social responsibility

The joint policy orientations on Corporate Social Responsibility (CSR) of 2003 call on members to promote high standards throughout business activities, to raise awareness about CSR among European enterprises and their workers, to develop social dialogue at European, national and company levels on issues relating to CSR and to disseminate good CSR practices. The social partners reiterated the validity of their guidelines supporting age diversity (2002), the declaration on combating racism and xenophobia (2000), the code of conduct on fundamental rights and principles at work (1999), and on combating child labour (1996), in which European commerce committed - among other things - to avoid dealing with products that are manufactured in violation of the International Labour Organisation's (ILO) core labour standards.

Integrating organisations from the new Member States and the candidate countries

The social partners in commerce have debated important questions relating to enlargement during a series of round tables in Estonia (1998), Hungary (1998), the Czech Republic (1999), Poland (1999), Lithuania and Slovakia (2000), Latvia (2002), Slovenia (2002), Romania (2005), Croatia (2007), Turkey (2008), and Poland (2009)

Current work programme

The commerce sectoral social dialogue committee is currently examining issues such as: adaptation to change; vocational training and forecasting skills needs; the economic crisis and its impact on the commerce labour market; joint reaction to Commission initiatives, in particular on the European retail market's functioning and working time; health, safety and well-being at the workplace, in particular as regards third-party violence and harassment; and the improved application of the social dialogue's results, which will include joint recommendations and newly developed measures and practices.

Spotlight on the sector

SECTOR CLARIFICATION

NACE rev.2 classes 45-47 (mainly equivalent to NACE rev.1.1 classes 50-52) most closely cover the sector, including retail and wholesale trade and repair and trade of motor vehicles.

INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS

Around 31.5 million people work in the retail (19.7) and wholesale (12.0) sector in the EU, which corresponds to almost 15% of all jobs. Commerce accounts for almost 10% of the EU's GDP (2007). 14% of workers in wholesale and 21% of retail workers have entrepreneur status. But the share of self-employment is falling. Part time work accounts for 10% in wholesale and 31% in retail. 53% of the workforce is female, but in retail women make up almost two thirds of the workforce. 85% of the workforce has a low or intermediate education level (57% intermediate).

The commerce sector is one of the sectors with the largest proportion of micro enterprises. In 2005, small firms (with less than 50 employees) employed 60% of commerce workers and firms with more than 250 employees employed 27.8%. However, while the share of employment in SMEs is decreasing, employment in large enterprises is increasing.

SOCIAL PARTNERS

WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• **UNI europa Commerce is a part of UNI global union** which represents around 1 000 trade unions in 140 countries and 7 million workers in 330 European trade unions. As the European trade union federation for services and communication it is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including commerce for which it has a specific section. UNI europa Commerce has at least one member in each EU country.	• **EuroCommerce** represents the employers' side within the committee. It has a membership of over 100 organisations, including commerce federations in 31 European countries, European and national associations representing specific branches of commerce and individual companies. EuroCommerce represents a large number of SMEs, but some corporate multinationals are also directly affiliated. With the exception of Bulgaria, EuroCommerce has at least one member in each EU country.

Representativeness studies for the European commerce sector were conducted in 1999 and 2003 by the European Commission in cooperation with the Université Catholique de Louvain and confirmed the representativeness of the above organisations for the sector.

SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES

The social partners have been working together in an informal working party since 1985 and the rules of procedure of the European sectoral social dialogue committee were adopted in 1998. It meets up to six times a year, in plenary meetings and dedicated working or steering groups.

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Preventing third-party violence in Commerce – A toolkit	2009
Economic crisis: joint reaction of the social partners for commerce – Joint opinion	2008
Letter of intent for BeQuaWe European Certified Training - Declaration	2006
Declaration: Promoting a safer working and shopping environment in European Commerce – Declaration	2006
Joint statement on the Draft Directive on Services in the Internal Market – Joint opinion	2005
Statement on promoting employment and integration of disabled people in the European commerce and distribution sector – Guidelines	2004
Joint statement on Corporate Social Responsibility – Policy orientations	2003

Challenges and perspectives

Construction is one of the biggest industrial sectors of the EU economy and has an important multiplier effect on other sectors, contributing to more than 10% of EU GDP. It is a labour-intensive sector and the value-added per person employed is significantly lower than in many other activities, mostly due to the limited potential for increased automation and capital intensity of production. Seasonality and fluctuation of demand have an important influence on the performance of construction, which in turn is influenced by the business cycle and country-specific support measures such as subsidies, credit or tax incentives for home-owners. Given its strong dependence on access to credit, the construction sector has been hit particularly hard by the current economic and financial crisis. To compensate for the downturn in residential housing construction activity and to mitigate its impact on other sectors of the economy, public recovery plans have in many cases included special measures and accelerated infrastructure investment in support of the construction sector.

In addition to Council Directive 89/106/EEC (Construction Products Directive – CPD), currently under revision, a great deal of Community legislation in other policy fields also has a bearing on the competitiveness and employment of the construction sector, i.e. technical harmonisation, public procurement, health and safety at the workplace, free movement of workers, recognition of qualifications, VAT rules, protection of the environment and of consumers. Construction activity also has an important impact on the environment, and the increased policy focus on energy efficiency, renewable energy, waste reduction and other sustainability issues provides a formidable challenge and opportunity for the sector.

At the international level, Europe is a net exporter of construction services, well ahead of the US and Japan, and the globalisation of construction activities is especially important for large civil engineering companies that are exporting management and planning concepts and managerial and engineering skills. However, the manual labour is generally performed by the local workforce. Consolidation is expected among the large construction companies, which would lead to the emergence of a few firms dealing with project management that might outsource building work to subcontractors (small or micro enterprises).

European social dialogue: key issues, recent outcomes and current work programme

The social partners of the European construction sector have been working together in an informal working group since 1992, and in the sectoral social dialogue committee for construction since 1999. Their work has covered a range of issues, including: health and safety and risk prevention; posting of workers; self-employment and bogus self-employment; and training and attractiveness of the sector.

Employment

The social partners have issued a number of joint declarations in support of the Directive of the European Parliament and of the Council of 16 December 1996 concerning the posting of workers in the framework of the provision of services and self-employed workers; the last one was signed in December 2007. The free movement of people within the EU has an important impact on this sector. In 2005, a common database was launched which has been updated in 2008 and in 2009. In 2008, FIEC and EFBWW signed a joined declaration on paritarian funds. In 2009 and in 2010, joint declarations on the global economic crisis have been signed, as well as joint conclusions and recommendations on self-employment and bogus self-employment (2010).

Health and safety

A technical guide to good practice on coordination in hygiene and safety in order to reduce the number of industrial accidents on construction sites was created in 2002, as well as a technical guide to good practice in coordinating health and safety for the use of small and medium-sized undertakings. The aim of this publication is to make all players in the sector, from technician to architect via site manager or subcontractor, aware of the basic rules to follow on construction sites. In April 2002 the social partners adopted joint recommendations for facilitating the implementation of Directive 2001/45 on working at heights, and a joint statement on the European Week for Safety and Health at Work: "Building in Safety" was issued in April 2004.

In April 2006, EFBWW and FIEC signed a joint recommendation on the prevention of work-related stress, in line with the framework agreement on work-related stress adopted by the European cross-industry social partners in October 2004. The follow-up of this joint paper will take place in the framework of the multi-annual working programme 2008–2011 of the sectoral social dialogue committee in the construction industry.

Training and lifelong learning

In 2004, FIEC and EFBWW published a brochure on mentoring with the aim of promoting integration, training and retention of young people in the sector, while preserving the skills of older workers. Currently they are working on projects to develop skills and qualification criteria in the construction sector.

Young people

In some EU countries, many young people are unemployed while, at the same time, the construction industry faces recruitment difficulties. In the context of the "Youth Pact", adopted by the March 2005 European Council, the construction social partners committed themselves to making specific efforts aimed at integrating younger people in the construction labour market.

Integrating organisations new Member States and candidate countries

Social partners have also engaged actively in promoting social dialogue in new Member States and candidate countries and in involving organisations from these countries in their work.

Current work programme

In accordance with their current work programme for 2008-2011, the social partners of the European construction sector are currently developing the following themes: health and safety, occupational diseases and industrial accidents, work related stress, the image of the sector, life-long learning, recognition of qualifications, energy efficiency, flexicurity, migration and cross-border mobility, and enlargement. They are also discussing the impact of the economic and financial crisis on the sector and have adopted related joint positions.

Spotlight on the sector

SECTOR CLASSIFICATION

NACE rev.2 41-43 (mainly equivalent to NACE rev.1.1 45) most closely covers the sector, including all forms of building and civil engineering activities as well as specialised construction activities such as demolition and site preparation and the renting of construction or demolition equipment to operators.

INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS

The construction sector is the biggest industrial employer in the European Union. With more than 18.5 million employed, and more than 14 million employees, it represents around 26% of industrial employment in the EU, or 7% of total employment - and more than 20% when taking into account the indirect jobs generated in other sectors of the economy. The majority of employed workers in the construction sector are low- and medium-skilled, while the share of high-skilled workers of around 10% is well below average. More than 90% of workers in the sector are men. Employment is often temporary, and there is a high prevalence of undeclared work.

Construction activity is primarily local, and the sector is characterised by a predominance of small and medium sized enterprises, and a very important number of micro enterprises and self-employed people. The sector is composed of around 2.5 million enterprises, 93% of which comprise less than 10 employees. Only 1% of the EU companies in the construction sector have more than 50 employees, but these companies undertake approximately 40% of the volume of construction work. These few large companies are, in a number of cases, parts of mixed activity organisations providing services, including the financing of construction activities, or are active in fields such as energy, transport, telecommunication and media.

WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Federation of Building and Woodworkers (EFBWW)** represents 75 affiliated trade unions in 31 countries with 2 350 000 members. EFBWW is a member organisation of the European Trade Union Confederation (ETUC).	• The **European Construction Industry Federation (FIEC)** represents the employers' side within the construction sectoral social dialogue committee. FIEC has member organisations in almost all EU Member States, as well as in Norway, Switzerland and Turkey. The European Builders Confederation (EBC) which represents small and medium size construction enterprises and has members in Belgium, Czech Republic, France, Hungary, Italy, Luxembourg, Poland, Romania, Slovenia, Spain and UK has observer status within the employers' delegation led by FIEC.

Representativeness studies for the European construction sector were conducted by the European Commission in cooperation with the Université Catholique de Louvain in 1999 and 2004 and confirmed the representativeness of the above organisations for the sector.

SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES

The sectoral social dialogue committee for the European construction sector was set up in 1999, although activities had been carried out within an informal working group since 1992. It meets up to eight times a year, in biannual plenary meetings and dedicated working groups.

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
The global economic crisis and its consequences for the European construction industry - Positive measures and concerns of the European Social Partners EFBWW and FIEC	2009
Joint declaration on paritarian funds	2008
Joint position on the European Commission's Communication on 'Posting of workers within the framework of the provisions of services: Maximising its benefits and potential while guaranteeing the protection of workers'	2007
Joint recommendation on the prevention of occupational stress in the construction sector	2006
Third joint statement of the European Construction Industry's Social Partners on the European Commission's Proposal for a Directive on Services in the Internal Market (COM(2004) 002)	2005
Joint statement on Young people	2005
Joint declaration on the occasion of the European Health & Safety Summit	2004
Second joint statement on the European Commission's proposal for a directive on services in the internal market	2004
Joint statement on the European Week for Safety and Health at Work 2004 'Building in Safety'	2004
Joint statement on the European Commission's proposal for a Directive on Services in the Internal Market	2004
Brochure on tutorship	2003
Joint declaration regarding the proposed Directive relating to entry and residence conditions for workers who are nationals of other countries	2003
Recommendations regarding implementation of the Directive on 'working at heights'	2003
Guide of best practices on the co-ordination of health and safety	2003

Challenges and perspectives

The catering industry covers contract catering and canteens. It consists of a firm or a collective organisation's outsourcing of their restaurant services to a specialised company, on a contractual basis.

The contract catering industry is working to reduce its environmental impact. Efforts made include reducing the amount of packaging used, sorting waste and recycling as much as possible and reducing CO_2 emissions from food transport.

The industry also acknowledges its role in promoting healthy eating and fighting obesity. Since 2005 the contract catering industry has actively participated in the EU Platform on Diet, Physical Activity and Health. The leading catering organisation, FERCO, has produced an annual report since 2006 outlining what the industry has done to tackle obesity.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2007. The dialogue has covered a range of issues including corporate social responsibility (CSR) and created the guide to the economically most advantageous offer. The sectoral social dialogue committee on contract catering is working on a training tool for food hygiene.

Corporate social responsibility

In January 2007 the social partners adopted policies on CSR that suggest areas for action, beyond legal requirements, with regard to equal opportunities and non-discrimination, working conditions and work organisation, fair pay, vocational training and lifelong learning, health and safety, restructuring and relationships between social partners. They also included provisions for regular follow-up action.

Guide to the economically most advantageous offers

EFFAT and FERCO have noted that a growing number of authorities, both private enterprises and public bodies, have adopted a policy of awarding contracts of catering services to the lowest priced tenderer. This policy is not in the interest of any of the parties concerned, neither the client authorities and their users, nor the contract catering companies and their employees.

In the light of this situation, FERCO and EFFAT have decided, in the framework of their European Social Dialogue, to jointly assist public and private purchasers of contract catering services in their efforts to organise competition between contract catering companies by drawing up a 'Guide to the economically most advantageous offer in contract catering', with the support of the European Commission.

This guide offers a range of contractual solutions and a standard structure showing what the specifications for contract catering should include. This enables potential clients to formulate their expectations and needs clearly and in a structured manner. Moreover, the guide presents tools for analysing the offers and selecting the company submitting the economically most advantageous offer.

The guide is intended to promote the use of quality criteria for awarding catering contracts by the clients, whether they are public organisations or private companies. FERCO and EFFAT believe that the choice by both public and private entities of the "economically most advantageous offer" can contribute to a higher level of nutritional balance and improved food hygiene and safety standards.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 56.29 (mainly equivalent to NACE rev.1.1 classes 55.51-55.52) most closely covers the sector, including canteens, catering and other food service activities.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The contract catering sector is strongly characterised by large enterprises. Today, around 30% of firms or collective organisations have a contract with a catering company. The sector is prospering; with a turnover of EUR 24 billion, contract catering employs some 600 000 people all over Europe and delivers around 6 billion meals each year. This represents 67 million consumers served every day, one in four meals taken outside the home, and more precisely one in every two meals taken at the workplace, more than one in four meals at school and more than one in 10 in the healthcare or social sectors.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Federation of Food, Agriculture and Tourism Workers (EFFAT)** represents 128 national trade unions from 37 European countries and has more than 2.6 million members. EFFAT is a member of the European Trade Union Confederation, (ETUC), and is a regional organisation of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF).	• The **European Federation of Contract Catering Organisations (FERCO)** represents its 10 members in Belgium, France, Germany, Italy, Hungary, Netherlands, Portugal, Spain, Sweden and UK.
A **representativeness study** for the European contract catering sector is currently being conducted by Eurofound in cooperation with the University of Vienna.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
Since 1998, EFFAT and FERCO have been working together, in the framework of an informal dialogue and with the support of the European Commission, on the design and implementation of effective annual action plans and ambitious projects. This dialogue reflects the specificities of a sector providing food management services. In 2007, this informal social dialogue was officially recognised by the Commission and the European Social Dialogue Committee for the Contract Catering Sector was established. The committee generally meets three to four times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint declaration on responsible awarding of contracts	2008
Common statement on Obesity	2007
Agreement on Corporate Social Responsibility	2007
Guide to the economically most advantageous offering in Contract Catering	2006

Challenges and perspectives

The restructuring which has occurred in the electricity sector since the second half of the 1990s has mainly been a consequence of EU liberalisation of network industries. The first steps towards restructuring were taken with the 1996 Directive, which came into effect in 1999. Further Directives were put into place giving deadlines for the full opening up of the market by 2007. This key legislation contains a number of obligations for national regulators and they must monitor the development of competition, levels of investment and, where appropriate, the price level. These changes have led to more transparency and have given operators more ability to predict change. The electricity sector remains in transition in many European regions, particularly in countries in which the liberalisation process (and in some cases also the privatisation process) is still ongoing.

The current challenges for the industry are varied. Work is underway to ensure the sector meets its obligations under the Third Energy Package and the Climate and Energy Package. The EU commitment to reduce greenhouse gases emissions by 20% will require major technological change and put pressure on workers with regard to skills needs.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2000. The dialogue has covered a range of issues including equal opportunities, corporate social responsibility (CSR), stress and restructuring.

Equal opportunities

Following the report on 'Equal Opportunities and Diversity: Changing Employment Patterns in the European Electric Industry' prepared by the Cardiff School of Social Science, the social partners drew up a toolkit for the companies on the issue. The toolkit focuses on the equality and diversity policies, practices and procedures as well as on importance of a supportive workplace. It also addresses the issue of work-life balance and flexible working hours. It provides users with practical checklists, templates and models.

Corporate social responsibility

In 2004, the social partners undertook to monitor current activities in the sector on CSR, with a focus on issues such as training and personal development, health and safety, equal opportunities, union representation and relationships with suppliers and customers, local communities and educational institutions. Currently, social partners are negotiating a new declaration on CSR.

Stress

In 2004, the social partners adopted a joint declaration on work-related stress, encouraging their affiliated member organisations to implement the cross-industry agreement on this issue. In 2007, the social partners published a new declaration based on a document from 2004 and presented the report on the implementation of the inter-professional level agreement and asking affiliates to implement the agreement at sector level. Activities concerning monitoring are envisaged.

Harassment and violence

In the declaration on harassment and violence, the electricity social partners call upon their affiliated member associations and organisations to implement the inter-professional agreement on harassment and violence before May 2010, in accordance with national procedures and practices. They also express their intention to monitor the implementation of the agreement in the electricity industry. An intermediate report was produced in December 2008, while another is scheduled for December 2009. A final report is foreseen for the June 2010 meeting, enabling decisions to be taken on any necessary further actions.

Health and safety

The policy statement on health, safety and training recognises the important contribution of education and training of management and workers to ensuring high standards of health and safety, and employees have a clear understanding of their duties and responsibilities for health and safety – both for themselves and others. The social partners describe some important characteristics of adequate and appropriate training and recommend that companies include training on health and safety into vocational (initial and continuous) training.

Restructuring

In December 2008, the social partners published a toolkit for socially responsible restructuring with a best practice guide. The toolkit underlines the importance of social dialogue in the successful restructuring process and describes ways to address the issues concerning social dialogue. It tackles complex questions of outsourcing and offshoring and emphasises the need for the process of anticipation and transparency. A large part of the toolkit is dedicated to questions of training, retraining and redeployment of employees. The toolkit includes a number of checklists and practical examples.

Demographic change

The toolkit on demographic change gives practical guidance and examples of good practices taken by electric companies to address demographic change. Its aim is to assist in developing comprehensive and practical approaches to workforce change in the industry in order to promote age diversity. The toolkit includes a section on age management tools covering: the recruitment and retention of older workers; health and well-being; attracting younger workers; flexible working time; exit and retirement policies; and the role of the social dialogue between employers and unions. A wide range of good practices and examples from European companies were included.

Current work programme

The electricity social partners are currently working on skill needs, the impact of demographic change, restructuring of the workforce and social aspects of CSR They also closely follow EU-level developments in the fields of the environment and energy, as these have social implications for the sector. Moreover, they actively support the implementation of the Memorandum on Social Issues in the context of the Energy Community for the Western Balkans.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 35.1 (mainly equivalent to NACE rev.1.1 class 40.1) most closely covers the sector, including the production, transmission, distribution and trade of electricity.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The electricity sector in the EU employs more than 800 000 people in the production and distribution of electricity. The large majority of the electricity workers have an employee status and full-time work is predominant. 78% of workers are men. 69% of the workforce has a low or intermediate education level. The size of enterprises varies widely between countries. One or a few large companies dominate in some countries, while in others, smaller companies play a more significant role.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Mine, Chemical and Energy Workers' Union (EMCEF)** represents 128 European trade unions in 35 countries, with more than 2.5 million members. It organises both blue- and white-collar workers. It is a member of the European Trade Union Confederation (ETUC) and is part of the International Federation of Chemical, Energy, Mine and General Workers' Unions (ICEM). EMCEF represents 300 000 trade union members in electricity. • The **European Federation of Public Service Unions (EPSU)** represents over 216 public sector unions covering approximately 8 million workers in more than 36 EU and candidate countries, as well as EFTA countries. EPSU enlarged its geographical scope in June 2009 to include trade unions from many EU Eastern neighbourhood countries including Armenia, the Central Asian Republics, Georgia, Moldova, Russia and Ukraine. EPSU represents 500 000 trade union members in the electricity and gas sectors. EPSU is a member of the European Trade Union Confederation (ETUC) and is the recognised European regional organisation of Public Services International (PSI).	• **EURELECTRIC** represents employers in the electricity industry and has members in all Member States and candidate countries, as well as in Iceland, Norway and Switzerland. EURELECTRIC represents electric companies employing 600 000 people.
Representativeness studies for the European electricity sector were conducted in 2001 and 2004 by the European Commission in cooperation with the Université Catholique de Louvain and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
An informal working party was established in 1995 and the electricity sectoral dialogue committee was established in 2000, when it adopted its internal rules of procedure. It generally meets four times a year, in biannual plenary meetings and dedicated working groups.	

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint position on the social aspects of corporate social responsibility	2009
Restructuring in the electricity industry toolkit	2008
Toolkit on management of demographic change	2008
Joint declaration on the social aspects of the European energy community (south east Europe) and the implementation of the Memorandum of understanding	2007
Joint declaration on stress	2007
Joint declaration on employment effects of the opening of electricity & gas markets (ECOTEC study)	2007
Joint declaration on harassment and violence	2007
Equal opportunities and diversity toolkit/best practices guide	2006
Health and safety and training – policy statement/guidelines	2006
Joint statement on south-east European energy community	2004
Joint declaration on work-related stress	2004
Joint statement on future skills needs	2004
Joint statement and final report on the study on lifelong learning	2003
Joint declaration on equal opportunities/diversity	2003

Challenges and perspectives

The extractive industry is active in many EU Member States, in particular Bulgaria, Finland, France, Germany, Greece, Poland, Portugal, Romania, Slovakia, Spain, Sweden and the UK. Rationalisation measures and a reduction of activity in the extractive industry in most producing countries have led to a significant reduction in jobs. Competition is strong from large-scale, high-grade overseas operations capable of producing under low-cost conditions. The EU extractive industry tries to compete by supplying high-quality materials.

The extractive industry covers both energy and non-energy raw materials. The mining and quarrying sector plays an important role in the industrial development of the EU, providing both jobs and added value to its economy.

In 2005 the non-energy extractive industry within the EU generated a turnover of about EUR 45 billion and provided some 295 000 jobs. Key policy areas for both the energy and non-energy parts of the industry include access to land, environmental protection, research and innovation, health and safety requirements and skills shortages.

A Commission Staff Working Document on the competitiveness of the EU non-energy extractive industry of 4 June 2007 analysed the availability of non-energy raw materials within the EU. It also examined the different drivers of a competitive extractive industry in Europe. As a second step, on 4 November 2008 the European Commission adopted a new integrated strategy which sets out targeted measures to secure and improve the access to raw materials for EU industry. The Commission will report to the Council on the implementation of the raw materials initiative.

Coal has a major share in European energy supplies; it accounts for around one third of the EU's electricity production. Some countries such as Poland, Greece and Germany rely significantly on coal generation. Coal is mined in significant amounts in nine Member States. To secure sustainable, competitive and secure energy supplies for Europe, the EU is currently aiming to significantly reduce carbon emissions from coal-fired power stations. Besides strict environmental legislation, investment and research in clean coal technologies – especially carbon capture and storage (CCS) – are seen as vital.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1952. The dialogue has covered a range of issues including in particular heath and safety, climate change action and energy policy. Many social partner and industrial organisations in this sector are also parties to the first multi-sectoral agreement negotiated in the context of European social dialogue, i.e. the 2006 agreement on protecting workers against silica crystalline dusts.

Climate package

Following the publication of the EU Climate and Energy Package ([35]), the social partners of the extractive industry sectoral social dialogue committee presented their views on the proposed solutions. The committee underlined the support for the EU as a competitive and environmentally friendly industrial location. They believe that sustainable policy for industry, energy and climate should provide real protection for the climate, foster industrial development and innovation, secure a long-term supply of environment- and climate-friendly energy and promote social progress.

However, they stated that an industrial society in which social, economic and environmental values were equally promoted was needed. The social dialogue committee also supported the setting of ambitious targets on climate protection, but these targets should be realistic and achievable, imposing comparable constraints on European and foreign partners. They asked for sustainable, internationally agreed targets on emission reduction and an emissions trading scheme. Furthermore, the criteria for the scheme should be set so as to guarantee that any international agreement does not distort competition or lead to carbon leakage at the expense of European industry.

Energy policy

In the position paper on energy policy, the social partners endorsed the efforts of the EU institutions in favour of a competitive European economy. They recommended that the European energy policy be based on an energy mix which contributed to security of energy supply and energy independence. In addition, they stressed that discussion on future energy policy should not only focus on climate change, but should also include social and economic aspects in Europe. The social partners expressed their belief that any significant decrease in the proportion of electricity from coal-fired power stations would push energy prices up and thus negatively influence the competitiveness of the European economy.

Multi-sectoral agreement on protecting workers from silica crystalline dusts

In the framework of the Community Strategy on Health and Safety 2002-2006, thirteen social partner and industrial organisations in the sectors of glass, ceramics, aggregates, foundries, industrial minerals, raw materials, glass wool, mines, cement and concrete concluded in 2006 the first multi-sectoral agreement negotiated in the context of European social dialogue. This agreement aims at protecting workers against silica crystalline dusts through health protection at the workplace, reduction of the exposure to silica crystalline and better knowledge of silica crystalline effects. An innovative online reporting and data collection and validation tool has been developed, and a joint monitoring committee has been drawing up regular annual implementation reports since 2007.

([35]) http://ec.europa.eu/environment/climat/climate_action.htm

Current work programme

Currently the sectoral social dialogue committee is working on health and safety guidelines, with a particular focus on young workers and contractors. The committee will also contribute to impact assessments by examining social impacts of the various policy options suggested in response to the expiry of the Regulation on State Aid to Coal and intends to monitor the impacts of the financial crisis on the sector.

Spotlight on the sector

SECTOR CLARIFICATION

NACE rev.2 classes 05 and 07-09 (mainly equivalent to NACE rev.1.1 classes 10 and 13-14) most closely covers the sector, including: mining of hard coal, lignite, iron and non-ferrous metal ores, and minerals; extraction of peat and salt; other mining and quarrying activities and support activities. It excludes the extraction of crude petroleum and natural gas.

INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS

The EU extractive industry sector covers some 19 000 enterprises employing more than 900 000 people. A large majority of them have employee status, with full-time work predominating, are men and have a low or intermediate education level.

SOCIAL PARTNERS

WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Mine, Chemical and Energy Workers' union (EMCEF)** represents 128 European trade unions in 35 countries with more than 2.5 million members. It belongs to the European Trade Union Confederation (ETUC) and is part of the International Federation of Chemical, Energy, Mine and General Workers Unions (ICEM).	• The **European Association for Coal and Lignite (EURACOAL**) represents the coal industries from Belgium, Bulgaria, Czech Republic, France, Germany, Greece, Hungary, Poland, Romania, Slovakia, Slovenia, Spain, Sweden and UK as well as Bosnia-Herzegovina, Serbia, Turkey and Ukraine • The **European Association of Extractive Industries, Metal Ores and Industrial Minerals, (EUROMINES)** represents the European metals and minerals extractive industry in the EU. EUROMINES has members in Austria, Belgium, Bulgaria, Czech Republic, Finland, France, Germany, Greece, Hungary, Ireland, Poland, Slovakia, Sweden, UK and Turkey. • The **European Association of Potash Producers (APEP)** represents Cleveland Potash, Iberpotash and K+S who are active in the UK, Spain and Germany. • The **European Industrial Minerals Association (IMA-Europe)** represents the interests of the industrial minerals industry and 11 European associations specific to individual minerals. IMA-Europe's member organisations come from Austria, Belgium, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, Netherlands, Poland, Portugal, Spain and Sweden, as well as from Norway, Switzerland, Ukraine and Turkey. • The **European Aggregates Association (UEPG)** represents national associations from Austria, Belgium Bulgaria, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Sweden and UK as well as Croatia, Norway, Switzerland and Turkey.

A **representativeness study** for the European extractive industry was conducted by Eurofound in cooperation with the University of Vienna in 2006 and confirmed the representativeness of the above organisations for the sector.

SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES

Under the European Coal and Steel Community (ECSC) Treaty, a sectoral social dialogue committee on coal was set up in 1952. With the expiry of the Treaty in 2002, a sectoral social dialogue committee dealing with mines was established which adopted its rules of procedure in 2004. In 2005, the social partners decided to change the name of the committee to 'extractive industry'.

The committee generally meets four times a year, in biannual plenary meetings and dedicated working groups.

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Position paper of the sectoral social dialogue committee 'extractive industries' (SSDCEI) on the European Commission's proposed Energy and Climate Change Package of 23 January 2008	2008
Energy policy and the future of the extractive industries: inseparably linked	2007
Joint position on the Commission proposal for a EU Framework Directive on Soil Protection	2007
Multi-sectoral agreement on protecting workers against silica crystalline dusts	2006
Joint statement 'Need for a European mineral resources strategy'	2005
Joint declaration on general questions of health and safety in raw materials extraction	2005
Joint opinion on training and lifelong learning	2005
Joint opinion on the anti-dumping proceedings of the European Commission	2005
Joint opinion on the proposed Directive on the management of waste from extractive industries	2003
Joint declaration on training and lifelong learning	2003
Joint statement on the preservation of the safety and health commission for the extractive industries	2003
Joint opinion on the SCOEL recommendation for an occupational exposure limit for nitrogen monoxide	2003

Challenges and perspectives

The EU footwear manufacturing sector is mainly located in the Czech Republic, Hungary, Italy, Slovakia, Spain, Poland and Portugal, with Italy, Spain and Portugal accounting for two thirds of the total production. While the EU remains the second biggest exporter of footwear in the world (13% market share, well below market leader China with 44%), the trade deficit keeps on growing and imports today cover more than three quarters of EU demand. The industry continues to undergo restructuring stemming from the globalisation of markets, deregulation, trade liberalisation and technological change. Between 2000 and 2005, production declined by 8% per year on average. In 2006 and 2007, the average rate of decline slowed to 3% before accelerating to 10% in 2008. Due to the continuous decreases in EU production, the production index in 2008 was 50% below that of 2000.

The number of enterprises has decreased by more than 20% in the last 10 years, and employment in the footwear industry has fallen steeply, declining by 4% per year on average. In the context of restructuring, the sector has introduced organisational and technological changes, outsourced low added value operations to other countries (e.g. Maghreb) and established new markets within and outside Europe, based on competitive advantages due to the high quality of production in technical, design and fashion-related terms and the development of high-demand brands with a strong image. Yet, in contrast with other manufacturing sectors, the drop in employment has not been accompanied by significant productivity gains, and productivity remains significantly below average and varies strongly among Member States. Between 2001 and 2003 alone, the sector lost about 10% of its workforce.

As a labour-intensive sector, the footwear industry faces competition from countries with low labour costs. The EU footwear industry was severely affected by the elimination of the quota system within the World Trade Organisation in January 2005, which increased the number of goods imported from countries outside the EU. The resulting surge in Chinese imports is creating pressure for trade restrictions. To face competition, the sector needs to further enhance its capacity to produce high added-value products through decisive technological breakthroughs in production and marketing processes. Moreover, increased market access to emerging economies, where middle classes are growing, is of strategic importance as these represent a quality-conscious market where the EU has the highest competitive advantage. Finally, counterfeiting is a problem for the European footwear industry, and the implementation of the EU legislation on the protection of design and brands and the enforcement of related international agreements therefore also need to be improved.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including economic and sectoral policies, trade negotiations and impact assessments, training and lifelong learning, working conditions, as well as a code of conduct to promote respect for core labour standards along the supply chain.

Economic and sectoral policies

Within the committee, the social partners monitor developments on trade policy issues with an economic and social impact on their sector. This includes issues such as market access of EU products in other countries, counterfeiting and marking of origin and trade development since the end of the quota system. In addition, they look at industrial and social measures aimed at improving the competitiveness of the sector. In June 2009, the committee held a joint consultation on trade sustainability impact assessments and ongoing trade negotiations, together with the sectoral social dialogue committees for textiles and clothing, and for tanning and leather.

Integrating organisations from the newer Member States and the candidate countries

CEC and ETUF:TCL are actively involved in the promotion of social dialogue in the newer Member States and candidate countries and organise joint social and economic fora with their members in these countries on a regular basis. The first forum took place in 2001 and the second was organised in Turkey in 2004. The objective of these events is to address the social and economic impact of enlargement on the sector and to enhance social dialogue in the newer Member States and candidate countries. In 2008 CEC joined ETUF, Euratex and Cotance in a three-year project (which began in 2005) to support capacity building for social partners in the newer Member States and candidate countries.

Training and lifelong learning

To reduce the imbalance between labour supply and demand in the footwear sector, CEC and ETUF:TCL issued a study in 1997, on changing needs in employment and training. Subsequently, the footwear social partners organised national round tables to raise awareness on the need to enhance quality, update business management methods and modernise work organisation. Other projects have now been launched, aimed at analysing needs and skills in the sector, developing new methodologies and specific training for SMEs.

Working conditions

One of the major outcomes of the committee was the signing in 2000 of a European Framework Agreement/code of conduct calling on member organisations to actively encourage companies, workers, suppliers and subcontractors in their sector to comply with the ILO conventions dealing with core labour standards. This code builds on the 1997 charter on the employment of children that also encourages member organisations and enterprises to integrate the code into their relations with suppliers or subcontractors, and indicates the need for independent verification of its implementation. It also foresees the possibility of CEC and ETUF:TCL organising training and awareness-raising programmes. Within this framework, the social partners launched a joint project in 2005, in cooperation with Social Accountability International (SAI), aimed at developing and delivering training and capacity building for improved working conditions in the EU-25 and Turkey.

Current work programme

The Sectoral Social Dialogue Committee continues to work on corporate social responsibility, enlargement, trade developments such as Chinese imports to the EU, market access, marking of origin and the protection of intellectual property rights.

Spotlight on the sector

<table>
<tr><th colspan="3">SECTOR CLARIFICATION</th></tr>
<tr><td colspan="3">NACE rev.2 class 15.2.0 most closely covers the sector, including the manufacture of footwear.</td></tr>
<tr><th colspan="3">INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS</th></tr>
<tr><td colspan="3">In 2006, the EU footwear sector comprised some 27 000 enterprises, generating EUR 26.2 billion in turnover and EUR 6.9 billion in value added (0.5% of total EU manufacturing) and employing 388 000 people. In all, 88% of footwear workers have employee status and full-time work predominates (96%). Women represent the majority of workers (53%). A total of 95% of the workforce has a low or intermediate educational level. The footwear sector is characterised by networks of micro and small enterprises and employment is concentrated in these, while companies of more than 500 people employ less than 15% of the workforce. SMEs also generate 65% of the added value.</td></tr>
<tr><th colspan="3">SOCIAL PARTNERS</th></tr>
<tr><th>WORKERS' REPRESENTATIVES</th><th colspan="2">EMPLOYERS' REPRESENTATIVES</th></tr>
<tr><td>• The European Trade Union Federation: Textile, Clothing, Leather (ETUF:TCL), represents 70 trade unions in 40 European countries and has at least one member in each Member State, with the exception of Luxembourg and Ireland. ETUF:TCL represents more than 1.2 million workers and is a member organisation of ETUC and of the International Textile, Garment and Leather Workers' Federation (ITGLWF). Maghreb countries were granted 'observer status' in 2003.</td><td colspan="2">• European Confederation of the Footwear Industry/Confédération Européénne de la Chaussure (CEC) represents members in 17 of the EU Member States. It is not represented in Austria, the three Baltic States, Cyprus, Germany, Luxembourg and Malta, but has members in Norway, Ukraine, Russia, Morocco, Tunisia and Turkey.</td></tr>
<tr><td colspan="3">A representativeness study for the European footwear sector was conducted by Eurofound in cooperation with the University of Vienna in 2009 and confirmed the representativeness of the above organisations for the sector.</td></tr>
<tr><th colspan="3">SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES</th></tr>
<tr><td colspan="3">The footwear sector was one of the first industrial sectors to set up a joint European committee (1982). This was replaced and expanded in 1991 by an informal working group and in 1999 by a sectoral social dialogue committee. The committee generally meets once or twice a year, including one annual plenary meeting.</td></tr>
<tr><th colspan="3">RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:</th></tr>
<tr><td colspan="2">Joint declaration : "The EU should adopt origin marking for footwear imported from third countries."</td><td>2006</td></tr>
<tr><td colspan="2">European framework agreement/code of conduct: A charter of the social partners in the footwear sector</td><td>2000</td></tr>
<tr><td colspan="2">Social action programme</td><td>2000</td></tr>
<tr><td colspan="2">Contribution of social partners to the Lisbon Summit</td><td>2000</td></tr>
</table>

Challenges and perspectives

The furniture sector is entering a period of maturation after wrestling with significant changes and job losses over the last decade. It has undergone restructuring in recent decades and developed significant technological advances and business model innovations and is now, as a result, more export-oriented. However, the sector faces significant challenges. Increased reliance on a skilled workforce and efficient production techniques require sufficiently knowledgeable workers, especially in skilled and management positions and new skilled workers coming from existing educational programmes.

For highly specialised products and processing methods, skills become very important. In the past, the sector has been hampered by its image as a 'traditional' manufacturing industry, combined with relatively low wage levels when it comes to finding a workforce with adequate qualifications. At times, companies did not pay much attention to providing appropriate training facilities for young people. Now, in view of the technological changes and modernisation of production processes experienced by the sector, better training of the existing workforce is provided in order to upgrade qualifications and skills and to help employees adapt to new working environments. A better match between supply and demand at all levels has to be ensured.

The challenges on the horizon and the cyclical trends make trained, young and motivated workers and employees the best assets for the SMEs in the sector. In Europe, it is likely that the sector's only sustainable strategy is to concentrate on innovation, research, fashion and design, creation and quality, and the use of new technologies, together with positive industrial relations. In this respect it is important, however, to realise that new processing methods and innovation approaches should not lead to less employment but more and better employment in a friendlier working environment with different working methods.

Hence, it is important that education, availability of skills and organisation of the employment market are well coordinated and that a better image is disseminated in training institutions and the media.

At the international level, the EU furniture industry remains a major player in the global market, accounting for close to 19% of world exports. However, the trade balance has deteriorated dramatically from a surplus of almost EUR 3 billion in 2002 to a deficit of EUR 1.2 billion in 2008. To maintain its external competitiveness, market access improvements and efficient measures to address problems of counterfeiting will be fundamental for this sector.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including enlargement, restructuring, health and safety and training.

Enlargement

In 2002, UEA and EFBWW adopted a joint declaration at a conference where they worked to create effective cooperation with their counterparts in the candidate countries.

Restructuring

In 2005, UEA and EFBWW organised a conference entitled 'The future of the furniture industry in an enlarged Europe'.

Health and safety

In 2007, the social partners organised a conference in Oporto (Portugal) on reducing accidents in the furniture industry, while 2008 saw the UEA, EFBWW and EFIC coordinate a conference in Paris (France) on the best practices for improving workplace environment and working conditions. In both cases, brochures with best practices were printed and disseminated widely.

Training

In 2008, the social partners established a workgroup on training, which launched a project on how to attract young people to this industry.

Current work programme

The social partners are currently working on issues related to vocational training, health and safety, competitiveness, follow-up activities in the candidate countries and the environment.

Spotlight on the sector

SECTOR CLARIFICATION
NACE rev.2 class 31 (mainly equivalent to NACE rev.1.1 class 36.1) most closely covers the sector, including manufacture of office and shop furniture, kitchen and other furniture.
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS
The EU furniture industry is a labour-intensive industry, employing more than 1.5 million people, predominantly low to medium-skilled men, in more than 110 000 undertakings. The sector is dominated by micro enterprises (86% of EU furniture enterprises have less than 10 workers), but there are also some large manufacturers. The production value of this industry reached EUR 105 billion in 2007 – the third annual increase in a row (+5.8%), while labour productivity remains well below average. EU furniture manufacturers exported more than 10% of their production (EUR 11.1 billion) to non-EU countries; an additional 31% of the production was traded between EU Member States. Non-EU imports accounted for 12% of the EU furniture market. Preliminary figures for the first half of 2008, show a slowdown in production and export activities that could worsen if the recession deepens and persists.

SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Federation of Building and Woodworkers (EFBWW)** represents 50 affiliated trade unions in EU-25, with 2.3 million members. It has no members in Cyprus, Estonia, Greece, Lithuania or Malta. EFBWW is a member organisation of the European Trade Union Confederation (ETUC).	• The **European Furniture Manufacturers Federation (UEA)** has affiliates in all the Member States, except Belgium, Denmark, Ireland, Greece, Luxembourg and Slovenia. The UEA also has members in Bosnia-Herzegovina, Norway, Russia and Switzerland. • The **European Furniture Industries Confederation (EFIC)** has affiliates in six Member States as well as in Turkey.

A **representativeness study** for the European furniture industry was conducted by Eurofound in cooperation with the University of Vienna in 2006 and confirmed the representativeness of the above organisations for the sector.

SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
UEA and EFBWW have participated in the Furniture Sectoral Social Dialogue Committee since 2001 when the rules of procedure were adopted. A new sectoral social dialogue partner, the European Furniture Industries Confederation (EFIC), joined in 2006. The committee generally meets four times a year, in biannual plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Enhance the value of work in the furniture industry to attract young people (WAVE)	2009
Joint declaration on the economic crisis	2009
Best practices to improve workplace environment and working conditions (FIWEC)	2008
Furniture Industry accident reduction campaign (FAR)	2007
Joint declaration on the extension of the social dialogue in the enlargement countries	2006
Joint declaration on enlargement	2002

Challenges and perspectives

Energy policy is a top priority for the EU. On 10 January 2007, the European Commission published the Climate and Energy Package: an integrated set of proposals to tackle climate change and create a new EU energy policy. A number of documents directly related to the gas industry have been published. The sector has undergone extensive changes in the past few years as a consequence of the EU's liberalisation of network industries since the second half of the 1990s. The first steps were taken with the adoption of Council Directive 98/30/EC, which came into force in August 2000. In 2003, Directives were adopted setting deadlines for the full opening of the EU energy market: 1 July 2004 for business customers and 1 July 2007 for households.

This key legislation contains a number of obligations for national regulators. They must monitor the development of competition, levels of investment and, where appropriate, the level of prices. This should lead to more transparency and give operators more ability to predict change. The gas sector remains in transition in many European countries, where liberalisation, restructuring and privatisation (EU-12) continue. This process has a profound impact on employment; statistics in the gas sector point towards losses of 12-13% of jobs between 2001 and 2005.

As for electricity, the current challenges for the gas industry include the follow-up of the Commission's adoption of the Third Energy Package and the Climate and Energy Package. The EU commitment to reduce 20% of greenhouse gases emissions will also put pressure on workers as training in new technologies and techniques will be necessary.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2007. The dialogue has covered a range of issues including energy policies and climate change as well as violence at work and demographic change.

The social partners actively support Commission activities concerning the social dimension of the electricity and gas sector, in the context of the Energy Community with South-Eastern Europe.

Violence at work

The social partners also follow the activities of the Cross-industry Social Dialogue Committee. In recognition of the importance of the results of this Committee, they adopted a joint declaration on violence at work supporting the implementation of the agreement on violence in the sector.

Current work programme

Currently, the activities of the Committee are focusing on management of demographic change. The social partners are preparing a practical toolkit on this factor for use at company level

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 35.2 (mainly equivalent to NACE rev.1.1 class 40.2) most closely covers the sector, including production, distribution and trade of gas.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The gas sector in the EU employs around 250 000 people in the production and distribution of gas. The large majority of the workers in the sector have an employee status and full-time work is predominant. 76% of workers are men. 72% of the workforce has a low or intermediate education level.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Mine, Chemical and Energy Workers' Union (EMCEF)** represents 128 European trade unions in 35 countries, with more than 2.5 million members. It organises both blue- and white-collar workers. It belongs to the European Trade Union Confederation (ETUC) and is part of the International Federation of Chemical, Energy, Mine and General Workers' Unions (ICEM). EMCEF represents 300 000 trade union members in electricity. • The **European Federation of Public Service Unions (EPSU)** represents over 216 public sector unions covering approximately 8 million workers in more than 36 EU and candidate countries as well as EFTA countries. EPSU enlarged its geographical scope in June 2009 and will include trade unions from many EU Eastern neighbourhood countries including Armenia, Central Asian Republics, Georgia, Moldova, Russia and Ukraine. EPSU represents 500 000 trade union members in the electricity and gas sector. EPSU is a member of ETUC and is the recognised European regional organisation of Public Services International (PSI).	• **Eurogas** represents the interests of the European Natural Gas industry. The organisation is composed of 47 members from 27 countries, of which 34 are natural gas companies, 12 are federations of natural gas companies, and one is an international organisation.
A **representativeness study** for the European gas industry was conducted by Eurofound in cooperation with the University of Vienna in 2006 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The sectoral social dialogue committee for gas was established in 2007. It generally meets four times a year, in biannual plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Toolkit on demographic change, age management and competencies in the gas sector in Europe	2009
Common declaration on the impact on employment in EU-25 of the opening of electricity and gas markets, and of key EU directives in the field of energy	2007
Joint declaration on violence at work	2007

Challenges and perspectives

The HORECA industry includes catering, hotels, restaurants, cafés, canteens, short-stay accommodation and similar establishments. This sector – together with the tourism sector in general – is very sensitive to business cycles and political events.

It is largely a SME-dominated sector, with over 99% of firms employing fewer than 250 individuals. Large numbers of seasonal workers are hired in addition to permanent staff during peak periods.

In a Communication adopted in 2003 the European Commission called for an EU-wide drive to enhance the economic, social and environmental sustainability of European tourism. Five key issues were identified to ensure the sustainability and competitiveness of the sector: information, training, quality, sustainable development and new technologies.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2007. The dialogue has covered a range of issues including corporate social responsibility (CSR), training and life-long learning and young people. A common project of the European social partners fine-tunes the HORECA Skills and Qualifications Passport which was created in the social dialogue committee.

Corporate social responsibility

In 2004 the social partners adopted policies on CSR that suggest areas for action, beyond legal requirements, with regard to equal opportunities and non-discrimination, working conditions and work organisation, fair pay, vocational training and lifelong learning, health and safety, restructuring and relationships between social partners. They also included provisions for regular follow-up action.

Integrating organisations from the new Member States and candidate countries

In 2002, the social partners adopted a joint declaration on EU enlargement inviting their member associations in the newer Member States and the candidate countries to establish solid and constructive industrial relations and stating their readiness to support them in this task.

Training and lifelong learning

As a result of a study in 2003 on 'New training and development models in the European hospitality sector', as well as of a seminar organised in 2003, guidelines were adopted for training and development (2004) with particular emphasis on the needs of SMEs.

Undeclared work

The sectoral social dialogue committee has taken a position against illegal and undeclared work in the sector and pledged support for any initiative of their affiliated organisations aimed at avoiding exploitation of workers and social dumping.

Young people

In support of the European Youth Initiative adopted by the European Council, the sectoral social dialogue committee released a joint statement in 2005 on the importance of creating favourable employment conditions in the sector for young people. Key areas of action identified by the social partners relate to training initiatives including e-learning, provision of places for apprentices and trainees, and encouraging cross-border mobility.

Current work programme

Following their contribution to the European Youth Initiative, the social partners are currently working on issues relating to youth employment and mobility, including the development of a qualifications and skills passport for the European hospitality sector. The CSR project will be followed up by collecting examples of good practice and promoting the code of conduct on CSR in the hospitality sector, developed under the project at national level. In addition, legislative developments are being analysed with regard to working time and the internal market for services.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 classes 55-56 (mainly equivalent to NACE rev.1.1 class 55) most closely covers the sector, including hotels and accommodation, restaurants, catering, cafés, canteens, short-stay accommodation and similar establishments.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The EU HORECA sector employs almost 9.5 million workers, spread across more than 1.6 million enterprises. The hospitality industry is very labour-intensive which means that growth has a strong impact on employment. Hotels and restaurants are major employers of young people: about half of the workforce is below 35 years of age. There are more women (55%) than men (45%) working in the sector, and more than 70% of employment contracts are full-time contracts. Although over 90% of enterprises in the sector employ fewer than 10 people, larger enterprises are important in terms of employment. Over 45% of employment is concentrated in these enterprises, and a sub-sector of HORECA, contract catering, is strongly characterised by large enterprises of this type.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Federation of Food, Agriculture and Tourism Workers (EFFAT)** represents 128 national trade unions from 37 European countries with more than 2.6 million members overall. EFFAT is a member of the European Trade Union Confederation (ETUC), and is a regional organisation of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF).	• The **Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments** (HOTREC) represents 40 national trade and employers' associations from the EU and has members in all Member States (except Cyprus, Luxembourg, Slovenia and Slovakia), as well as in Norway and Switzerland.
A representativeness study for the European HORECA sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2001 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
An informal sectoral social dialogue was established in 1983, and the Sectoral Social Dialogue Committee was established in 1999. It meets up to six times a year, in biannual plenary meetings and dedicated working groups.	

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint statement on the continuation of the work on the "European Qualification and Skill's Passport	2008
Young people and the hospitality industry – contribution to the European Youth Initiative	2005
Common reply to the Commission consultation (31 January 2005) on: 2006 – European Year of Mobility for Workers – Towards a European Labour Market	2005
An initiative for improving corporate social responsibility (CSR) in the hospitality sector – code of conduct	2004
Joint recommendation: guidelines for training and development, especially in SMEs, in the hotel, restaurant and café sector	2004
Joint declaration on EU enlargement	2002
Joint comments on the Commission communication "Working together for the Future of European Tourism"	2002

Challenges and perspectives

The health of the EU population has never been better. Infant mortality has fallen sharply in recent years and life expectancy at birth has increased to between 75 and 79 years in all Member States. In the last three decades, healthcare spending as a proportion of GDP has substantially increased in the whole EU. As a result, Member States have been undertaking a wide range of structural reforms and cost containment measures in order to improve the efficiency and effectiveness of their health systems.

Between 2008 and 2060 the population of the EU aged 65 and over is projected to increase by 66.9 million and the 'very old' (80+) will be the fastest growing segment of the population. The introduction of new technology is making it possible to increase the range and quality of healthcare in terms of diagnosis, prevention and treatment – but this has to be paid for and staff need to be trained to use it.

The shortage of health workers is global. Unless the EU takes appropriate steps to produce and retain sufficient numbers of its own health workers, the negative impact of migration on the health systems is likely to increase.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2006. The dialogue has covered a range of issues including recruitment and health and safety.

Recruitment

In their capacity of European social partners, HOSPEEM and EPSU adopted in 2008 a common 'Code of Conduct and follow-up on ethical cross-border recruitment and retention', which aims to promote ethical behaviour and stop unethical practices in cross-border recruitment of healthcare workers.

Health and safety

On the occasion of the second phase consultation of social partners on the issue of needlestick injuries, EPSU and HOSPEEM informed the Commission of their intent to launch negotiations on sharp injuries in 2009.

Framework agreement on preventing injuries from the use of sharps

In response to consultations from the European Commission on possible legislative initiatives on needlesticks, the social partners decided to start negotiations on a framework agreement on preventing injuries from the use of sharps. These negotiations were concluded with an agreement in July 2009, and social partners asked for its implementation through Council Directive in accordance with Art. 155 TFEU. The Commission adopted its related legislative proposal on 26 October 2009, and the Directive implementing the framework agreement was adopted by the Council on 11 May 2010.

Current work programme

HOSPEEM and EPSU have agreed to effectively implement the code of conduct within a period of three years after adoption, through their respective members. In this period, the social partners in the hospital sector will monitor the situation and report at least once a year back to the social dialogue committee about the progress made. By the end of the fourth year, a report will be issued on the overall implementation

Spotlight on the sector

SECTOR CLARIFICATION

NACE rev.2 classes 86-87, and notably NACE rev.2 class 86.1 (mainly equivalent to NACE rev.1.1 class 85.11), most closely cover the sector, including hospital and human health and care activities.

INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS

Healthcare constitutes one of the most significant sectors of the EU economy, providing employment for one in 10 of the EU workforce. Approximately 70% of healthcare budgets are allocated to salaries and other charges related directly to employment of the workforce. More than 16.5 million people are employed in human health and residential care activities in general, of which more than 4.5 million are in hospital activities.

SOCIAL PARTNERS

WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Federation of Public Service Unions (EPSU)** covers all of the EU Member States. EPSU generally brings together the largest national unions in the sector, and represents the majority of the sector's unionised employees. The EPSU represents 3.5 million health and social service workers across Europe.	• The **European Hospital and Healthcare Employers' Association (HOSPEEM)** aims to group national employer associations operating in the hospital and healthcare sector at European level, in order to coordinate their views and actions with regard to a sector and a market in constant evolution. HOPSEEM represents employers in 12 Member States and Norway.

A **representativeness study** for the European hospital sector was conducted by Eurofound in cooperation with the University of Vienna in 2007 and confirmed the representativeness of the above organisations for the sector.

SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES

The Hospital social dialogue committee was created in 2006, with EPSU covering the workers' side and HOSPEEM representing employers. The latter signed, together with the European Hospital and Healthcare Federation (HOPE), a cooperation agreement on representation of the private sphere in the committee.

The committee meets up to four times a year, in biannual plenary meetings and dedicated working groups, and it has held an additional series of negotiation meetings on health and safety issues.

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Framework agreement on preventing injuries from the use of sharps	2009
Code of conduct and follow-up on ethical cross-border recruitment and retention	2008
Joint declaration on health services	2007

Challenges and perspectives

Although the cleaning industry responds to fundamental needs of society, such as cleanliness, hygiene (particularly in hospitals, the food industry, schools, etc.) and protection of the environment, it remains relatively unknown. It is therefore in the interest of both employers and employees to promote it and bolster its public image.

The demand for cleaning services has grown steadily over recent years as a direct consequence of outsourcing in administrations and companies. Because of this growth, the sector is facing common challenges and opportunities. The quality of work is increasingly important as are facility management, support services and multi-tasking. Companies are confronted with difficulties in recruiting, particularly because of special demands for early morning and late afternoon/early evening services. Full-time employment is difficult to achieve and consequently there are also problems with absenteeism, staff motivation and turnover. However, there are good opportunities for development and diversification of work.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1998. The dialogue has covered a range of issues including undeclared work, public procurement and working conditions.

Undeclared work

On the basis of the Declaration on Undeclared Work, the social partners continue to analyse the problems and to try to fight against undeclared work. They are raising awareness of the problem and its implications on the quality of work, staff motivation and customer satisfaction.

Public procurement

In order to promote the selection of best value, rather than the lowest price, in calls for tenders, the social partners produced a handbook in 2001. This is a very important, practical tool for organisations awarding such contracts.

Working conditions

In 2007, the social partners developed a manual on ergonomics in cleaning operations. The prevention of professional risks and the fight against work accidents were a priority for EFCI and UNI europa. Partners also underlined the importance of training for workers in the sector. The guide covers ergonomic aspects such as bodily position and working positions.

In 2007, the social partners also adopted a joint declaration on day-time cleaning with the intention to underline its benefits for clients, contractors and employees. For the client, day-time work leads to reduced costs and more reliable service. For the contractor, better staff availability and higher productivity can be achieved. For the cleaning workers, day-time work is better accepted socially and easier to combine with family life. In addition, day-time cleaning improves the dignity and skills of workers.

Current work programme

The cleaning industry social partners are currently working on the modernisation of work organisation, the promotion of multi-tasking and day-time work, initiatives to enhance the quality of cleaning services and the implementation of European social partner initiatives.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 81.2 (mainly equivalent to NACE rev.1.1 class 74.7) most closely covers the sector, including: services provided by specialised contractors; building maintenance and associated cleaning; cleaning of trains, buses and planes; waste management services; and disinfecting and exterminating activities.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The EU cleaning industry employs around 3 million people in more than 100 000 undertakings. In all, 92% of workers in the sector have employee status, while there is a high prevalence of undeclared work in domestic cleaning for private households and 51% of workers work part-time. Of workers in the cleaning industry, 72% are women and 93% have a low or intermediate education level. The cleaning industry is dominated by a majority of small or micro-enterprises: almost 75% of companies employ fewer than 10 people. On the other hand, a few large companies, of which some are multinationals, represent a large part of the turnover and employment in the sector. About 3% of companies employ more than 500 people but these account for almost half of the turnover of the industry.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• **UNI europa, is a part of the UNI global union** which represents around 1 000 trade unions in 140 countries and 7 million workers in 330 European trade unions. As a European trade union federation for services and communication, it is responsible for social dialogue with the corresponding employers' organisations in various areas of activity in the service sector, including the cleaning industry for which it has a specific section representing 30 trade unions and more than 200 000 members. UNI europa has no members in the cleaning industry in Cyprus, Czech Republic, Latvia, Malta, Slovakia or Slovenia.	• **European Federation of Cleaning Industries (EFCI)** represents the employers' side and its members are national trade associations in EU-27 and Norway. EFCI has no members in Bulgaria, Cyprus, Estonia, Greece, Latvia, Lithuania, Malta or Romania.
A **representativeness study** for the European cleaning industry was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2004 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The social partners have been working together in an informal working party since 1992. The Sectoral Social Dialogue Committee for the cleaning industry adopted its internal rules of procedure in 1998 and has been active since the following year. The committee generally meets three to four times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint declaration on responsible awarding of contracts	2008
Joint manual of ergonomics in cleaning operations	2007
Joint declaration on day time cleaning	2007
Common recommendations of the European social partners for the cleaning industry	2004
Joint declaration on selecting best value for the public procurement of cleaning services	2004
Sectoral handbook on social considerations in public procurement	2001

Challenges and perspectives

Inland waterways include rivers and canals used to transport goods within Europe. The EU has over 37 000 km of inland waterways and the sector employs a variety of workers, from ship captains and crews to port employees.

20 out of the 27 Member States have inland waterways (12 of which have an interconnected waterway network), river transport accounts for a 7% share of the total inland transport of goods in the EU.

In 2006, the European Commission adopted a Communication on the promotion of inland waterway transport. Lasting 2006–13, the NAIADES Action Programme focuses on five strategic areas for a comprehensive policy on inland waterway transport: market, fleet, jobs and skills, image, and infrastructure. The measures are rounded off by reflections on an appropriate organisational structure.

Inland waterway transport in the EU is currently administered under different regimes – namely the Mannheim and Belgrade Conventions for navigation on the Rhine and Danube as well as relevant EU legislation and legislation from the Member States. Despite well-established cooperation between the participants, the current framework is characterised by a lack of efficiency. Its legitimacy is also challenged by the fact that only the EU can adopt binding rules for its entire network. There are furthermore cases of inland ships being 'flagged out' to EU member states without inland waterways while operating on a permanent basis in other member states, thus raising questions regarding the applicability of labour and social laws and collective bargaining agreements.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2005. The dialogue has covered a range of issues including training and lifelong learning, and working time.

Training and lifelong learning

The social partners are aiming for the harmonisation of job profiles and professional qualifications and intend to adopt joint recommendations on this issue.

Working time

According to the committee, the current Working Time Directive does not take into account the specific needs of the sector, such as a definition of periods of availability. The parties therefore officially started negotiations in January 2008 in order to conclude a social partners' agreement which would offer a sector-specific solution for working-time arrangements.

Current work programme

In addition to the abovementioned points, the current work programme includes a reflection on improvements of on-board working and living conditions and access to port side facilities and the establishment of a compendium of case studies on social dumping and unfair competition in inland waterways.

Spotlight on the sector

SECTOR CLARIFICATION

NACE rev.2 classes 50.3-50.4 (mainly equivalent to NACE rev.1.1 class 61.2) and NACE rev.2 class 52.2 most closely cover the sector, including inland passenger and freight water transport as well as relevant support activities.

INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS

Inland water transport services in the EU account for almost 45.000 employees in some 9.000 companies (2006). In the major inland waterway transport countries (Germany, Netherlands, UK), the single-vessel operators, which are often family enterprises, constitute by far the majority of enterprises.

SOCIAL PARTNERS

WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Transport Workers' Federation (ETF)** represents some 3 million workers from all transport modes in 39 European countries.	• The **European Barge Union (EBU)** represents the barge owners and barge operators in Austria, Belgium, the Czech Republic, France, Germany, the Netherlands, Romania and Switzerland. • The **European Skippers' Organisation (ESO)** represents the interests of the European private inland shipping entrepreneurs at EU level. The ESO-Council is composed of representatives of Belgian, Dutch, French and German inland shipping organisations.

Representativeness studies for the European inland waterways sector were conducted in 2000 by the European Commission in cooperation with the Université Catholique de Louvain, and in 2008 by Eurofound in cooperation with the University of Vienna. These studies confirmed the representativeness of the above organisations for the sector.

SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES

The inland waterway transport social dialogue committee was established in 1999, following activities in the context of a joint committee since 1967, and the internal rules of procedure were adopted in 2005. It generally meets three to four times a year, in plenary meetings and dedicated working groups, and it has been organising additional negotiation meetings on working time issues.

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint sectoral contribution to the Commission's consultation on the future of transport	2009
Joint declaration concerning social security provisions in inland waterways transport	2009

Challenges and perspectives

The EU is pursuing a single insurance market, promoting economic efficiency and market integration. A common framework has been developed to allow insurers to operate throughout the EU and to establish and provide services freely. This is currently being updated and simplified in response to market developments and product changes. The advent of the single market in insurance has increased competition in the sector. Mergers and acquisitions, particularly across borders, have become instruments for optimising results. Another trend is towards increasing involvement of private insurance companies in managing certain activities traditionally carried out by state agencies, such as pension funds or social security benefits.

Following the adoption in 1999 of the Financial Services Action Plan, there is legislation in the sector for motor insurance, solvency, reinsurance, insurance and e-commerce, insurance guarantee schemes and insurance accounting.

European social dialogue: key issues, recent outcomes and current work programme

Since the creation of the insurance committee, the social partners have worked on issues dealing with enlargement, vocational training, qualifications and access to the profession for insurance intermediaries as well as work organisation (specifically working time, especially in relation to call centres).

Current work programme

Currently social partners are working on issues concerning EU enlargement and demographic change. They are also contributing to the initiative on future skills needs run by the European Commission.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 65 (mainly equivalent to NACE rev.1.1 class 66) most closely covers the sector and includes insurance, reinsurance and pension funding, except compulsory social security.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
Around 1.2 million people work in the insurance sector in the EU. In all, 86% of insurance workers have employee status and full-time work predominates (86%). Women account for more than half of the total employed (57%) and 42% of the workforce have a high education level.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• **UNI europa, is part of UNI global union** which represents around 1 000 trade unions in 140 countries and 7 million workers in 330 European trade unions. As a European trade union federation for services and communication it is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including the finance sector, for which it has a specific section. UNI europa finance has members in all EU countries.	• The **European Federation of National Insurance Associations/Comité Européen des Assurances (CEA)** is a federation of national associations of insurance companies composed of associations or employers' organisations with one member from each country. It has members in each EU Member State as well as in Croatia and Turkey and all EFTA countries (Iceland, Liechtenstein, Switzerland and Norway). More than 5 000 European insurance and reinsurance companies are represented by CEA and they employ more than 1 million people. • The **Association of Mutual Insurers and Insurance Cooperatives in Europe (AMICE)** is made up of mutual and cooperative insurance organisations. AMICE has more than 120 direct members and 2 700 indirect members, representing over 40% of the insurance companies in Europe It has members in 15 Member States and Switzerland. • The **European Federation of Insurance Intermediaries (BIPAR)** consists of some 47 national associations of professional insurance agents and brokers from all Member States except Bulgaria, Latvia and Slovenia. BIPAR also has members in Israel, Lebanon, Norway, the Russian Federation, Switzerland, Turkey and Ukraine. BIPAR represents about 80 000 self-employed and corporate professional insurance intermediaries, employing more than 250 000 people and is a member of the World Federation of Insurance Intermediaries (WFII).
A representativeness study for the European insurance sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2000 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
An informal working party had been in place since 1987 and the sectoral dialogue committee was established in 1999 when the internal rules of procedure were adopted. It generally meets three to four times a year, in biannual plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Proposal for a joint statement on vocational training in the insurance sector at European level	2003
CEA Survey on supply and demand for training in EU countries (+Norway)	2003
Reflections on the Commission's Green Paper on Partnership for a new Organisation of Work	1998

Challenges and perspectives

The live performance sector covers artistic and literary creation, interpretation, operation of arts facilities, fairs and amusement parks and other entertainment activities in direct contact with the public.

The slow growth or even decline in public subsidies for the sector in EU countries in recent years has put the budgets of many established performing arts organisations under pressure. Moreover, the nature of the live performance sector necessitates significant geographical mobility. However, the European social partners consider that there has been no satisfactory response to the problems of visas, work permits, residence, recognition of diplomas and status of artists in terms of social protection and taxation which are necessary if workers are to be fully mobile. These problems stem from disparities in legislation between European countries.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2007. The dialogue has covered a range of issues including integrating organisations from new Member States and training and lifelong learning.

Integrating organisations from the newer Member States and candidate countries

In 2004, the sectoral social dialogue committee organised a conference on EU enlargement. At the event they issued a joint opinion, emphasising the need for: effective social dialogue; mechanisms and practices guaranteeing respect for freedom of association and negotiation; ensuring the representativeness and mandates of the social partners; and supporting a formal system to ratify the outcome of negotiations and ensure their implementation.

In addition, EAEA and PEARLE* have organised several regional round tables in Estonia, Hungary, Poland, Romania and Bulgaria with the aim of strengthening social dialogue and reinforcing the capacities of national partner organisations in the newer Member States.

Training and lifelong learning

In 2000, the live performance social partners organised a conference on lifelong learning and a joint declaration was adopted which stated that lifelong learning must be recognised as a right. It was necessary to create an inventory of jobs and training available in the EU, and to develop joint projects analysing the impact of economic and technological developments on the employment market and on the new needs regarding training and qualifications.

Since the inception of the social dialogue committee, the training of technicians has been an ongoing issue on the agenda. Social partners are monitoring a Leonardo project which is piloting a competence analysis tool. In 2009, the social partners implemented a project analysing initiatives in the field of theatre technician training at European, trans-national and national levels. The report was presented and discussed at a training forum in March 2009 in Milan (Italy) and further steps discussed at the plenary session in November 2009.

Current work programme

The live performance sectoral social dialogue committee is working on issues of EU enlargement, technical training in theatre and mobility. In response to the European Year of Mobility in 2006, they prepared a study on impediments to mobility in the EU's live performance sector and possible solutions.

EAEA and PEARLE* are currently working on the issue of visas and work permits for performers travelling to the USA. In September 2008, they sent a letter to the relevant Commission services asking them to work jointly with the US Government to put in place a modern, efficient, secure and stable visa and work permit system for live performers similar to that for professional footballers, golfers, jockeys, racing drivers and tennis players.

The Committee is also closely involved in the work of the cultural platforms established in June 2008 by the Directorate-General for Education and Culture which aim to promote cultural diversity, intercultural dialogue and culture both as a catalyst for creativity (in line with aims of Lisbon strategy) and within the EU's international relations.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 90 (mainly equivalent to NACE rev.1.1 class 92.3) most closely covers the sector, including artistic and literary creation, performing arts, interpretation, operation of arts facilities, fairs and amusement parks and other entertainment activities in direct contact with the public.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The EU live performance sector accounts for almost 1 million employed, up to half of which have self-employed status. Among the employees, almost a third work part-time. Moreover, more than 40% of workers are women and more than 40% of the workforce has a high education level.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Arts and Entertainment Alliance (EAEA)** is recognised as the social partner on the workers' side. The EAEA comprises EURO-MEI, FIM and FIA, and represents cultural and media workers at the international and regional level. The EAEA is recognised as the industry federation for media, entertainment and arts by the ETUC. • The **Media and Entertainment International-Technical Professions of the Entertainment Sector (EURO-MEI)** is part of Union Network International (UNI), which represents over 130 trade unions with a total membership of 250 000 workers and 14 service sectors. • The **European Federation of Artists and Actors (EuroFIA)** represents trade unions in the EU (with the exception of Lithuania and Malta) as well as in EFTA countries. It is part of the International Federation of Artists and Actors (FIA) which represents more than 100 unions, guilds and associations, in more than 75 countries. • The **International Federation of Musicians (FIM)** represents 24 member organisations in the EU, and 72 throughout the world. It has close working relationships within the framework of the International Arts and Entertainment Alliance (IAEA).	• The **Performing Arts Employers Associations League in Europe (PEARLE*)** represents more than 3 000 employers from theatres, theatre production companies, orchestras and music ensembles, opera houses, ballet and dance companies, festivals, and other organisations within the performing arts sector. PEARLE* is a member of the European Employers' Network (EEN) supported by the Union of Industrial and Employers Confederations of Europe (UNICE) and of the European Forum for the Arts and Heritage (EFAH). PEARLE* has members in every EU country, except Cyprus, Greece, Ireland, Latvia, Lithuania, Luxembourg, Malta, Portugal and Slovenia. PEARLE* also has members in Norway and Switzerland.
A representativeness study for the European live performance sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2004 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The Live Performance Sectoral Social Dialogue Committee was established in 1999 and the internal rules of procedure were adopted in January 2003. It meets up to six times a year, in biannual plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint statement on creativity, innovation and the role of the cultural sector	2009
Joint statement on the impact of the financial crisis in the live performance sector	2009
Joint statement on the Commission Proposal for a Directive providing for sanctions against employers of illegally staying third-country nationals	2007
Bucharest Declaration: Strengthening social dialogue and reinforcing capacities of national social partner organisations in the newer Member States in the performing arts sector	2007
Sofia Declaration: Strengthening social dialogue and reinforcing capacities of national social partner organisations in the new Member States in the performing arts sector	2007
Joint statement on the Communication from the Commission on a European Agenda for Culture in a globalising World	2007
Joint position on Green Paper on Labour Law	2007
Joint position on the expected Communication on Culture	2007
Joint declaration on the Unesco Convention on the protection and promotion of the diversity of cultural expressions in relation to the GATS-negotiations within the WTO	2005
Tallinn Declaration 'Towards enlargement of the European social dialogue in the performing arts sector'	2004

Challenges and perspectives

A Commission White Paper (2004) on public services set out its approach to developing a role for the EU in fostering high-quality services, accessible to all citizens and enterprises in the EU at affordable prices. These services can be organised in cooperation with the private sector or delivered by private and public undertakings, but public authorities remain responsible for market regulation and monitoring outcomes.

This responsibility is carried out in the context of decisions made at EU or national level. However, it is primarily for the relevant national, regional and local authorities to define, organise, finance and monitor this area. The Commission is now taking action to modernise and clarify the framework in which public services are delivered.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 2004. The dialogue has covered a range of issues including gender equality and telework.

Gender equality

Recognising the importance of gender equality in all spheres of public life and the key role of local and regional authorities in promoting gender equality in their communities, EPSU and CEMR adopted guidelines in order to achieve equality between women and men at work. This encouraged member organisations to develop a strategy including: positive action programmes; diversification of women's educational and professional choices; campaigning against sexual harassment; encouraging work-life balance; and supporting equal pay for work of equal value.

Telework

In 2004 the sectoral social dialogue committee called upon its member organisations to implement the 2002 cross-industry framework agreement on telework, in accordance with national procedures and practices.

Current work programme

The committee is now working on its third work programme covering the period 2008-2010, agreed in the plenary meeting of December 2007. The work programme identifies the following priorities: promoting social dialogue and contributing to the Commission's aim to strengthen social dialogue in the newer Member States and candidate countries; evaluating experiences in various forms of local service provision (outsourcing/insourcing, public-private partnerships, inter-municipal cooperation); tackling harassment and violence at work; and promoting gender equality and reconciliation of work and family life. The partners have agreed that local government must be promoted in the newer EU Member States, that the sector is integral to the promotion of social inclusion throughout the EU and that it is important to recruit and retain quality staff by ensuring good working conditions.

Spotlight on the sector

SECTOR CLARIFICATION	
No specific NACE classification covers local and regional government. NACE rev.2 class 84.1 (mainly equivalent to NACE rev.1.1 class 75.1) covers administration of the state and the economic and social policy of the community, and NACE rev.2 class 84.2 (mainly equivalent to NACE rev.1.1 class 75.2) covers the provision of services to the community as a whole (excluding central government). Other activities such as social work, health care and education are covered by other NACE classes and may in many cases form part of local and regional government.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
In the EU, 15.5 million people work in public administration, including defence and compulsory social security systems. Virtually all local and regional government workers have employee status and 11% work part-time. Some 45% of these workers are women and some 35% of the workforce has a high level of education.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Federation of Public Service Unions (EPSU)** represents over 250 public sector unions, covering approximately 8 million workers in 47 European countries. EPSU is a member of the European Trade Union Confederation (ETUC) and Public Service International (PSI). In 2003, EPSU came to an agreement with the European Federation of Public Service Employees (EUROFEDOP) concerning the integration of two permanent representatives from EUROFEDOP into EPSU's delegation.	• The **Council of European Municipalities and Regions (CEMR)** represents national associations of towns, municipalities and regions from every EU country, as well as Albania, Bosnia and Herzegovina, the Former Yugoslav Republic of Macedonia, Iceland, Israel, Montenegro, Norway, Serbia, Switzerland and Ukraine. Together, these associations represent some 100 000 local and regional authorities. The CEMR is the European section of the international association of United Cities and Local Governments (UCLG).
A **representativeness study** for the European local and regional government sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2001 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The social partners began working together and issuing common texts in 1998 and have continued as the sectoral social dialogue committee since they adopted their internal rules of procedure in 2004. The committee meets up to six times a year, in biannual plenary meetings and dedicated working groups. In 2009, the committee produced an overview of social dialogue arrangements in the sector.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint message to the Spring European Council	2009
Joint statement on the active inclusion of those furthest from the labour market	2008
'Reform of public services – What role for social dialogue?'	2008
Guidelines to drawing up gender equality action plans	2007
Joint statement on the development of social dialogue in local and regional government	2006
Joint statement on EU employment policy	2005
Joint statement on telework	2004

Challenges and perspectives

The maritime transport sector is a highly globalised industry, operating under stringent global competition rules. The continuously increasing division of labour internationally tends to further fuel global maritime trade, in particular with regard to container shipping. Europe continues to play a leading role in the industry: While only a minority of ships worldwide fly the flag of an EU Member State, more than 40% of the world's fleet is controlled by EU shipping companies. At the same time, about 90% of external trade and over 40% of intra-EU trade are conducted by sea.

However, the industry is facing important challenges due to a number of factors, namely the high level of globalisation in the shipping industry and the use of 'flags of convenience', with countries trying to attract ship-owners by offering more favourable or less restrictive taxation, social legislation and safety or environmental standards. Flagging out and open registers have an impact on the employment and working conditions of seafarers in the EU, leading to a decrease in the number of EU seafarers employed on EU-flagged ships and an increase in the number of seafarers from non-EU countries. Indeed, over the past 20 years, the number of EU seafarers in EU shipping has declined by more than 40%, while employment among non-EU seafarers has increased by almost 20%. At the same time, the number of companies has largely increased, reflecting the liberalisation and partial expansion of the sector.

In this context it is essential to define and effectively enforce global minimum standards for employment and health and safety conditions for seafarers employed or working on board. To meet these challenges, the social partners have focused on promoting and implementing internationally recognised International Labour Organisation (ILO) standards. They have negotiated the standards of the ILO Maritime Labour Convention and finally agreed on the binding implementation of various standards into EU law. This initiative has led to strict enforcement and application of the Convention within the EU, thus ensuring a level playing field for all those carrying goods by sea.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including working conditions and working time.

Working conditions

For several years the development and implementation of measures ensuring good working conditions and a level playing field for carriers between maritime ports has been a major topic in the sector. In 2006, the Maritime Labour Convention was adopted by the ILO and the social partners decided to undertake further initiatives to promote the application and implementation of the agreed ILO standards.

After a year and a half of negotiations, they finally agreed on the need to integrate certain ILO standards into EU law and asked the Commission to propose a Council Directive on the basis of Article 139 of the Treaty. The European Commission proposed this Council Directive implementing the social partners' agreement on 2 July 2008 (COM(2008)422 final) and the Council approved it in December 2008. The work of the social partners will strengthen the standards at local, European and international level. The standards will become binding and enforceable, thus representing a significant contribution by the social partners to the situation.

Working time

In September 1998, the social partners concluded an agreement on the working time of seafarers. Through the joint agreement of 19 May 2008, the rules and provisions were adapted to the internationally agreed ILO standards. They specify the normal working hours of seafarers, hours of rest and holidays.

Framework agreement on the Maritime Labour Convention

Social partners negotiated the standards of the ILO Maritime Labour Convention and in 2006, settled on a framework agreement on the binding implementation of various standards into EU law. This initiative has led to strict enforcement and application of the Convention within the EU, thus ensuring a level playing field for all those carrying goods by sea. The agreement was implemented through Council Directive in 2008.

Current work programme

ETF and ECSA intend to assist the Member States in the transposition of the EU Directive implementing the 2008 social partner agreement. In addition, they want to encourage a speedy ratification of the ILO Maritime Labour Convention and to discuss best recruitment practices and campaigns.

In addition, they wish to be involved in the Commission's work on strategic goals and recommendations for EU maritime transport policy for the period 2008–18. Health and safety in the maritime transport sector should be addressed through the publication of statistics on deaths and accidents at sea and through campaigns on responsibilities and obligations onboard stemming from EU legislation. The role of human factors in maritime casualties will be discussed as well as tighter controls on technical casualty investigations and the effective implementation of the Third Maritime Safety Package. The social partners are also currently carrying out studies on recruitment and training policies in the maritime transport sector.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 classes 50.1-50.2 (mainly equivalent to NACE rev.1.1 class 61.1) and NACE rev.2 class 52.2 most closely cover the sector, including sea and coastal passenger and freight transport as well as relevant support activities.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The EU maritime transport sector employs some 300 000 people in more than 10 000 enterprises. While general employment trends are in decline, the number of companies has continuously increased. More than 90% of seafarers have employee status and full-time work predominates. Less than a quarter of employees (23%) are women, and more than three quarters of the workforce has a low or intermediate education level.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Transport Workers' Federation (ETF)** represents nearly 3 million workers from all transport modes in 40 European countries.	• The **European Community Shipowners' Association (ECSA)** comprises the national ship-owners' associations of all EU Member States and Norway.
Representativeness studies for the European maritime transport sector were conducted in 2000 by the European Commission in cooperation with the Université Catholique de Louvain, and in 2007 by Eurofound in cooperation with the University of Vienna. These studies confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
In 1987 the European social partners established a joint committee on sea transport which was transformed into a sectoral social dialogue committee in 1999. It generally meets three to four times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Framework agreement on the Maritime Labour Convention	2008
Report on the mapping of career paths in the maritime industries	2005
Equality of opportunity and diversity in the European shipping industry - Guidelines on eliminating workplace harassment and bullying	2004

Challenges and perspectives

In recent years there have been several innovations in hairdressing and personal services technology, products and techniques, while new developments largely revolve around improvements in user-friendliness, quality and safety of mass-marketed products for home use, in particular colouring products. This growing trend towards 'do-it-yourself', is however leading to a reduction in business. In order to compete, the personal services industry is promoting quality, diversifying and developing new niche markets such as health and beauty treatments.

In some EU countries, significant efforts have also been made to raise training standards and the quality of entrants into the profession, and to support mobility of workers through recognition of national qualifications/skills, while taking into account the European Qualifications Framework.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including health and safety, training and lifelong learning.

Health and safety

Health and safety at work is an important topic, given that individuals working in hairdressing are affected by issues including breathing problems and allergies stemming from regular contact with chemical products, as well as musculoskeletal problems due to frequently adopting non-ergonomic postures. The social partners are currently carrying out a project with an external contractor in order to get an overview of occupational skin diseases in this specific profession. In parallel, the social partners are negotiating an agreement on health protection, based on the results of this project.

Training and lifelong learning

Development of the skills of the workforce through training is one of the key topics in the work of the personal services social dialogue committee. Since 2002, the social partners have been working towards increasing quality standards through the mutual recognition of qualifications. They have recently finalised a project aimed at achieving harmonisation of national qualifications and skills sets in accordance with the European Qualifications Framework. In June 2009 the social partners signed an agreement introducing European-level qualifications certificates to the sector.

Current work programme

UNI europa and Coiffure EU are currently working on issues dealing with risk prevention and health and safety at work, as well as harmonisation of skills certification in relation to the European Qualifications Framework as part of the implementation of their 2009 agreement.

Spotlight on the sector

<table>
<tr><th colspan="2">SECTOR CLARIFICATION</th></tr>
<tr><td colspan="2">NACE rev.2 class 96.02 (mainly equivalent to NACE rev.1.1 class 93.02) most closely covers the sector, including hairdressing and other beauty treatment.</td></tr>
<tr><th colspan="2">INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS</th></tr>
<tr><td colspan="2">In the EU, nearly 1.5 million workers are employed in almost 500 000 hairdressing salons. The sector is dominated by small and micro enterprises, and self-employment and undeclared work are not uncommon. More than 80% of workers in the sector are women.

Conditions in the sector regarding training, quality of service, salaries and working conditions vary widely across Member States. In some countries the high rate of hairdressing activities in the illegal economy causes considerable problems and downward pressure on working conditions in the sector. The European social partners' activities have thus focused on upward harmonisation of the quality of service and employment conditions across the European Union.</td></tr>
<tr><th colspan="2">SOCIAL PARTNERS</th></tr>
<tr><th>WORKERS' REPRESENTATIVES</th><th>EMPLOYERS' REPRESENTATIVES</th></tr>
<tr><td>• UNI europa is part of UNI global union which represents around a 1 000 trade unions in 140 countries and 7 million workers in 330 European trade unions. As the European trade union federation for services and communication, it is responsible for social dialogue with the corresponding employers' organisations in various areas of activity in the service sector, including personal services, for which it has a specific section called 'Hair and Beauty'. UNI europa Hair and Beauty has members in all EU countries.</td><td>• Coiffure EU is the association of employers' organisations active in the field of hairdressing in the following EU and EFTA countries: Austria, Belgium, Czech Republic, Cyprus, Denmark, Finland, France, Germany, Greece, Hungary, Italy, Malta, Netherlands, Poland, Slovenia, Sweden, UK, Switzerland and Norway.</td></tr>
<tr><td colspan="2">Representativeness studies for the European personal services sector were conducted in 2001 by the European Commission in cooperation with the Université Catholique de Louvain, and in 2008 by Eurofound in cooperation with the University of Vienna. These studies confirmed the representativeness of the above organisations for the sector.</td></tr>
<tr><th colspan="2">SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES</th></tr>
<tr><td colspan="2">The Sectoral Dialogue Committee for the Personal Services was created in 1999 and comprises trade unions and employers' representatives in the personal services sector. There is an interest among beauticians to participate on an equal footing in social dialogue at EU level. A number of topics such as training and health and safety at work are of common interest to hairdressers and beauticians, however the representation of beauticians throughout Europe is still to be analysed.

The committee meets up to six times a year, in biannual plenary meetings and dedicated working groups, and it has been holding additional negotiation meetings on training and health and safety issues.</td></tr>
<tr><th colspan="2">RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:</th></tr>
<tr><td>Negotiations on health protection (ongoing)</td><td>2009</td></tr>
<tr><td>Agreement on the implementation of the European hairdressing certificates</td><td>2009</td></tr>
<tr><td>Declaration on the development of professional hairdresser training in Europe</td><td>2005</td></tr>
<tr><td>Covenant on health and safety, in particular the use and handling of cosmetic products and their chemical agents.</td><td>2005</td></tr>
<tr><td>'How to get along code' - code of conduct and guidelines for European hairdressers</td><td>2001</td></tr>
<tr><td>The European hairdressing certificate - guidelines for European hairdressers</td><td>2000</td></tr>
</table>

Challenges and perspectives

Postal services in the EU have been gradually liberalised since 1997 when a Directive opened about 3% of the regulated national mail services markets to competition. Subsequent directives have led to the progressive liberalisation of the postal sector, with full market opening planned for 2010 ([36]).

The need for all of the traditional postal operators to increase productivity, respond to changes in demand brought about by technological progress and greater competition, and cope with the consequences of liberalisation within the EU, has generally had the effect of engendering large-scale processes of corporate restructuring and reorganisation of production and service delivery. A further fall in mail volumes due to the economic crisis has reinforced the ongoing restructuring trends in the sector. This has led to substantial investments in information and communication technology (ICT) intended not only to rationalise administration, classification and sorting activities, but also to organise the entire service more efficiently, starting from mail delivery.

It should be pointed out that the liberalisation process concerns 'national post activities', that is, the collection, classification, transport and delivery – domestic or international – of postal items, not 'courier activities other than national post activities'. The latter have developed freely and competitively to a large extent outside the public system.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including the evolution of the sector, corporate social responsibility (CSR), accident prevention, promotion of social dialogue and training and lifelong learning.

Corporate social responsibility

The committee has a specific working group on this issue. As part of a project which received EU financial support, it produced a communication toolbox including a special brochure about CSR activities in the postal sector with a focus on diversity.

As a follow-up to this project, which was finalised in 2008, the committee worked on identifying new areas of diversity and communication policies by means of a questionnaire sent out in the first half of 2009.

Accident prevention

A questionnaire launched the work process in this area, followed by a seminar in 2008, which allowed for an initial exchange of experience not only between social partners, but between experts in the field. The committee's work takes into consideration the Community Strategy 2007 – 2012 on Health and Safety at Work - Occupational Health.

The working group has drafted a joint declaration that was adopted in June 2009. In their declaration, the social partners commit to further work on the issue of accident prevention and express their conviction that a shared responsibility of companies, employees and their unions is called for to prevent accidents. The new issues to be discussed during the following years were debated, with two subjects emerging: slips and falls and musculoskeletal disorders linked to them, as well as benchmarking the occupational health organisations within national postal companies.

Promotion of social dialogue

In order to facilitate the working of the postal services sectoral social dialogue committee and to promote the outcome of its dialogue, the committee launched the first sectoral social dialogue website in 2004. It aims to encourage and facilitate a continuous exchange of opinions between the social partners at European level and provides timely and useful information to national members about past and ongoing activities of the committee. http://www.postsocialdialog.org/

Training and lifelong learning

In 2006, the social partners adopted a joint declaration on training and skills development in the postal sector, focusing on new technologies, adaptation to change, training methods and techniques. They are closely monitoring the implementation of this declaration.

They also finalised an EU-financed project in 2008, which aimed to increase understanding of the European Qualifications Framework (EQF) and analyse how the committee's work can fit into this European Framework. Both sides committed to follow-up on the implementation of the declaration on training signed in 2006. The next steps will be the identification of key skills in the sector and the validation of qualifications within the EQF.

As a follow-up in 2009, the training working group:

- contributed to the social observatory project (see below) by giving input on skills issues;
- explored other financing possibilities for actions in other Commission programmes such as Leonardo or Grundtvig.

The evolution of the postal sector

The Committee has built a social observatory of postal sector evolution based on national case studies conducted within a project of the same name. New Member States were encouraged to play a major role in this project by participating in the case studies and hosting the seminars where these were discussed. A final conference was organised in October 2009 to present the results.

This project aimed to observe in detail the employment and human resource conditions and tools for social success linked to the evolution of the postal sector. About nine willing countries and their national social partners participated, including new Member States, in a highly representative panel.

([36]) 2012 for certain Member States.

Current work programme

The social partners in this committee are working towards:

- the implementation of a communication action plan for the social dialogue committee going beyond the existing common postal sector social dialogue website and including making the results of the committee's work more visible to the European institutions beyond the Employment, Social Affairs and Equal Opportunities DG, and to the public in general;
- the creation of a forum with alternative operators;
- follow-up to the 'social observatory of the postal sector evolution' project.

Spotlight on the sector

<table>
<tr><th colspan="2">SECTOR CLARIFICATION</th></tr>
<tr><td colspan="2">NACE rev.2 classes 53.1-53.2 (mainly equivalent to NACE rev.1.1 class 64.11-64.12) most closely cover the sector, including postal and courier activities. However, the services provided by postal operators may also include communication, logistics, retail, money transmission and other financial services, and many others besides. Indeed, the NACE rev.2 classification has been adapted to allow for a categorisation of activities into 'Postal activities under universal service obligation' and 'Other postal and courier activities'.</td></tr>
<tr><th colspan="2">INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS</th></tr>
<tr><td colspan="2">Employment in the postal sector accounts for some 2 million people in more than 30 000 enterprises. In all, 97% of the postal workers have an employee status and full-time work is predominant (79%). Women account for 49% of postal workers and 87% of the workforce has a low or intermediate education level.
The effects of liberalisation and restructuring on employment levels have not been uniform. In Cyprus, Ireland and Slovenia, for example, employment has increased as a result of an expansion of services ([37]). Across the EU, however, employment at incumbent postal operators declined by almost 8% between 1997 and 2006 ([38]).</td></tr>
<tr><th colspan="2">SOCIAL PARTNERS</th></tr>
<tr><th>WORKERS' REPRESENTATIVES</th><th>EMPLOYERS' REPRESENTATIVES</th></tr>
<tr><td>• UNI europa is a part of UNI global union which represents around 1 000 trade unions in 140 countries and 7 million workers in 330 European trade unions. As the European trade union federation for services and communication, it is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including postal services, for which it has a specific section. UNI europa has members in each EU country.</td><td>• The Association of European Public Postal Operators (PostEurop) represents members from 48 European countries, including the EU, Turkey, Croatia and the EFTA countries. PostEurop is recognised by the Universal Postal Union (UPU).</td></tr>
<tr><td colspan="2">Representativeness studies for the European postal services sector were conducted in 1999 by the European Commission in cooperation with the Université Catholique de Louvain, and in 2007 by Eurofound in cooperation with the University of Vienna. These studies confirmed the representativeness of the above organisations for the sector.</td></tr>
<tr><th colspan="2">SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES</th></tr>
<tr><td colspan="2">In 1994 Uni europa (then Euro-FIET) and PostEurop established a joint committee on postal services which was transformed into a sectoral social dialogue committee in 1999. It meets up to eight times a year, in biannual plenary meetings and dedicated working groups.</td></tr>
<tr><th colspan="2">RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:</th></tr>
<tr><td>Joint declaration on accident prevention in the postal sector</td><td>2009</td></tr>
<tr><td>Joint declaration on training and skills in the postal sector (follow-up on joint project)</td><td>2008</td></tr>
<tr><td>Joint declaration on the evolution of the postal sector</td><td>2007</td></tr>
<tr><td>Joint declaration on training and skills development in the postal sector</td><td>2006</td></tr>
<tr><td>Joint statement of the EU social partners in the postal sector on corporate social responsibility</td><td>2005</td></tr>
<tr><td>Common postal sector website: "Social dialogue online - PostSocialDialogue"</td><td>2004</td></tr>
</table>

([37]) EIRO report 2007 "Industrial Report in the Postal sector" http://www.eurofound.europa.eu/eiro/studies/tn0704018s/tn0704018s.htm
([38]) ECORYS study "Main developments in the postal sector (2006-2008)" http://ec.europa.eu/internal_market/post/doc/studies/2008-ecorys-final_en.pdf

Challenges and perspectives

The private security sector is experiencing growth, particularly in the new Member States. A key driver of this development is the growing demand for security services, especially at sea and airports and for private clients. In addition, there is increasing outsourcing of security services by public authorities, banks and stores to private sector security firms. However, certain activities are declining as a result of technological developments and the greater use of electronic transactions.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including integrating organisations from the new Member States, sectoral policy, training and working conditions.

Integrating organisations from the new Member States and associated countries

On the basis of a Slovenian initiative, CoESS and UNI europa have made efforts to integrate representative organisations from the new Member States into their structures and their work. They are currently working on strengthening social dialogue in Bulgaria, Croatia, Hungary, Lithuania, Poland, Romania and Slovenia.

Sectoral policy

In order to improve the functioning of the internal market and the working conditions, the sectoral committee analysed the national legislation governing cash in transit and is working on further initiatives to accompany the harmonisation of European rules for cash in transit. This covers issues such as licences, day-time transport, armouring and marking of vehicles, training modules and minimum standards on health and safety.

Training

In 2006, the sectoral social dialogue committee adopted a European educational toolkit for three private security activities: mobile patrolling, alarm response centres and airport security. Further work is ongoing concerning the activity of cash in transit.

Working conditions

UNI europa and CoESS want to improve working conditions and to ensure quality and professional work. They give high importance to the fight against undeclared work in this respect and they adopted a joint position against undeclared work in the private security sector.

Current work programme

The private security social partners are currently working on issues of cross-border transport of cash money, social dialogue in newer Member States and candidate countries, the implementation of EU initiatives at national level, the modernisation of work organisation, undeclared work, public procurement, work-related stress and third-party violence.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 80 (mainly equivalent to NACE rev.1.1 class 74.6) most closely covers the sector, including private security activities, security systems service activities and investigation activities.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The EU private security sector employs some 1.2 million workers in more than 25 000 undertakings. A total of 96% of private security workers have employee status and full-time work predominates (89%). Most people who work in the sector are men (85%) and have a low or intermediate education level (87%).	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• **UNI europa** is a regional as well as a global organisation. UNI Global brings together around 1 000 trade unions in 140 countries, and is responsible for social dialogue with the corresponding employers' organisations in various areas of activity in the service sector, including private security for which it has a specific section. UNI europa represents 30 trade unions and more than 200 000 members. UNI europa has no private security members in Czech Republic, Cyprus, Latvia, Malta, Slovakia or Slovenia.	• The **Confederation of European Security Services (CoESS)** represents 12 564 companies covering a total of 578 150 employees in EU-25. CoESS has members in 21 of the 27 EU Member States. It is not represented in Greece, Lithuania, Latvia, Malta or Slovakia but has members in Bosnia-Herzegovina, Croatia, Former Yugoslav Republic of Macedonia, Norway, Serbia, Switzerland and Turkey.
A representativeness study for the European private security industry was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2003 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The social partners have been working together inside the structure of an informal working party since 1992 and in the sectoral dialogue committee since 1999 when the internal rules of procedure were adopted. It generally meets three to four times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint statement to the expert group on cross border transport of euro cash	2009
Joint declaration on responsible awarding of contracts	2008
Joint declaration on work-related stress	2008
European educational toolkit for three private security activities/profiles: 1. mobile patrolling, 2. alarm response centres, 3. airport security	2006
Overview of the legislation governing cash in transit in the EU-25	2006
Joint position against undeclared work in the private security sector	2006
Sectoral handbook on social considerations in public procurement	2004
Joint declaration: towards a European model of private security	2004
Code of conduct and ethics for the private security sector	2003

Challenges and perspectives

Professional football is traditionally embedded in the wider football structure typically governed by the main sports-governing bodies and, to some extent, the Member States and social partners. It contributes strongly to the societal role of sport, promoting important values such as team spirit, solidarity, tolerance and fair play, and contributing to personal development and fulfilment.

Rapid professionalisation and commercialisation have accompanied rising popularity and revenues. But combined with the fact that sport itself is subject to Community law where it constitutes an economic activity, this has led to the emergence of many new challenges: determining the place of sport; club licensing systems, financial transparency and club ownership; broadcasting revenues; competitive balance between clubs; corruption, money laundering and other forms of financial crime; but also free movement of sports people (rules such as 'home-grown players' or '6+5'); transfers and contractual stability; player agent regulation; minimum salaries and salary caps; protection of minors; education of players; doping; or racism.

Regarding labour relations, the sector's roots in non-profit organisations and volunteering have slowed the emergence of social dialogue in most Member States. But there is an increasing scope for shaping of employment relations and working conditions in an active and participative way through social dialogue and collective bargaining by employers and players.

European social dialogue: key issues and current work programme

Through their first work programme for 2008 and 2009, the parties aim to strengthen the possibilities of social partners to shape the future developments regarding employment in the sector and to provide a space for different levels of social dialogue. They are currently working on an autonomous agreement for European professional football player minimum contract requirements which would ensure that all professional players' contracts in Europe address all relevant aspects of the employment relationship, including players' and clubs' responsibilities, working time, access to education and training and health and safety.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 93.12 (mainly equivalent to NACE rev.1.1 class 92.62) most closely covers the activities of sport clubs. Professional football is one part of this classification.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
In 2005, it was estimated that there were more than 34.000 professional football players and more than 1.700 professional football clubs in the EU. The precise definition of a professional football player, club and league differs between Member States. Cross-border mobility and staff turnover in the sector are very high. Almost one third of the players in the EU are nationals of another country than the one in which they exercise their profession (including EU and third country nationals). Football players' professional careers are short. The average age of European professional players is around 25.5 years, which raises questions for the protection, training and education of young people and for professional conversion. Salaries range from low levels in lower divisions to very high ones in Europe's top leagues.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **International Federation of Professional Footballers Association**, FIFPro-Division Europe, represents more than 28 000 players in 20 EU Member States.	• The **European Professional Football Leagues Association** (EPFL) represents high-level leagues and clubs associations from 17 EU Member States and more than 600 clubs in the EU. • **European Club Association** (ECA) complements the representation of employers. It represents 144 clubs, 95 of which are in EU Member States. It has at least one member from each EU Member State. Membership depends on the UEFA ranking of its member associations and on other sporting merits.
A **representativeness study** for the European professional football sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2005 and confirmed the representativeness of the above organisations for the sector. Currently, collective bargaining agreements are in place in 12 EU Member States.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The European Social Dialogue Committee was launched on 1 July 2008. Due to the specific governance structure in sport, the social partners agreed to involve the Union of European Football Associations (UEFA) as an associate party in the Committee. The committee meets up to eight times a year, in plenary meetings and dedicated working or steering groups.	

Challenges and perspectives

Rail transport in Europe has seen a worrying decline in modal share for more than 30 years, especially in the area of freight transport. The share of freight transport by rail for all land transport modes (road, inland waterways, rail and pipelines) dropped from 30% in 1970 to 13.2% in 2004, while freight transport by road has tripled in the same period. Passenger transport by rail also declined, though less dramatically: in 1970, the modal share of rail was 10.2% and fell to 6.3% in 2003 in EU-15. The modal share of passenger transport by rail in EU-27 (excluding air and sea transport) dropped from 6.6% in 1995 to 6.1% in 2007. High-speed trains accounted for 4.2% of all rail passenger transport in 1990. In 2004, this share rose to 21.6%.

The main reasons for the decline in rail freight are competition from road haulage and longer delivery times because of the priority given to passenger transport, complicated formalities and cross border differences in infrastructure and staffing. However, the railways have the advantage of being a safe, environmentally clean transport mode and high capacity (one train can contain up to 50-60 truckloads). Revitalising railways is thus a high priority for the EU Common Transport Policy. While the EU is not pursuing privatisation policies in the sector, the Commission encourages competition which stimulates innovation and efficiency.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including notably working conditions.

Working conditions

In 2004, CER and ETF signed two significant agreements. The first concerns working conditions of mobile railway workers assigned to cross-border interoperability services. This seeks to establish common minimum health and safety standards for mobile workers in the European railway freight market. This agreement was transformed into a Council decision in 2005 and applies to all railway undertakings. The second agreement developed a European licence for drivers carrying out a cross-border interoperability service, which is based on common health and safety conditions and common competency standards.

Between 2000 and 2006, the sectoral dialogue committee's working groups carried out several projects which produced reports on the use of new technologies in training, on work organisation, the employability concept, interoperability, the representation of women in the different railway professions and sectoral social dialogue after enlargement.

In 2007, the social partners signed policy orientations on employability and the better representation and integration of women. Both recommendations include a regular follow-up process.

At their 2009 plenary meeting, the signatory parties to the 2004 autonomous agreement on a European drivers' licence, CER and ETF, agreed on a joint declaration on the application of the agreement. The purpose of the declaration is to clarify the application of the agreement against the background of Directive 2007/59/EC on the certification of train drivers which incorporates a large amount of the content of the CER/ETF agreement. The declaration was annexed to the CER/ETF agreement and serves as a guideline for the CER and the ETF members for the application of the agreement.

Current work programme

In 2009, the implementation and follow-up of the two agreements, the attractiveness of the sector and insecurity in the public transport sector are high on the sectoral social dialogue agenda.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 classes 49.1-49.2 (mainly equivalent to NACE rev.1.1 class 60.1) and NACE rev.2 class 52.2 most closely cover the sector, including passenger and freight rail transport as well as relevant support activities.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
Railway services in the EU employ some 900 000 people in almost 900 enterprises (2006). They account for 11% of EU goods transport and 8% of passenger transport (rail, tram and metro).	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Transport Workers' Federation (ETF)** represents some 3 million workers from all transport modes in 39 European countries.	• The **Community of European Railway and Infrastructure Companies (CER)** represents 74 railway undertakings and infrastructure companies from EU-27 excluding Cyprus and Malta where there are no railways but including Bosnia-Herzegovina, Croatia, Montenegro, Norway, Serbia, and Switzerland. • The **European Rail Infrastructure Managers (EIM)** organisation represents 12 independent infrastructure managers' associations in Denmark, Finland, France, Netherlands, Norway, Portugal, Slovenia, Spain, Sweden and UK.
Representativeness studies for the European railways sector were conducted in 2000 by the European Commission in cooperation with the Université Catholique de Louvain, and in 2006 by Eurofound in cooperation with the University of Vienna.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
A joint committee was first established in 1972, followed by a railways sectoral social dialogue committee in 1999, when the internal rules of procedure were adopted. It meets up to six times a year, in plenary meetings and dedicated working groups, and it has been holding additional negotiation meetings on working time issues.	

RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint declaration on the implementation of the agreement on a European licence (annexed to 2004 agreement)	2009
Revised rules of procedure	2007
Joint recommendations for better representation and integration of women	2007
The concept of employability in the railway sector – Recommendations	2007
Joint declaration on internalisation of external cost in transport for an acceleration of Community activities	2007
Common position on the mid-term review of the 2001 White Paper on European Transport Policy	2006
Relations between the European social partners in the railway sector and the European Railway Agency	2006
Final report on 'Representation and better integration of women in the different professions of the railway sector'	2005
Recommendation on the revision of the Eurovignette Directive	2004
Agreement on certain aspects of the working conditions of mobile railway workers assigned to interoperable cross-border services	2004
Agreement on the European licence for drivers carrying out a cross-border interoperability service	2004

Challenges and perspectives

The main EU policy objectives for road transport are to promote efficient road freight and passenger transport services, to create fair conditions for competition, to promote and harmonise safer and more environmentally friendly technical standards, to ensure a minimum level of fiscal and social harmonisation and to make sure that road transport rules are applied effectively and without discrimination.

The existing legislation applying to road transport services establishes common rules on access to the market and to the profession, sets minimum standards for working time, driving and rest periods (including enforcement and the use of tachographs), and establishes minimum annual vehicle taxes and common rules for tolls and user charges.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including economic and sectoral policies, training and lifelong learning and working conditions.

Economic and sectoral policies

The social partners in the road transport sector adopted a joint opinion in 2000 in support of a legislative initiative concerning drivers from third countries driving vehicles registered in the EU and carrying out intra-Community road transport services.

Training and lifelong learning

In 2006 the social partners adopted joint recommendations on employment and training in logistics and defined common criteria for adequate motorway rest facilities.

Working conditions

In the field of local public transport, the social partners adopted recommendations in 2003 relating to insecurity and the feeling of insecurity. The signatories intend to promote social dialogue in undertakings, which appears to be the most appropriate means of bringing about a convergence of interests, trust and transparency.

In 2007 they came to a joint position on articles and aspects of Regulation (EC) 561/2006 (social legislation related to road transport) which according to their assessment required clarification and enforcement guidance. The social partners also adopted a common declaration on illegal employment.

Current work programme

Social legislation, adequate motorway rest facilities and driver training remain high on the sectoral social dialogue agenda.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 classes 49.3-49.4 (mainly equivalent to NACE rev.1.1 class 60.2) and NACE rev.2 class 52.2 most closely cover the sector, including passenger and freight transport as well as relevant support activities.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
Road transport services account for 1.6% of Europe's GDP and they provide jobs for some 4.5 million people in almost 930 000 enterprises in the EU (2006). The entire economy and society depend heavily on efficient road transport which ensures 44% of EU goods transport (by trucks and cars) and 83 % of total EU passenger transport (75% by cars and motorbikes, and 8% by buses and coaches).	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Transport Workers' Federation (ETF)** represents some 3 million workers from all transport modes in 39 European countries.	• The **International Road Union (IRU)** represents members in EU-27. IRU has signed a cooperation agreement with the International Association of Public Transport (UITP) with regard to its participation in the committee.
Representativeness studies for the European road transport sector were conducted in 2000 and 2004 by the European Commission in cooperation with the Université Catholique de Louvain and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The European road transport social partners set up an informal social dialogue in 1965. The road transport sectoral social dialogue committee was formally created in 1999 and the internal rules of procedure were adopted in 2000. It generally meets three to four times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Statement on the economic crisis	2009
Joint press release: social dialogue on logistics	2008
Agreement to work together on the 12-day derogation for coach tourism	2008
Common declaration on illegal employment	2007
Joint position on articles and aspects of Regulation 561/2006/EC requiring clarification and enforcement guidance	2007
Joint press release on rest facilities	2007
Joint statement regarding the proposed Green Paper on Urban Mobility	2007
Joint recommendations on employment and training in logistics	2006
Joint recommendations on employment and training in logistics	2005
Recommendations to the representatives of management and of trade unions in local public transport companies in the European Union	2003
Joint declaration on the road safety action plan	2003
Joint declaration concerning the social dialogue and enlargement	2003
Summary report - Insecurity and the feeling of insecurity on local public transport	2003

Challenges and perspectives

Fishing and aquaculture are important economic activities in the European Union. With a production of almost 7 million tonnes of fish in 2005 from fisheries and aquaculture (around 5% of the world total), the EU is the world's second largest fishing power after China. Yet, while more than 2 million tonnes of fish products were exported in 2006, over 6 million tonnes had to be imported to meet the needs of the EU market, which is one of the biggest in the world. This imbalance between imports and exports resulted in a deficit of over EUR 13 billion for the same year. In contrast to production at world level, production in the EU and the size of the fishing fleet have declined over recent years. Like other fishing industries in the world, the EU fishing sector has to confront a number of challenges, including notably that of over fishing which leads to smaller stocks, smaller landings and smaller incomes, and which is hence the main threat to the future of fish stocks and of the fishing industry itself. Increased competition due to the globalisation of the market in fish products represents an additional challenge.

In 2007 the EU started to develop a new Integrated Maritime Policy for the 21st century looking in particular at key issues such as governance, surveillance and research. The new policy vision is to encompass all aspects of the oceans and seas in a holistic, integrated approach. The intention is to tackle all economic and sustainable development aspects of the oceans and seas, including the marine environment, fishing capacities and resources and modernisation of fishing vessels.

In 2008, special efforts were made to improve maritime spatial planning, offshore renewable energy sources and specific strategies for different regional maritime basins. Common measures have been agreed upon to promote best practices in maritime governance, cooperation and interoperability in the area of maritime surveillance. The importance of developing knowledge and observation networks in sea-related domains in order to further promote maritime research has been acknowledged.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including integration of organisations from the new Member States, health and safety, working conditions, restructuring, and training and lifelong learning.

Integrating organisations from the new Member State and candidate countries

In 2008 the social partners of the fisheries sector launched a project to enhance social dialogue in the new Member States, to define the challenges and to set a future action plan.

Health and safety

One of the most important issues for the social partners was the health and safety situation of the fisheries sector.

In October 2007, the social partners finalised their handbook 'Prevention of accidents at sea and the safety of fishermen'. It is freely accessible on the Internet and aims to reduce the high number of accidents at sea and to increase fishermen's safety onboard by raising awareness of risks. Good procedures and measures are described for managing difficult and life-threatening situations such as drowning and hypothermia. To limit language problems it contains many pictures and only short texts that can be easily understood.

In September 2008 the social partners adopted a joint statement on health and safety aboard fishing vessels. They highlighted the severity of professional risks taken by fishermen and called for new vessels of unrestricted sizes.

Current work programme

Significant issues in the current work programme are the International Labour Organisation Convention on work in the fisheries sector, follow-up measures in the framework of the new integrated maritime policy, health and safety issues, the application of the social clause in fisheries agreements with third countries and mutual recognition of qualifications at EU level. Future work may deal with reinforcing the involvement of organisations from the new Member States and candidate countries, as well as the impact of windmills on fishing activities and the promotion of employment and competitiveness.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 0.3 (mainly equivalent to NACE rev.1.1 class 0.5) most closely covers the sector, including marine and freshwater fishing and aquaculture.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The number of EU fishermen has been declining over recent years. In 2008 some 190 000 workers were employed directly in sea fishing and the EU fleet comprised more than 97 000 vessels, which vary greatly in size and fishing capacity. While providing only a low share of total jobs in the EU and the Member States, fisheries play an important role as a source of employment in some regions, notably in Galicia (Spain), Algarve and the Azores (Portugal), North-East Scotland (UK) and Sterea Ellada, Voreio Aigaio and Notio Aigaio (Greece).	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Transport Workers' Federation (ETF)** represents nearly 3 million workers from all transport modes in 40 European countries.	• **Europêche** is the representative association of national organisations of fishing enterprises in the EU and has member organisations in Belgium, Denmark, Germany, Ireland, Greece, Spain, France, Italy, Malta, Netherlands, Sweden and UK. • The **General Confederation of Agricultural and Fisheries Co-operatives (COGECA)** represents about 30 000 agricultural and fisheries cooperative enterprises and has members in all Member States as well as partner organisations in Iceland, Norway, Switzerland and Turkey. It has a specific fisheries section.
A **representativeness study** for the European sea fisheries sector was conducted by Eurofound in cooperation with the University of Vienna in 2006 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
A joint committee was established in 1974 and the sea fisheries sectoral social dialogue committee followed in 1999. It meets up to six times a year, in biannual plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint letter on the ratification of the ILO Convention n°188	2009
Joint response to the second phase of consultation on reassessing the regulatory social framework for more and better seafaring jobs in the EU.	2009
Joint statement on health and safety aboard fishing vessels: for new vessels of unrestricted sizes	2008
Joint declaration on actions to be taken in the framework of the EU Maritime Policy to improve health and safety onboard fishing vessels	2008
Joint resolution on piracy and aggressions at sea	2008
Joint opinion regarding the Commission's Communication on re-examining the social regulation in the perspective of more and better seafaring jobs in the EU	2008
Replies regarding the Commission document concerning Guidelines on positive environmental initiatives to be taken by the fishing sector and the development project "Guardians of the sea"	2008
Joint letters on the ratification of the ILO Work in Fishing Convention	2007
Joint opinion on rights-based management tools in fisheries	2007
Joint opinion on the policy statement from the European Commission on the fishing opportunities for 2008	2007
Joint opinion on the Green Paper on the Future EU Maritime Policy	2007
Handbook "Prevention of accidents at sea and the safety of fishermen"	2007
Joint position paper on improving the economic situation in the fishing industry	2006
Situation of social partners including socio-economic information of the sea-fishing sector in applicant countries. Estonia, Cyprus, Latvia, Lithuania, Malta, Poland and Slovenia	2004
Joint statement on ILO labour standards for the fishing sector	2004

Challenges and perspectives

Shipbuilding is naturally limited to coastal regions with access to deep water and so restricted to some Member States. Despite a general decline, it remains an important and strategic industry in a number of countries. Shipyards often play a significant role in regional industrial infrastructure and, with regard to military shipbuilding, in national security interests.

The current market situation is marked by unprecedented levels of overcapacity in the global cargo ship fleets, low freight rates and slow recovery from the collapse in orders for shipyards worldwide since September 2008.

Large restructuring has occurred in the shipbuilding sector, due to the globalisation of markets, and 70% of the employment in EU shipyards has been lost since 1975. There has been increased competition from Japan (since the 1950s), South Korea (since the 1970s) and China (since the 1990s), following their modernisation and technological improvements. The global market share of EU yards is about 10% (down from 35% 15 years ago) and ongoing restructuring may result in employment reduction in Spain and Poland.

However, the European shipbuilding industry still accounts for approximately 20% of the world shipbuilding capacity and output in new vessels has remained stable in the last decade at around 4.6 million compensated gross tonnes following significant productivity increases. In order to tackle the restructuring challenges, the European shipyard social partners have, since 2003, been part of a high-level group 'Leader ship 2015' ([39]). This aims at initiating an ambitious programme to ensure long-term prosperity in the industry.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including promoting the industry, restructuring and training and lifelong learning.

Promoting the industry

On 7–11 April 2008, the social dialogue committee organised the European Shipyard Week 2008 on the theme of "Sea Your Future". For the second time, European shipyards and related companies presented their high-tech products and processes, and promoted the wide range of excellent career opportunities resulting from the dynamic evolution in the shipbuilding and ship repair industry.

The committee identified, developed and launched its third joint project with financial support from the European Commission, entitled 'demographic change and skills requirements' in December 2007. The project comprised a research study and a subsequent workshop.

Restructuring

CESA and EMF are preparing a toolbox, containing legal instruments and information about best practice across the EU, for use as a point of reference to deal with cyclical and structural change in the European shipbuilding sector.

Training and lifelong learning

One of the findings of the 'LeaderSHIP 2015' group concerns the need to ensure the development of a skilled workforce to meet new skill requirements. The social partners are working on the themes of skills and qualification shortages and image of the sector, in order to attract highly qualified workers. They have created a dedicated working group on qualification and training in order to exchange good practices, to promote the recognition of qualifications throughout the EU and to support the development of skills, in particular concerning the adaptability of workers and firms to change.

Current work programme

The social partners have agreed to work on issues related to the image of the sector, the European Qualifications Framework, restructuring, worker mobility, new skill requirements and demographic changes.

([39]) The high-level group 'LeaderSHIP 2015' consists of leading personalities (from individual companies, industry associations and trade unions), seven European Commissioners with responsibilities that relate to shipbuilding and two Members of the European Parliament.

Spotlight on the sector

<table>
<tr><th colspan="2">SECTOR CLARIFICATION</th></tr>
<tr><td colspan="2">NACE rev.2 classes 30.1 and 33.1.5 (mainly equivalent to NACE rev.1.1 class 35.1) most closely cover the sector, including the building, repair and maintenance of ships and boats.</td></tr>
<tr><th colspan="2">INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS</th></tr>
<tr><td colspan="2">Over the last 20 years the European shipbuilding sector has undergone far-reaching structural changes. Since the mid-1970s, three out of every four workers employed in the shipyards have been made redundant. Some European countries have abandoned shipbuilding activities altogether. Today, approximately 300 shipyards operate in a maritime industrial network of more than 9 000 companies. The shipbuilding sector employs around 110 000 people directly and European shipbuilding companies and suppliers directly and indirectly employ around 350 000 people.</td></tr>
<tr><th colspan="2">SOCIAL PARTNERS</th></tr>
<tr><th>WORKERS' REPRESENTATIVES</th><th>EMPLOYERS' REPRESENTATIVES</th></tr>
<tr><td>• The European Metalworkers' Federation (EMF) represents 65 metalworkers' unions from 30 countries, with a combined total of 6.5 million members. EMF acts on behalf of unions from all EU Member States as well as from Croatia, Iceland, Montenegro, Norway, Serbia, Switzerland and Turkey. It is a part of ETUC.</td><td>• The Community of European Shipyards' Associations (CESA) represents members in all EU Member States active in the shipbuilding industry, with the exception of Slovakia. CESA also has members in Croatia and Norway.</td></tr>
<tr><td colspan="2">A representativeness study for the European shipbuilding sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2005 and confirmed the representativeness of the above organisations for the sector.</td></tr>
<tr><th colspan="2">SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES</th></tr>
<tr><td colspan="2">The sectoral dialogue committee for shipbuilding was established in 2003 when its internal rules of procedure were adopted. The committee is the first of it its kind in the EU dealing with metalwork. It generally meets four to five times a year, in plenary meetings and dedicated working groups.</td></tr>
<tr><th colspan="2">RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:</th></tr>
<tr><td>Joint project on demographic change and skills requirements</td><td>2007</td></tr>
</table>

Challenges and perspectives

The European steel industry is an indispensable part of the European supply chain, developing and manufacturing thousands of different new steel solutions. It provides the foundation for innovation, durability and energy savings in applications as varied and vital as automotives, construction, medical devices and wind turbines. Steel is 100% recyclable — it loses none of its properties, no matter how many times it is melted down and reused — and therefore contributes significantly to the long-term conservation of fundamental resources for future generations.

The challenges for the EU steel industry are linked to the cost and availability of inputs (raw materials, energy and labour) and to competition from third country producers operating under a different legislative framework. The entry of China into the demand side of the market has pushed input prices to record levels. The strength of EU competitiveness is based on the high quality and added value afforded by the integration, organisation and efficiency of production, skilled manpower and innovation.

European steelmakers have reduced CO_2 emissions by more than 50% since the 1970s and by more than 20% between 1990 and 2005. Emissions from existing technologies for integrated steelmaking have almost reached their minimum, and little further improvement is achievable in the EU without new process technologies. Nevertheless, European steelmakers are committed to further contributing to the EU's climate change objectives, including those in the EU Emissions Trading Scheme (ETS).

Research and development have been promoted in the steel sector by EU financial instruments such as the Framework Programme for Research and the Research Fund for Coal and Steel (RFCS) programme. The Steel Technology Platform (ESTEP) brings together the whole European steel industry, research centres, universities, the European institutions and trade unions, with the objective of defining visions and responses to the strategic challenges up to 2030. The Ultra Low CO_2 Steelmaking (ULCOS) programme, which is one of the proposed topics of ESTEP, aims to develop innovative technologies for the reduction of greenhouse gas emissions by 50% in the medium to long term.

Due to the financial crisis, the outlook is very bleak for almost all sectors using steel. While declining investment and private consumption in the EU and abroad will directly hit construction and automotive demand, the downturn will spread further into the main supplier networks, largely paralysing the steel value chain. Among the major steel producers, this situation has led to blast furnaces being temporarily closed across Europe, and workers being laid off.

In the current climate, closer coordination between industrial needs and legislation is expected to preserve the competitiveness of the European steel industry.

European social dialogue: key issues, recent outcomes and current work programme

By creating the Sectoral Social Dialogue Committee in 2006, EUROFER and EMF have contributed to improving the viability and perspectives of the European sector. To date, a joint position on the Commission's Communication on the EU Emission Trading Scheme has been developed and data has been compiled concerning employment in the European steel industry as well as health and safety statistics. Analysis and discussion of the situation and outlook for the competitiveness of the European steel industry has started and the committee monitors the social, economic and employment consequences of EU policies in the steel sector. Both social partners consider it necessary to pursue this social dialogue in order to bring about improvements for the industry and its employees.

Current work programme

The social partners in this committee are working towards:

- Health and safety: development of a risk assessment matrix for the European steel industry and data collection on health and safety;
- Training: focus on anticipating skills needed in the sector, follow-up of initiatives undertaken by the Commission on education and training and setting up of a small working group to examine future objectives;
- Structural changes: identification of industrial policy instruments for the steel sector, follow-up on climate change policies such as EU ETS and its social and economic impact and the Commission's Communication on the Raw Materials Initiative;
- Compilation of employment figures in the European steel industry;
- Development of joint policy statements on issues such as energy, the environment and raw material policy, aimed at European institutions and joint participation in the consultation process on EU regulation concerning the steel industry.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 24.10 (equivalent to NACE rev.1.1 class 27.1) most closely covers the sector, including manufacture of basic iron and steel and of ferro-alloys.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The European steel industry is the world leader in its sector. Its annual revenues total about €190 billion, it directly employs 420 000 people and it produces more than 200 million tonnes of steel per year. More than 500 steel production sites in 23 EU Member States provide direct and indirect employment and a living for millions of European citizens.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Metalworkers Federation (EMF)** is an umbrella organisation representing 72 metalworking unions (and four associated organisations) from 33 countries with a combined total of 5.5 million members. The EMF was established in 1971.	• **EUROFER**, founded in 1976, and located in Brussels, represents almost 100% of steel production in the EU. Its 60 members are steel companies and national steel federations from throughout the EU. The major steel companies and national steel federations in Switzerland and Turkey are associate members.
A **representativeness study** for the European steel industry was conducted by Eurofound in cooperation with the University of Vienna in 2008 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
On 23 July 2002, the European Coal and Steel Community (ECSC) Treaty expired after 50 years of existence. Since, the commercial policy for steel products is governed by the Treaty establishing the European Community. The sectoral social dialogue committee was set up in 2006.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint statement on the Commission proposal for the revision of the EU Emissions Trading System (EU-ETS)	2008

Challenges and perspectives

The sugar sector underwent massive restructuring stemming from legislative changes within the framework of economic globalisation. The 2006 reforms included the requirement for the elimination of 6 million tonnes of sugar before 2009/2010 which, if not carried out, would lead the Commission to proceed with a mandatory linear reduction of quotas in 2010. Between 2006 and 2008 the elimination of quotas was much lower than expected, indicating that sugar reform in 2007 was aimed at increasing access toEuropean restructuring funds and avoiding a decrease in gross linear quotas in 2010, which would penalise businesses and weaken the industry. A total of 5 573 365 million tonnes ([40]) have been eliminated over four campaigns (2009/2010).

The reduction of European production by 6 million tonnes in 2010 will lead around 47% of factories to gradually close and is likely to result in the direct loss of 25 000 jobs and indirect loss of 125 000 jobs. Beet production will stop in certain European regions; 30 000 farmers have already stopped beet production since 2005, together with Ireland, Lithuania and Slovenia.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including corporate social responsibility (CSR), economic and sectoral policies, health and safety, integrating organisations from the new Member States, restructuring and employability.

Corporate social responsibility

In December 2001, the social partners signed a joint declaration on social responsibility and the social model in the sugar industry. In 2003, CEFS and EFFAT signed a code of conduct establishing minimum standards for CSR in eight areas: human rights, education and training, health and safety, fair pay and working conditions, restructuring and the relationship between social partners. The European sugar industry also expects socially responsible behaviour from its suppliers. The code of conduct includes provisions for implementation and follow-up, and the social dialogue committee has issued six annual reports assessing its implementation. Examples of good practices have been collected and are regularly updated.

Economic and sectoral policies

In 1999, the social partners adopted a joint opinion on the common organisation of the market in sugar and its importance for employment, followed in 2000 by a joint text aimed at the European authorities on the implications for their sector of the Draft Regulation 'Everything but Arms' (EBA). A new joint position on EBA was issued in 2001 after consultation with the Directorate-General for Trade. A joint opinion was signed in November 2001 on the Generalised System of Preferences, emphasising the need to define rules of origin guaranteeing real added value.

([40]) Sugar consultative committee of February 2009

A joint position on preferential rules of origin was adopted in February 2004 where a specific approach was requested for the sugar sector, with a view to reconciling transparency, fair trade and real gains for the beneficiary countries.

Health and safety

Between 1997 and 2000, the sectoral social dialogue committee developed a 'safety kit' containing a database on the relevant European legislation in the field of health and safety. The kit is an evaluation tool to assess the level of safety at processing plants and virtual workshops are held related to different types of work.

Integrating organisations from the new Member States and the candidate countries

A conference in 2002 was specifically dedicated to enlargement issues and a joint declaration was adopted, in which the social partners expressed their intention to lay the foundations for an enlarged Europe, capable of combining a specific social model with economic competitiveness. It was proposed to set up a specific Central and Eastern European ad-hoc group within the framework of the social dialogue committee for the identification and discussion of key issues in this context.

Restructuring

The 2003 code of conduct on CSR deals among other themes with restructuring. The European social partners encourage their affiliate members to go beyond the national and European legislation on information and consultation and to inform and consult their employees in due time on planned restructuring measures. They also recommend measures to improve the employability of workers.

In 2005, the sugar social partners, together with the beet producers (CIBE) organised a conference with the aim of analysing the restructuring taking place in their sector. Furthermore, the sugar social partners have approached the Commission requesting the setting up of an EU restructuring fund for their sector. In December, the social partners issued a guide with the title 'Access to the European structural funds practical guide and directions for use for the European sugar industry'.

Employability

The social partners established a working group on employability in the sugar sector with the aim of deciding upon practical recommendations and encouraging businesses and unions to propose solutions to existing problems in the sugar sector. The first meeting took place on 1 December 2008.

Current work programme

In addition to the above mentioned joint work on employability in the context of the CSR code of conduct, the social partners are closely following issues related to the restructuring of the sector. They are also continuing activities related to developments in EU international trade commitments which could influence the European sugar industry.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 classes 10.81-10.82 (mainly equivalent to NACE rev.1.1 classes 15.83-15.84) most closely cover the sector, including the manufacture of sugar and sugar confectionary.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
For 2009/2010, the European sugar industry is expected to produce more than 14 million tonnes (both sugar and isoglucose) ([41]) following the quota waiver within the framework of the sugar sector reform. European production represents around 80% of domestic consumption. Once a net exporter, the EU has now become a net importer. The European sugar sector directly employed 37 000 people in 2008 and generates a total of 180 000 jobs when taking into account all indirect jobs such as farmers, subcontractors and transport. The European sugar industry incorporates 142 factories ([42]).	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Federation of Food, Agriculture and Tourism Workers (EFFAT)** comprises 128 national trade unions from 37 European countries, representing more than 2.6 million members. EFFAT is a member of the European Trade Union Confederation (ETUC), and is a regional organisation of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF).	• The **European Committee of Sugar Manufacturers (CEFS)** represents the interests of sugar manufacturers and refiners in 21 Member States (non-sugar-producing Member States are Estonia, Cyprus, Luxembourg and Malta, whereas Ireland, Latvia and Slovenia abandoned production) and in Switzerland.
A representativeness study for the European sugar industry was conducted by Eurofound in cooperation with the University of Vienna in 2007 and confirmed the representativeness of the above organisations for the sector. It generally meets once or twice a year, including one annual plenary meeting.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
An informal social dialogue was established in 1969 and the sugar sectoral social dialogue committee was created in 1999 when it adopted its rules of procedure.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Ongoing project on employability in the sugar sector	2009
Sixth report on the code of conduct on Corporate Social Responsibility	2009
Fifth report on the code of conduct on Corporate Social Responsibility	2008
Fourth report on the code of conduct on Corporate Social Responsibility	2007
Third report on the code of conduct on Corporate Social Responsibility	2006
Joint position on the mobilisation of the European Globalisation Adjustment Fund	2006
Access to the European structural funds practical guide & directions for use for the European sugar industry	2005
Second report on the code of conduct on Corporate Social Responsibility	2005
Brochure on Corporate Social Responsibility and Social Dialogue in the European sugar industry	2004
First report on the code of conduct on Corporate Social Responsibility	2004
Joint position : Commission Green Paper on Preferential Rules of Origin	2003
Corporate Social Responsibility in the European sugar industry: code of conduct and an annex with examples of good practice	2003

([41]) Consultative committee of February - Agri C5-866
([42]) CEFS campaign statistics 2007/2008 EU 27

TANNING AND LEATHER

Challenges and perspectives

The EU is the world's largest supplier of leather but re-exports of leather made out of semi-finished products from other origins are rising, and the trade balance for leather goods is negative due to increasing imports. The main export markets for EU tanners are emerging economies that have developed a large manufacturing capacity for the production of leather articles.

As in many European manufacturing industries, the industry is facing increasing competition from, among others, Asia and the Americas, and employment in the sector has dropped considerably in recent years. In the last decade, the EU tanning and leather industry lost over 30% of its companies. Production and employment in the sector are highly concentrated, with Italy and Spain accounting for the largest shares.

To address the increasing competitive pressures, EU tanners are adjusting their production towards higher-quality output and high-fashion leathers. Investments are being made in environmental protection, waste reduction, recycling, recovery of secondary raw materials, quality and design.

The two main concerns for the industry are access to raw materials and market access which can be difficult due to export bans and restrictions for raw materials or trade barriers (high import duties and tariff and non-tariff measures such as excessive labelling or certification requirements) for finished products, whereas the EU markets place virtually no restrictions on imports. Effective measures to combat counterfeiting are also crucial in order for the sector to remain competitive in the global market place.

The sector is further subject to environmental regulation, notably regarding pollution prevention and control. According to industry estimates, environmental protection costs amount to 5% of all operational costs in the sector. It is also affected by REACH, being an important downstream user of a wide variety of chemical preparations.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue has given scope for action in this sector since 1999. The dialogue has covered a range of issues including economic and sectoral policies, trade negotiations and impact assessments, integrating organisations from the new Member States, training and lifelong learning and working conditions, as well as a code of conduct to promote respect for core labour standards along the supply chain.

Economic and sectoral policies

The social partners closely monitor developments of trade policy issues with an economic and social impact on the sector, such as market access of EU products in third countries, marking of origin, trade development since the end of the quota system, as well as industrial and social measures aimed at improving the competitiveness of the sector. In June 2009, the committee held a joint consultation on trade sustainability impact assessments and ongoing trade negotiations, together with the sectoral social dialogue committees for textile and clothing and for footwear.

Integrating organisations from the new Member States and candidate countries

Social and economic fora are organised on a regular basis, with the member organisations from EU Member States and candidate countries in order to address the social and economic impact of enlargement on the sector and to promote social dialogue in these countries. In 2005, COTANCE and ETUF:TCL, together with EURATEX and later CEC, launched a three-year project to support capacity building for social partners in the new Member States and candidate countries.

Training and lifelong learning

In 2005, a joint working group of experts on education and training was set up with the specific objective of improving the image of the sector in order to attract young people, raising the level of qualifications and enhancing the mobility of workers within the EU. The working group discussed and made recommendations on issues related to qualifications, training possibilities and training needs in the different EU countries and cooperation between national training organisations.

Working conditions

In the European framework agreement/code of conduct, the social partners called on their members to actively encourage companies and workers in their sector to respect core labour standards, reasonable working hours, decent working conditions and fair remuneration in all countries in which they operate. As a follow-up to the code in 2003, COTANCE and ETUF:TCL launched, in cooperation with Social Accountability International (SAI), a project aimed at developing and delivering training and capacity building for improved working conditions in the industry. The results of the project were presented at a conference in 2004 and the social partners have decided to organise training activities in countries beyond the EU to ensure the effective implementation of the code all along the supply chain. In 2009, Cotance and ETUF:TCL also decided to join the European Agency for Safety and Health at Work's "Healthy Workplaces Campaign".

Current work programme

The committee is currently working on vocational training, enlargement and sustainable development. On sustainable development, they have adopted a framework for sustainability reporting for the sector and have recently agreed to include a social clause in a European model contract for the supply of hides and skins.

Spotlight on the sector

SECTOR CLARIFICATION	
NACE rev.2 class 15.1 (mainly equivalent to NACE rev.1.1 classes 19.1-19.2) most closely covers the sector, including tanning and dressing of leather, and manufacture of luggage, handbags, saddlery and harnesses.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
In 2006, the EU tanning and leather industry employed 52 000 workers. Of these, 88% have employee status and full-time work predominates (90%). Moreover, 54% of the workers are women and 97% of the workforce has a low or intermediate education level. In 2006, some 3 700 companies operated in the EU tanning and leather industry. In recent years, the number of enterprises and jobs has generally decreased. Tanneries in the EU are typically family-owned, small and medium-sized enterprises and regional concentration is strong. The sector is concentrated in the south of the EU, and the socio-economic life of certain regions depends largely on the tanning and leather industry. Within the EU, the contribution of several new Member States to the sector in terms of employment is much higher than in terms of turnover or added value, due to higher labour intensity in those countries.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Trade Union Federation: Textile, Clothing, Leather (ETUF:TCL)**, represents 70 trade unions in 40 European countries and has at least one member in each Member State, with the exceptions of Luxembourg and Ireland. ETUF:TCL represents more than 1.2 million workers and is a member of ETUC and the International Textile, Garment and Leather Workers' Federation (ITGLWF). Maghreb Unions were granted observer status in 2003.	• The **European Confederation of National Associations of Tanners and Dressers, (COTANCE)** represents national tanners' associations of 13 EU Member States: Belgium, Germany, Greece, Spain, France, Italy, Hungary, Netherlands, Portugal, Slovenia, Finland, Sweden and UK. It has associated members in Norway and Switzerland.
A **representativeness study** for the European tanning and leather industry was conducted by Eurofound in cooperation with the University of Vienna in 2008 and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
The sectoral social dialogue committee in the tanning and leather sector was established in 2001 and activities had taken place within an informal working group since 1999. The internal rules of procedure were adopted in September 2004. It generally meets three to four times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint statement on the deforestation of the Amazon rainforest	2009
Joint declaration on the EU Origin Marking Scheme	2006
Guide on social and environmental reporting	2004
EU Spring Summit : contribution of the social partners	2004
European Framework Agreement/code of conduct in the sector	2000
Programme of social action	2000
Contribution to the preparation of the new social policy agenda	2000
Contribution to the Lisbon Summit	2000
Joint declaration on training	2000
Code of conduct in the tanning and leather sector	2000

Telecommunications make up the largest part of the information and communication technology (ICT) sector. The telecommunications sector has evolved away from monopoly and towards competitive market structures. Together with technological innovation and creation of new services and products, this has brought about large-scale restructuring over the past two decades with the aim of streamlining activities and increasing efficiency. Former state-owned operators still have a large role in the industry, though they are increasingly being challenged by new firms.

During the 1990s, the EU legal framework gradually opened the sector up to competition, culminating in a new regulatory framework in 2002. The Telecoms Reform Package, presented in November 2007, changed the rules laid down in 2002. A main aim was to further encourage competition, particularly by giving national regulators the possibility of separating dominant operators.

The EU ICT sector in general represents around 5.3% of GDP in 2007 but it accounts for a much larger share of overall productivity growth thanks to its role in boosting innovation throughout the economy. The contribution of ICT industries as a whole is important for the competitiveness of a downstream industry such as telecommunications. ICT goods account for a substantial share of total trade between the EU and its economic partners. Such goods represent 10.2% of EU exports, with telecommunication equipment making up a large part.

Re-organisation in the sector led to an increase in labour productivity and a decline in employment. Improvements in the quality of telecommunication networks have reduced the need for traditional maintenance and repair skills while increasing demand for new skills such as computer and electronic engineering, marketing and finance. The sector in the EU has benefited from the availability of a workforce with the required competence in these areas and this trend is expected to continue.

There are no major structural problems and the foundations of the sector are robust. It has thus remained largely unaffected by the economic crisis and is expected to grow by 0.4% in 2009. Telecommunications remains a particularly dynamic service sector in the EU, with added value growth rates of 7% although service firms are experiencing something of a slow down. New services, specifically mobile and fixed broadband, are the main areas of growth in the telecommunication service sub-sector.

European social dialogue: key issues, recent outcomes and current work programme

Anti-discrimination

A 2004 survey on the extent to which telecommunications companies combat discrimination and encourage diversity in the workplace led the social partners to conclude that companies could do much more, especially in terms of setting targets and devising activities to encourage diversity.

In 2005, the social partners completed an initial audit of company practice and policies on diversity. The social dialogue committee published details of the good practices identified. A seminar was also organised to share this information and encourage companies to adopt such practices.

Telework

Discussions between ETUC, UNICE/UAEPME and CEEP led to the signature of a framework agreement on telework in 2002. Prior to this, the social partners in the telecommunications sector adopted guidelines for telework, highlighting issues including the voluntary nature of telework, the principle of equitable treatment, costs involved, necessary equipment and confidentiality issues. The guidelines are regularly monitored and a survey related to them and involving people from large companies has been completed.

Training and lifelong learning

In 2000 the sectoral social dialogue committee adopted a declaration on work organisation and necessary skills for transformation, growth and competitiveness in the information society. In this, they affirmed their commitment to raising awareness of information technologies and developing pan-European training and qualifications to support skills development. A conference on the subject was held in 2001.

The partners are now exploring ways to follow up on these initiatives. Both sides have acknowledged the importance of these subjects. Future employment prospects in the sector will depend on the skills available on the labour market. There is also a pressing need to define the competences which will be required in the telecommunication sector in the future. In addition, the social partners are trying to encourage women and young people into the sector as well as highly skilled third country nationals.

Working conditions

In 2004 ETNO and UNI europa Telecom adopted guidelines for telecom companies and unions which employ people or have members working in call centres. The guidelines addressed the need to improve employment conditions in the centres. Subjects identified as having a bearing on this include training, management, health and safety, discussions on strategy, work organisation, diversity, collective rights and respect of core labour standards.

The partners have recently carried out a survey of companies on the implementation of these guidelines.

Health and safety

The telecom social dialogue committee is the only such committee to have carried out research on musculoskeletal disorders. Together with the committee on agriculture, it adopted a joint declaration on the issue.

Current health and safety work includes a project entitled "Good work, good health", focused on company practices dealing with mental health. This aims to focus specifically on good practices in telecommunications companies throughout Europe.

Current work programme

The social dialogue committee is currently examining issues such as training, health and safety and in particular stress and mental well-being, musculoskeletal disorders, diversity, corporate social responsibility, restructuring and EU enlargement. It may also consider addressing the broader evolution of the sector of information and communication technology services.

Spotlight on the sector

SECTOR CLASSIFICATION	
NACE rev.2 class 61 (mainly equivalent to NACE rev.1.1 class 64.2) most closely covers the sector, including wired, satellite and other telecommunications activities and maintenance of the network.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
Some 1.4 million people are employed in telecommunications services in the EU, of whom 95% have employee status. In all, 35% of the workforce is female and 35% has a high education level. The sector is characterised by a relatively small number of very large firms, many of which were parts of former state monopolies. However, 84% of telecommunications businesses are micro-enterprises. This is characteristic of newcomers to the industry and particularly Internet service providers. Manufacture of telecommunications equipment is the most concentrated sub-sector in ICT manufacturing. Firms with over 250 employees employ 75% of all employees in the industry. Although the ICT services industry is less concentrated than manufacturing, telecommunications is the most concentrated ICT services sub-sector. Only 2% of firms account for 95% of added value and 90% of employees.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• **UNI europa** is part of **UNI global union** which represents around 1 000 trade unions in 140 countries and 7 million workers in 330 European trade unions. As the European trade union federation for services and communication, it is responsible for social dialogue with employers' organisations in numerous areas of the service sector, including telecommunications, which is covered by its ICTS (Information and Communications Technology Services) section. Uni europa has members in all EU countries. The number of affiliated workers in the telecom sector is about 615 000.	• The **European Telecommunications Network Operators' Association (ETNO)** represents businesses rather than employer organisations. The main activities of affiliated enterprises, in the majority the former national monopoly operators, cover every EU country as well as candidate and EFTA countries.
Represenativeness studies for the European telecommunications sector conducted in 1999 by the European Commission in cooperation with the Université Catholique de Louvain and in 2006 by Eurofound in cooperation with the University of Vienna, confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
In 1990 Uni europa (then Euro-FIET) and ETNO established a joint committee on telecommunications which was transformed into a sectoral social dialogue committee in 1999. It meets up to six times a year, in biannual plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Diversity at work – Review of good corporate practices	2007
Musculoskeletal disorders - Introduction and review of good working practices in telecom (end result of joint project)	2007
Joint statement on EC proposals revising the regulatory framework for electronic communication networks and services	2007
Joint statement on the social and economic aspects of corporate social responsibility	2007
UNI europa Telecom/ETNO Good practice guidelines for the prevention of musculoskeletal disorders within the telecommunications sector	2005
UNI europa Telecom/ETNO Guidelines on customer contact centres	2004
Joint statement on EU enlargement	2003

Challenges and perspectives

The recruitment and temporary employment sector is one of the main service sectors extensively used by EU industry. Its economic importance derives from its relative share in employment and important connections to the rest of the economy. In 1997, the International Labour Organisation effectively abandoned its restrictive policies toward private employment agencies. Since then, the sector has grown steadily due to growth in overall demand and outsourcing of functions previously performed in-house by companies. The importance of structural change to the sector reflects its role in outsourcing. Private employment agencies have a specific role in assisting business in adapting to structural change and changing labour requirements.

However, annual changes are highly responsive to business cycles and reduced demand due to the economic downturn has had an immediate impact on the sector, since it is not simply able to operate at a lower production level until demand recovers. Actors are likely to suffer from a downturn in demand from industrial clients as a result of a drop in output, with temporary workers the first to be shed. On the other hand, as industry-related services are not very capital-intensive, they should not suffer unduly from the financial crisis. It is also possible that as a result of the downturn, many companies under financial pressure may outsource activities previously conducted in-house. This could lead to growth in the medium to long term.

Many services provided by temporary agencies require proximity to the client and there is little direct cross-border service provision. Geographical distribution is only partially linked to industrial distribution, since the sector also provides services to non-industrial clients. Employment levels also reflect the degree to which services have been outsourced. This varies between industries and Member States.

The development of EU-wide industry standards is at an early stage and national measures generally have more impact than EU measures on service markets. This is largely due to national policies affecting labour costs and conditions in areas such as income tax, social security, minimum wage legislation and employment. Business service sectors can also be affected by sector-specific regulations that can differ across Member States. A high degree of regulation mostly goes hand in hand with a high level of market concentration.

Labour force and skills and their linkage with underlying demographic change present important challenges. A shrinking workforce raises difficulties in securing a sufficient volume of labour. For private employment agencies, the difficulty that their clients face in recruiting is reflected in the fact that this is the fastest growing segment of the employment agency business in Europe. In this respect, demographic change and changing skills needs and availability are important opportunities.

European social dialogue: key issues, recent outcomes and current work programme

Sectoral social dialogue was suspended between July 2000 and June 2001 in the light of cross-industry negotiations on a framework agreement on temporary work. After the failure of these negotiations, sectoral social dialogue resumed in order to negotiate a joint declaration on the Commission's Proposal for a Directive on Temporary Work. Since then the main areas of work for the social partners have been working conditions and striking a balance between flexibility and worker safety.

Flexibility and security

A declaration was signed in October 2001 in which the social partners expressed support for the development of a legal framework aimed at striking the appropriate balance between flexibility and worker safety. In March 2007, the social partners adopted a joint declaration on the issue.

Working conditions

In May 2008, with the revival of the debate on the Commission's proposal for a Directive on working conditions for temporary workers, Eurociett and UNI europa agreed on another joint declaration on the draft Directive. Their joint opinion was taken into account in the discussions in the Council and Parliament who adopted Directive 2008/104/EC on temporary agency work on 19 November 2008.

Current work programme

In their current work programme, the social partners in the sector have agreed to address the following issues: first, labour market policies, and in particular flexicurity, labour migration (including a European Observatory on cross-border activities within temporary agency work), and vocational training; second, promotion of national social dialogues; third, temporary agency work regulation, covering the full range of temporary agency work labour contracts, the posting of workers directive, ILO convention 181 on private employment agencies and the development of a compendium of best practices and measures for decent work, non-discrimination and equal treatment; and fourth, sectoral developments and the economic situation.

Spotlight on the sector

SECTOR CLASSIFICATION		
NACE rev.2 class 78.2 covers temporary employment agency activities. It includes the activities of supplying workers to clients' businesses for limited periods of time to temporarily replace or supplement the workforce of the client, where the individuals provided are employees of the temporary help service unit. However, units classified here do not provide direct supervision of their employees at the clients' work sites.		
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS		
The employment agency industry is one of the largest private employers in Europe. In 2006, 3.3 million agency workers were employed in full-time daily work. The industry accounts for 1.8% of total European employment, although labour market share varies significantly between Member States, depending on their legal approach. Six European countries account for 85% of the European private employment agency market. More generally, the main service sectors used by industry employ around 14.7 million people and have total revenues of about EUR 1.150 billion. Approximately 20% of total output is used by the manufacturing industry, with the bulk being consumed by other industrial and non-industrial clients. Procurement of such services by the manufacturing industry in Europe is estimated to be worth around EUR 230 billion. In 2005, the business service sector accounted for 8.8% of EU employment and 7% of added value.		
SOCIAL PARTNERS		
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES	
• **UNI europa** is part of **UNI global union** which represents around 1 000 trade unions in 140 countries and 7 million workers in 330 European trade unions. As the European trade union federation for services and communication, it is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including temporary agency work for which it has a specific section (the Information, Business and Information Technology Services (IBITS) section). It has members across the EU except in Greece or the newer Member States.	• **Eurociett** (European Confederation of Private Employment Agencies) represents employers within the committee. Eurociett is the European arm of the International Confederation of Private Employment Agencies (CIETT). Eurociett has members in all EU Member States except for the Baltic States, Bulgaria, Cyprus, Hungary, Malta, Slovakia and Slovenia. It also has members in Norway and Switzerland and includes six corporate members.	
A **representativeness study** for the European temporary agency work sector was conducted by the European Commission in cooperation with the Université Catholique de Louvain in 2004. It confirmed the representativeness of the above organisations for the sector.		
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES		
The sectoral dialogue committee for temporary agency work has been effective since 2000 when the internal rules of procedure were adopted. It generally meets three to four times a year, in plenary meetings and dedicated working groups.		
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:		
Training for temporary agency workers: Joint actions developed by sectoral social partners play a key role in facilitating skills upgrading		2009
Joint declaration on the Directive on Working Conditions for Temporary Agency Workers		2008
Joint declaration within the framework of the "flexicurity debate" as launched and defined by the European Commission		2007
Joint declaration on the Objectives of the European Directive on Private Agency Work.		2001

Challenges and perspectives

The European textile and clothing sector is labour-intensive with lower added value per person employed than for certain other activities. It faces competition from low-cost economies and is undergoing major restructuring due to deregulation, trade liberalisation and technological change. In response, the industry has undertaken extensive sub-contracting or relocation. The 2003 Commission Communication on the future of the textile and clothing sector in an enlarged EU led to the setting up of a High-Level Group with the aim of formulating proposals to improve competitiveness.

The industry is competitive in areas such as technical and industrial textiles, non-woven products and high-quality fashion where demand is growing. Prominent EU brands give a positive worldwide image but this also gives rise to the threat of counterfeiting.

The industry provides employment opportunities in many geographical areas thanks to an array of activities linked to the manufacturing process. It benefits from good access to emerging technologies which facilitate fast adaptation to market needs. At the same time, while the existing workforce is well trained, many enterprises have difficulties recruiting staff with the skills to cope with growing use of new technologies and changes resulting from globalisation.

After China, the EU's textile and clothing sector is the biggest in the world market, representing 29% of global exports. China is the origin of 34% of EU imports. Most of the EU's trade partners maintain high tariffs, and the incidence of non-tariff barriers is growing as a disincentive for SMEs to participate in international trade. Increased access to emerging economies with a growing middle class is of strategic importance, as these represent a quality-conscious market where the EU has a competitive advantage.

The importance of chemicals to the sector presents an environmental challenge. The Integrated Pollution Prevention and Control Directive of 1996 is aimed at considerably reducing pollution from installations such as those pre-treating or dyeing fibres or textiles. SMEs account for many such installations in Europe and over 95% of textile and clothing companies. The REACH regulation is also of concern to the sector.

The clothing sub-sector is oriented towards private consumption. This partly explains the differing impact of the crisis on the two sectors (-1% production for clothing and -8% for textiles in 2008). Recent developments suggest that the textile sub-sector will continue to suffer more than clothing. Average employment losses in the sector in recent years came to about 120 000 posts per year (-5%). This accelerated in 2008 to -7% and the trend is expected to continue.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue within this sector has covered a range of issues, including gender equality, training and lifelong learning, public procurement, trade negotiations and impact assessments, the integration of organisations from new Member States and candidate countries, and working conditions, as well as a code of conduct to promote respect for core labour standards along the supply chain.

Gender equality

In 2000, EURATEX and ETUF:TCL issued an equal opportunities guide related to the employment and working conditions of women.

Integrating organisation from new Member States and candidate countries

EURATEX and ETUF:TCL have organised joint social and economic fora with the objective of addressing the social and economic impact of EU enlargement on their sector and to strengthen social dialogue in new Member States and candidate countries. These took place in 2002, 2004 and 2006. A seminar on social dialogue and fundamental rights was also organised in Turkey in 2000. In 2005 the social partners launched a three-year capacity building project which also involved social partners of the textile/clothing, leather/tanning and footwear sectors in the new Member States and candidate countries.

Public procurement

In order to contribute to ensuring positive and fair outcomes from public procurement procedures related to textile and clothing supply, the sectoral social dialogue committee published a handbook in 2004 for organisations awarding such contracts. The aim of the handbook is to promote transparency and quality criteria. The guide is currently being disseminated in the EU at national-level seminars.

Training and lifelong learning

The social partners are working on the creation of a European observatory for training and employment, including an information and media pool aimed at developing educational material and common qualification standards in order to facilitate mobility and to improve the image of the sector so as to attract young people.

Working conditions

One main outcome of sectoral social dialogue is the 1997 European code of conduct framework agreement in which the partners called on their members to encourage companies and workers to comply with International Labour Organisation (ILO) standards. This agreement was implemented in EU-15 Member States. On the same subject, the social partners and the ILO launched a training project in Turkey in 2004 for managers and workers of about 10 companies. The social partners agreed that representatives from new Member States could sign up to the code and in 2007 they opened up the possibility of applying the code to national collective agreements. In 2008, it was agreed to begin negotiations on updating the agreement.

Trade negotiations and impact assessments

In June 2009, the committee held a joint consultation on trade sustainability impact assessments and ongoing trade negotiations, together with the sectoral social dialogue committees for tanning and leather and for footwear.

Current work programme

The sectoral social dialogue committee is currently working on vocational training, enlargement and restructuring. It closely follows trade issues concerning the sector, such as abolition of quotas, market access of EU products in third countries, marking of origin and the social dimension of trade. The committee also discusses industrial and social measures aimed at improving the competitiveness of the sector. In this context, the committee is currently focusing on the implementation of the recommendations of the High Level Group and follow-up to the Commission Communication 'The future of the Textile and Clothing sector after 2005'. Social partners in the sector are also carrying out a capacity-building project to promote social dialogue at company level through the implementation of REACH.

Spotlight on the sector

SECTOR CLASSIFICATION	
NACE rev.2 classes 13-14 (mainly equivalent to NACE rev.1.1 classes 17-18) most closely cover the sector, including the manufacture and production of textiles and clothing.	
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS	
The textile and clothing sectors account for approximately 4.5% of EU manufacturing production and 7.5% of manufacturing employment. In the EU, the industry employed about 2.4 million workers in 220 000 enterprises in 2006, generating a turnover of about EUR 188 billion annually. Around two thirds of the workforce is female. Moreover, the large majority (90% or more) of the employed in the sector have employee status and are of low to intermediate education level. The vast majority of companies in the sector are micro-companies, with more than 85% of companies employing less than 10 people, and less than 5% employing more than 50.	
SOCIAL PARTNERS	
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES
• The **European Trade Union Federation: Textile, Clothing, and Leather** (ETUF:TCL) represents 70 trade unions in 40 European countries and has at least one member in each Member State, with the exception of Luxembourg and Ireland. ETUF:TCL represents more than 1.2 million workers and is a member of ETUC and the International Textile, Garment and Leather Workers' Federation (ITGLWF). Maghreb Unions were granted observer status in 2003.	• **EURATEX** represents members in 20 of the 27 EU Member States. It is not represented in Cyprus, Lithuania, Luxembourg, Hungary, Malta, Slovakia or Slovenia but has members in Morocco, Norway, Switzerland and Turkey. EURATEX is member of the International Apparel Federation
Representativeness studies for the European textile and clothing industry were conducted in 1999 and 2003 by the European Commission in cooperation with the Université Catholique de Louvain and confirmed the representativeness of the above organisations for the sector.	
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES	
ETUF:TCL and EURATEX have been working together in an informal working party since 1992 and established a sectoral social dialogue committee in 1999 when internal rules of procedure were adopted. It generally meets three to four times a year, in plenary meetings and dedicated working groups.	
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:	
Joint declaration on responsible awarding of contracts	2008
Joint recommendations on "better anticipation and management of industrial change and sectoral restructuring"	2007
Handbook on public procurement	2004
Social action programme	2000
Contribution of social partners to Lisbon Summit	2000
Vademecum: best practices on equal opportunities in the textile sector	2000
Code of conduct of the textile and clothing sector	1997

WOODWORKING

Challenges and perspectives

The EU woodworking industry produces a range of products including sawn wood, wood-based panels, joinery and carpentry products and packaging. The construction industry is the biggest user of wood products in the EU. In this field, wood often finds itself in competition with products made from other materials and a main challenge facing the industry is a need to increase the use of wood and reverse a general trend towards the use of other materials.

The woodworking sector is supported by a dynamic technological base and high-quality innovation and design in both products and processes. Recovery, re-use and recycling of wood present opportunities for increasing the competitiveness of the sector. It can be turned into a renewable energy source as it is carbon-neutral and its use allows for a reduction in the use of sources of CO_2 emissions. However, this also creates the prospect of increasing competition for raw material from the renewable energy sector.

Weaknesses of the sector includes its high fixed and variable costs in terms of labour, raw material, energy, low levels of investment in wood working plants, research and development, and education, training and skills. The sector also has to compete with products from low-cost competitors. Around 10% of the EU industry's raw material is imported and over the last decade, Russia has provided up to 60% of such imports but increasing export taxes have reduced that supply.

In much of the sector, SMEs predominate and such firms are likely to suffer from reduced access to credit due to the financial crisis. This will have negative medium-long-term impacts on innovation, R&D and education. Demand for wooden goods has dropped and is likely to remain at lower levels for one or two years. Increased access to new export markets and cheaper imported commodities may offer some respite. Reduced orders can be mitigated by part-time working and temporary shutdowns in industries such as sawmilling and wooden packaging. In the more capital-intensive panelling sector, shutdowns could be permanent. Sawn wood and panelling production are likely to continue to grow, particularly for export markets.

Competitiveness could be increased through the use of innovative products and systems including wooden composites such as for ecologically sound construction, fittings and consumer products. This kind of innovation increases possibilities for export. Woodworking machine manufacturers and process-control suppliers are also vital for competitiveness through savings in raw material and energy use.

European social dialogue: key issues, recent outcomes and current work programme

European social dialogue within this sector has given scope for action between the social partners since 2000. This has covered a range of issues, including sustainable development, working conditions, education and training and environmental issues.

Sustainable development

In a joint declaration in 1997, the social partners called for the sustainable management of forests, including international coordination and constructive cooperation with producer countries in tropical regions. They stressed the social dimension of the problem and the need to develop jobs likely to contribute to the well-being of the local population. This approach would require regional development and classification of protected forests, those intended for sustainable commercial use and areas reserved for agriculture, industry and infrastructure.

In June 2003, CEI-Bois and EFBWW signed a joint declaration on biomass, which, among other things, opposed any hasty action on incineration of biomass beyond reasonable limits and proposed cooperating with all parties to develop the best possible solutions to climate change.

Working conditions

A major outcome of the woodworking sectoral social dialogue committee was the signature in March 2002 of a code of conduct encouraging companies and workers to comply with International Labour Organisation conventions on core labour standards. European social dialogue since 2000 has also addressed the development of sectoral ethics through the promotion of corporate social responsibility and fundamental rights. In 2008 the social partners established a working group on health and safety.

R&D and innovation

The Wood Group of Forest-based Sector Technology Platform (FTP) is an initiative of CEI-Bois, the Confederation of European Forest Owners, the Confederation of European Paper Industries and the European State Forest Association (EUSTAFOR). It has defined and is implementing an R&D roadmap for the European forest-based sector and has developed sector-specific elements of the Strategic Research Agenda.

Knowledge and skills

The Enhanced Use of Wood Working Group and the industry's "Road Map 2010" identified lack of education and training in the sector as a limiting factor on its growth. In addition, the lack of mutual acceptance of qualifications between EU Member States restricts mobility. Following a detailed survey, work has started under the FTP to rectify this, first at tertiary level, then at technical and operative levels.

Current work programme

The social partners are currently working on issues related to vocational training, health and safety, competitiveness and biomass. They have also launched a project on wood panelling and are looking to collaborate on formaldehyde issues.

Spotlight on the sector

SECTOR CLASSIFICATION		
NACE rev.2 class 16 (mainly equivalent to NACE rev.1.1 class 20) most closely covers sawmilling, planting of wood, manufacture of wood and cork products except furniture, but excluding forestry and logging activities.		
INDUSTRY STRUCTURE AND EMPLOYMENT CHARACTERISTICS		
In 2006 the woodworking industry in the EU employed 1.3 million people, with employment in the sector declining over the last 10 years. In 2008 it fell by 1.9% compared with 2007 levels and is 8% lower than in 2000. In 2003 high-skilled workers accounted for around 9% of the workforce, with low-skilled workers comprising 49% and medium-skilled workers around 41%. There are also many full- and part-time jobs in micro enterprises which appear not to feature in official statistics. The sector comprises 197 000 firms with a total annual turnover of EUR 134 billion and an added value of EUR 37.2 billion. Its company size distribution is skewed towards SMEs. The wood-based panels sub-sector and a handful of sawmills have a few large enterprises. A large part of the technological development within the sector has traditionally been carried out by machinery manufacturers and research centres, such as universities, often under contract to firms and sawmills.		
SOCIAL PARTNERS		
WORKERS' REPRESENTATIVES	EMPLOYERS' REPRESENTATIVES	
• The **European Federation of Building and Woodworkers (EFBWW)** represents 50 affiliated trade unions in the EU with 2.3 million members. It has no members in Cyprus, Estonia, Greece, Lithuania and Malta. EFBWW is a member of the European Trade Union Confederation (ETUC).	• The **European Confederation of Woodworking Industries (CEI-Bois)** represents members in all Member States except Czech Republic, Ireland, Greece, Cyprus, Luxembourg, Malta and Poland and also has members in Norway and Switzerland.	
A **representativeness study** for the European woodworking industry was conducted by Eurofound in cooperation with the University of Vienna in 2006 and confirmed the representativeness of the above organisations for the sector.		
SECTORAL SOCIAL DIALOGUE: KEY OUTCOMES		
The sectoral social dialogue committee in the woodworking sector was established in 2000 and activities had taken place within an informal working group since 1994. It generally meets four times a year, in biannual plenary meetings and dedicated working groups.		
RECENT OUTCOMES OF THE COMMITTEE WORK INCLUDE THE FOLLOWING:		
Joint declaration on the economic situation in the European woodworking sector	2009	
CEI-Bois and EFB WW position paper on the European Commission Proposal for a Directive on Renewable Energy Sources	2008	
Joint declaration on illegal logging	2008	
Joint declaration on biomass	2006	
Biomass combustion beyond reasonable limits	2003	
Code of conduct in the European woodworking industry	2002	

Part III:
Annexes

12. 8. 98 EN Official Journal of the European Communities L 225/27

COMMISSION

COMMISSION DECISION

of 20 May 1998

on the establishment of Sectoral Dialogue Committees promoting the Dialogue between the social partners at European level

(notified under document number C(1998) 2334)

(Text with EEA relevance)

(98/500/EC)

THE COMMISSION OF THE EUROPEAN COMMUNITIES,

Having regard to the Treaty establishing the European Community,

Whereas Article 118b of the Treaty states that the Commission is to endeavour to develop the dialogue between management and labour at European level which could, if the two sides consider it desirable, lead to relations based on agreement;

Whereas point 12 of the Community Charter of the Fundamental Social Rights of Workers states that employers or employers' organizations, on the one hand, and workers' organizations, on the other, should have the right to negotiate and conclude collective agreements under the conditions laid down by national legislation and practice. The dialogue between the two sides of industry at European level which is to be developed, may, if the parties deem it desirable, result in contractual relations in particular at inter-occupational and sectoral level;

Whereas the Commission in response to the Communication of 18 September 1996 concerning the development of the social dialogue at Community level [1] received a strong support from all involved parties in its suggestion to strengthen the sectoral social dialogue;

Whereas the European Parliament, in its Resolution of 18 July 1997 [2], responding to that Commission Communication, called for a specific importance to be attached to the sectoral social dialogue since the impact of regulation and/or deregulation on employment in the economic sectors can best be assessed within the sectoral dialogue;

Whereas the Economic and Social Committee in its opinion of 29 January 1997 [3], responding to that Commission Communication, stated that the sectoral dialogue must be effective, efficient and well-directed;

Whereas the situation in the various Member States clearly demonstrates the need for the two sides of industry to participate actively in discussions on the improvement of living and working conditions in their sector; whereas a sectoral dialogue committee attached to the Commission is the most appropriate means of ensuring such participation, by creating at Community level a representative forum for the socio-economic interests involved;

Whereas the Commission should endeavour to ensure that the membership and the activities of the Sectoral Dialogue Committees contribute to the promotion of equality between women and men;

Whereas the existing Joint Committees should be replaced by the Sectoral Dialogue Committees; whereas the Decisions establishing those Committees should therefore be repealed,

HAS DECIDED AS FOLLOWS:

Article 1

Sectoral Dialogue Committees (hereinafter referred to as 'the Committees') are hereby established in those sectors where the social partners make a joint request to take part in a dialogue at European level, and where the organisations representing both sides of industry fulfil the following criteria:

(a) they shall relate to specific sectors or categories and be organised at European level;

(b) they shall consist of organisations which are themselves an integral and recognized part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States;

(1) COM(96) 448 final.
(2) OJ C 286, 22. 9. 1997, p. 338.
(3) OJ C 89, 19. 3. 1997, p. 27.

(c) they shall have adequate structures to ensure their effective participation in the work of the Committees.

Article 2

Each Committee shall, for the sector of activity for which it is established,

(a) be consulted on developments at Community level having social implications, and

(b) develop and promote the social dialogue at sectoral level.

Article 3

The representatives of the two sides of industry taking part in the meetings of each Committee shall number a maximum of 40 in all, with an equal number of representatives of the employers' and workers' delegations.

Article 4

The Commission shall invite the representatives to participate in the meetings of the Committees on a proposal from the social partner organisations which have made the request set out in Article 1.

Article 5

1. Each Committee shall, together with the Commission, establish its own rules of procedure.

2. The Committees shall be chaired by a representative of the employers' or employees' delegations or, at their joint request, by a representative of the Commission.

3. The Committees shall meet at least once a year. A maximum of 30 representatives drawn from the two sides of industry taking part in a meeting of a Committee shall receive subsistence allowance and travelling expenses.

4. The Commission shall regularly review, in consultation with the social partners, the functioning of the Sectoral Committee and the pursuit of their activities in the different sectors.

Article 6

If the Commission has informed a Committee that a subject discussed relates to a matter of a confidential nature, members of the Committee shall be bound, without prejudice to the provisions of Article 214 of the Treaty, not to disclose any information acquired at the meetings of the Committee or its secretariat.

Article 7

1. The Sectoral Dialogue Committees shall replace the existing Joint Committees, namely:

(a) Joint Committee on Maritime Transport established by Commission Decision 87/467/EEC (1);

(b) Joint Committee on Civil Aviation established by Commission Decision 90/449/EEC (2);

(c) Joint Committee on Inland Navigation established by Commission Decision 80/991/EEC (3);

(d) Joint Committee on Road Transport established by Commission Decision 85/516/EEC (4);

(e) Joint Committee on Railways established by Commission Decision 85/13/EEC (5);

(f) Joint Committee on Telecommunications Services established by Commission Decision 90/450/EEC (6);

(g) Joint Committee on Social Problems of Agricultural Workers established by Commission Decision 74/442/EEC (7);

(h) Joint Committee on Social Problems in Sea Fishing established by Commission Decision 74/441/EEC (8);

(i) Joint Committee on Postal Services established by Commission Decision 94/595/EC (9).

However, the Committees established by those decisions shall remain in office until the Sectoral Committees established by this Decision take office, but in any event no later than 31 December 1998.

2. Subject to Article 1, the Sectoral Dialogue Committee shall also replace other informal working groups through which the Commission has heretofore promoted the social dialogue in certain sectors not covered by a Commission decision establishing a Joint Committee.

3. The Decisions referred to in points (a) to (i) of paragraph 1 are repealed with effect from 1 January 1999.

Done at Brussels, 20 May 1998.

For the Commission

Pádraig FLYNN

Member of the Commission

(1) OJ L 253, 4. 9. 1987, p. 20.
(2) OJ L 230, 24. 8. 1990, p. 22.
(3) OJ L 297, 6. 11. 1980, p. 28.
(4) OJ L 317, 28. 11. 1985, p. 33.
(5) OJ L 8, 10. 1. 1985, p. 26.
(6) OJ L 230, 24. 8. 1990, p. 25.
(7) OJ L 243, 5. 9. 1974, p. 22.
(8) OJ L 243, 5. 9. 1974, p. 19.
(9) OJ L 225, 31. 8. 1994, p. 31.

ANNEX 2: Establishment of sectoral social dialogue committees

FIRST-GENERATION COMMITTEES				
Sectors	Employees	Employers	Former joint committee	Formal Social dialogue
Steel	EMF	Eurofer	1951	2006
Extractive Industries (Mines)	EMCEF	APEP, EURACOAL Euromines	1952	2002
Agriculture	EFFAT	GEOPA/COPA	1964	1999
Road Transport	ETF	IRU	1965	2000
Inland Waterways	ETF	EBU, ESO/OEB	1967	1999
Railways	ETF	CER, EIM	1972	1999
Sea Fisheries	ETF	Europêche/COGECA	1974	1999
Sea Transport	ETF	ECSA	1987	1999

SECOND-GENERATION COMMITTEES				
Sector	Employees	Employers	Informal working group	Formal Social dialogue
Civil Aviation	ETF, ECA	ACI-Europe, AEA, CANSO ERA, IACA, IAHA	1990*	2000
Telecoms	UNI europa	ETNO	1990*	1999
Postal Services	UNI europa	PostEurop	1994*	1999
Banking	UNI europa	FBE, ESBG, EACB	1990	1999
Industrial Cleaning	UNI europa	EFCI	1992	1999
Commerce	UNI europa	EuroCommerce	1985	1999
Construction	EFBWW	FIEC	1992	1999
Electricity	EPSU, EMCEF	Eurelectric	1996	2000
Footwear	ETUF:TCL	CEC	1982	1999
Woodworking	EFBWW	CEI-Bois	1994	2000
Furniture	EFBWW	UEA		2001
Horeca/Tourism	EFFAT	Hotrec	1983	1999
Insurance	UNI europa	CEA, BIPAR, ACME	1987	1999
Live Performance	EAEA	Pearle		1999
Personal Services	UNI europa	Coiffure EU	1998	1999
Private Security	UNI europa	CoESS	1993	1999
Sugar	EFFAT	CEFS	1969	1999
Tanning & Leather	ETUF:TCL	COTANCE	1999	2001
Temporary Agency Work	UNI europa	Eurociett		1999
Textiles/Clothing	ETUF:TCL	Euratex	1992	1999

THIRD-GENERATION COMMITTEES				
Sector	Employees	Employers	Informal working group	Formal Social dialogue
Shipbuilding	EMF	CESA		2003
Audiovisual Services	UNI-MEI, EFJ, FIA, FIM	EBU, ACT, AER, CEPI, FIAPF		2004
Chemical Industry	EMCEF	ECEG		2004
Local and Regional Governments	EPSU	CEMR	1996	2004
Hospitals and Healthcare	EPSU	HOSPEEM		2006
Contract Catering	EFFAT	FERCO	1998	2007
Gas	EMCEF EPSU	EUROGAS		2007
Professional Football	EPFL, ECA	FIFPro		2008
Metal, Engineering and Technology-Based Industries	EMF	CEEMET	2006	2010
Education	ETUCE	EFEE		2010
Central Administrations	TUNED	EUPAN	Test phase since 2008	2010

* Former joint committee.

ANNEX 3: List of sectoral European social partner organisations consulted under Art. 154 TFEU

Sectoral organisations representing employers

- Airports Council International – Europe (ACI Europe)
- Association of Commercial Television in Europe (ACT)
- Association of Mutual Insurers and Insurance Cooperatives in Europe (AMICE)
- Association of European Airlines (AEA)
- Association of European Professional Football Leagues (EPFL)
- Association of European Public Postal Operators (PostEurop)
- Association of European Radios (AER)
- Association of National Organisations of Fishing Enterprises in the EU (EUROPECHE)
- Banking Committee for European Social Affairs (EBF-BCESA)
- Coiffure EU
- Civil Air Navigation Services Association (CANSO)
- Committee of Agricultural Organisations in the European Union (COPA)
- Community of European Railway and Infrastructure Companies (CER)
- Community of European Shipyards' Associations (CESA)
- Confederation of National Associations of Tanners and Dressers of the European
- Community (COTANCE)
- Council of European Municipalities and Regions (CEMR)
- Employers' Group of the Committee of Agricultural Organisations in the European Union (GEOPA)
- Euracoal
- Euromines
- European Aggregates Association (UEPG)
- European Apparel and Textile Organisation (EURATEX)
- European Association of Cooperative Banks (EACB)
- European Association of Potash Producers (APEP)
- European Banking Federation (FBE)
- European Barge Union (EBU)
- European Broadcasting Union (EBU)
- European Club Association (ECA)
- European Committee of Sugar Manufacturers (CEFS)
- European Community Shipowners Association (ECSA)
- European Confederation of the Footwear Industry (CEC)
- European Confederation of Iron and Steel Industries (Eurofer)
- European Confederation of Private Employment Agencies (Eurociett)
- European Confederation of Woodworking Industries (CEI–Bois)
- European Construction Industry Federation (FIEC)
- European Coordination of Independent Producers (CEPI)
- European Federation of Cleaning Industries (EFCI)
- European Federation of Contract Catering Organisations (FERCO)
- European Federation of National Insurance Associations (CEA)
- European Federation of Security Services (CoESS)
- European Furniture Manufacturers' Federation (UEA)
- European hospital and healthcare employers' association (HOSPEEM)
- European Industrial Minerals Association (IMA)
- European Rail Infrastructure Managers (EIM)
- European Regions Airline Association (ERA)
- European Savings Banks Group (ESBG)
- European Skippers' Organisation (ESO)
- European Telecommunications Network Operators' Association (ETNO)
- European Union of the Natural Gas Industry (EUROGAS)
- General Committee for Agricultural Cooperation in the European Union (COGECA)
- Hotels, Restaurants and Cafés in Europe (HOTREC)
- International Air Carrier Association (IACA)
- International Aviation Handlers' Association (IAHA)
- International Federation of Film Producers' Associations (FIAPF)
- International Federation of Insurance Intermediaries (BIPAR)
- International Road Transport Union (IRU)
- Performing Arts Employers' Associations League Europe (PEARLE)
- Retail, Wholesale and International Trade Representation to the EU (EuroCommerce)
- Union of the Electricity Industry (EURELECTRIC)

Sectoral European trade union organisations

- Council of European Employers of the Metal, Engineering and Technology-Based Industries (CEEMET)
- European Arts and Entertainment Alliance (EAEA)
- European Cockpit Association (ECA)
- European Federation of Building and Woodworkers (EFBWW)
- European Federation of Journalists (EFJ)
- European Federation of Public Service Unions (EPSU)
- European Federation of Trade Unions in the Food, Agriculture and Tourism Sectors and
- Allied Branches (EFFAT)
- European Metalworkers' Federation (EMF)
- European Mine, Chemical and Energy Workers' Federation (EMCEF)
- European Trade Union Federation: Textiles, Clothing and Leather (ETUF:TCL)
- European Transport Workers' Federation (ETF)
- International Federation of Actors (FIA)
- International Federation of Musicians (IFM)
- International Federation of Professional Footballers' Associations – Division Europe (FIFPro)
- Union Network International – Europe (UNI europa)
- Union Network International – Media and Entertainment International – Europe (EUROMEI)
- European Trade Union Committee for Education (ETUCE)

SECTOR	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	LAST
Agriculture			EU-15					EU-25					2006
Audiovisual Services						EU-15							2004
Banking		EU-15										EU-27	2010
Central Administrations*					EU-15						EU-27		2009
Chemical Industry							EU-25						2005
Civil Aviation		EU-15								EU-27			2008
Commerce	EU-15				EU-25							EU-27	2010
Construction	EU-15					EU-25							2004
Contract Catering											EU-27		2009
Education**											EU-27		2009
Electricity			EU-15			EU-25							2004
Extractive Industries								EU-25					2006
Footwear											EU-27		2009
Furniture								EU-25					2006
Gas								EU-25					2006
Horeca			EU-15										2009
Hospitals and Healthcare									EU-27				2007
Industrial Cleaning						EU-15							2004
Inland Waterways		EU-15								EU-27			2008
Insurance		EU-15										EU-27	2010
Live Performance						EU-15							2004
Local & Regional Government			EU-15										2001
Metal Industry**											EU-27		2009
Paper Industry**												EU-27	2010
Personal Services			EU-15							EU-27			2008
Postal Services	EU-15								EU-27				2007
Private Security					EU-15							EU-27	2010
Professional Football							EU-25						2005
Railways		EU-15						EU-25					2006
Road Transport		EU-15				EU-25							2004
Sea Fisheries								EU-25					2006
Sea Transport		EU-15							EU-27				2007
Shipyards							EU-25						2005
Steel										EU-27			2008
Sugar									EU-27				2007
Tanning and Leather										EU-27			2008
Telecommunications	EU-15							EU-25					2006
Temporary Agency Work						EU-15							2004
Textile and Clothing	EU-15				EU-25								2003
Woodworking								EU-25					2006

* committee in test phase.
** new sectoral social dialogue committee to be created in 2010.

ANNEX 5: Categories of texts and outcomes ([43]) of the European sectoral social dialogue

Category of texts	Sub-categories	Follow-up measures
Agreements	implementation by directives or Implementation by social partners (Article 155)	implementation reports
Process-oriented texts	framework of actions, guidelines, codes of conduct, policy orientations	follow-up reports
Joint opinions and tools	declarations, guides, handbooks, websites, tools	no follow-up clauses promotional activities
Procedural texts	rules of procedure, work programmes, social partner agreements regarding the functioning of European social dialogue, the representativeness of actors and the composition of social parter delegations	no follow-up clauses

With a view to aiding understanding of the various social dialogue instruments and helping the social partners to improve transparency, the European Commission proposed in 2004 a typology of the results of European social dialogue – summarised in the table above - that identifies four broad categories, each of which has sub-categories: agreements implemented in accordance with Article 154(2); process-oriented texts; joint opinions and tools; and procedural texts ([44]). The Commission encourages the social partners to draw on this typology when drafting their texts.

I. Agreements implemented in accordance with Article 154(2): minimum standards

The texts in this category establish minimum standards and entail the implementation of certain commitments by a given deadline. Article 154(2) makes it clear that two main types of agreement fall within this category, the main difference being related to the method of implementation foreseen.

Agreements implemented by Council decision

The first kind of agreement consists of those which are implemented at the joint request of the signatory parties by a Council decision (thus far in practice by Council directives) following a proposal from the Commission. This category includes the cross-industry framework agreements on parental leave, part-time work and fixed-term contracts, as well as a series of sector-level agreements (see annex 5), including notably the 2008 framework agreement on the Maritime Labour Convention in the maritime transport sector and the 2009 framework agreement on preventing injuries from the use of sharps in the hospitals and health care sector. The three cross-industry framework agreements were negotiated as a result of a Commission consultation under Article 154 TFEU (Art. 138 EC Treaty before), whereas the sectoral agreements usually made use of the space left to the social partners to adapt the EU legislation to the specific needs of the sector.

The responsibility for ensuring that agreements implemented by Council decision are transposed and implemented lies with the Member States, even in cases where the provisions are implemented through collective bargaining by the social partners. Responsibility for monitoring these agreements lies with the Commission, although the social partners are systematically consulted on the implementation reports.

Autonomous agreements

With regard to the second type of agreement – those implemented in accordance with the procedures and practices specific to management and labour and the Member States - it is the social partners themselves who are responsible for implementing and monitoring these agreements. The Framework agreements on telework (2002) and work-related stress (2004) are cross-industry examples of this type of agreement and were the results of Article 154 TFEU (then Art. 138 EC Treaty) consultations. Examples from sectoral social dialogue include the 2006 multi-sectoral agreement on protecting workers against silica crystalline dust and the 2009 agreement on the implementation of the European hairdressing certificates in the personal services sector.

Effective implementation and monitoring is important in the case of agreements of this kind, particularly if they have been negotiated subsequent to a Commission consultation under Article 154 TFEU (before Art. 138 EC Treaty). Article 154(2) TFEU (before Art. 139(2) EC Treaty) states that the Community level agreements "*shall* be implemented" (emphasis added), which implies that there is an obligation to implement these agreements and for the signatory parties to exercise influence on their members in order to implement the European agreement.

II. Process-oriented texts

This category consists of a variety of joint texts which are implemented in a more incremental and process-oriented way than agreements. In these texts the European social partners make recommendations of various kinds to their members for follow-up, and they should involve regular evaluation of the progress made towards achieving their objectives in order to ensure they have a real impact. The implementation of some aspects of these texts may require cooperation with national public authorities.

([43]) This typology does not imply any ranking between outcomes, taking into account that new committees usually first focus on joint opinions and common projects to improve understanding and strengthen trust before possibly envisaging agreements, while long-standing or more experienced committees are more likely to engage in the negotiation of agreements.

([44]) Partnership for change in an enlarged Europe: Enhancing the contribution of European social dialogue, Commission Communication , COM(2004) 557 final, 12.08.2004.

Texts of this kind can be useful in areas in which legislation at European level may not be the most appropriate solution, often because of the complex and diverse array of measures already in place in Member States, but in which the social partners may nevertheless have an interest in working together. They can also assist the exchange of good practice and mutual learning. Such texts sometimes help to prepare the ground for future Community legislation. There are three main types of instrument falling within this category.

Frameworks of action

Frameworks of action consist of the identification of certain policy priorities towards which the national social partners undertake to work. These priorities serve as benchmarks and the social partners report annually on the action taken to follow-up on these texts.

Guidelines and codes of conduct

Guidelines and codes of conduct make recommendations and/or provide guidelines to national affiliates concerning the establishment of standards or principles. In some cases these are intended to serve as principles or minimum European standards to be implemented at national or company level. In other cases they seek to promote higher standards than those provided for in existing legislation. This category also includes codes of conduct intended to promote the implementation in companies' supply chains of existing internationally agreed standards in the area of labour law established by international conventions. The content of some of these codes of conduct goes beyond the core ILO conventions.

Policy orientations

This sub-category refers to texts in which the social partners pursue a proactive approach to promoting certain policies among their members. The texts explain how these will be promoted (e.g. collection and exchange of good practice, awareness-raising activities) and how the social partners undertake to assess the follow-up and impact.

III. Joint opinions and tools: Exchange of information

This category consists of social partner texts and tools which contribute to exchanging information, either upwards from the social partners to the European institutions and/or national public authorities, or downwards, by explaining the implications of EU policies to national members. The instruments in this category do not entail any implementation, monitoring or follow-up provisions.

Joint opinions

This category includes the majority of social partner texts adopted over the years such as their joint opinions and joint statements, which are generally intended to provide input to the European institutions and/or national public authorities. These include texts which respond to an EU-wide consultation (green and white papers, consultation documents, communications), which adopt a joint position with regard to a given EU policy, which explicitly ask the Commission to adopt a particular stance, or which ask the Commission to undertake studies or other actions.

Declarations

This category refers to texts which are essentially declarations – usually directed at the social partners themselves - outlining future work and activities which the social partners intend to undertake (e.g. the organisation of seminars, roundtables, etc).

Tools

This category refers to the tools developed by the social partners, such as guides and manuals providing practical advice to employees and companies on subjects such as vocational training, health and safety and public procurement, often with the assistance of EU grants. These can make a very practical contribution at grass-roots level, for example by helping to explain the implications of EU legislation for certain topics, or helping to exchange knowledge of good practice.

IV. Procedural texts

This final category consists of texts which seek to lay down the rules for bipartite dialogue between the parties. This includes the cross-industry social partners' agreement of 31 October 1991, which made proposals for the revision of the policy-making procedures in the EC Treaty in the social policy field. These proposals were incorporated virtually verbatim into the Treaty on European Union by the Intergovernmental Conference of 1991. This category also includes the social partner texts which determine the rules of procedure for the sectoral social dialogue committees and the joint work programmes of the committees adopted by the social partners, as well as any other agreements by the social partners regarding their representation and composition of their delegations.

ANNEX 6: European sectoral and multi-sectoral social dialogue agreements implemented through EU directives or internal procedures

SECTORS	AGREEMENTS
Hospitals and Healthcare	COUNCIL DIRECTIVE 2010/32/EU of 10 May 2010 implementing the Framework Agreement on prevention from sharp injuries in the hospital and healthcare sector concluded by HOSPEEM and EPSU
Maritime Transport	COUNCIL DIRECTIVE 2009/13/EC of 16 February 2009 implementing the Agreement concluded by the European Community Shipowners' Associations (ECSA) and the European Transport Workers' Federation (ETF) on the Maritime Labour Convention, 2006, and amending Directive 1999/63/EC
	COUNCIL DIRECTIVE 1999/63/EC of 21 June 1999 concerning the Agreement on the organisation of working time of seafarers concluded by the European Community Shipowners' Association (ECSA) and the Federation of Transport Workers' Unions in the European
Railways	COUNCIL DIRECTIVE 2005/47/EC of 18 July 2005 on the Agreement between the Community of European Railways (CER) and the European Transport Workers' Federation (ETF) on certain aspects of the working conditions of mobile workers engaged in interoperable cross-border services in the railway sector
	Agreement on the European licence for drivers carrying out a cross-border inter-operability service, signed on 27 January 2004
Civil Aviation	COUNCIL DIRECTIVE 2000/79/EC of 27 November 2000 concerning the European Agreement on the Organisation of Working Time of Mobile Workers in Civil Aviation concluded by the Association of European Airlines (AEA), the European Transport Workers' Federation (ETF), the European Cockpit Association (ECA), the European Regions Airline Association (ERA) and the International Air Carrier Association (IACA)
Personal Services	Agreement on the implementation of European hairdressing certificates, signed on 18 June 2009
14 Industrial Sectors	Agreement on Workers' Health Protection Through the Good Handling and Use of Crystalline Silica and Products Containing it signed on 25 April 2006

NUMBER OF MEETINGS AND REIMBURSEMENT REQUESTS RELATED TO SECTORAL SOCIAL DIALOGUE COMMITTEE MEETINGS, 2009					
Sectoral social dialogue committee	Number of reimbursements	Plenary meetings	Working or steering group meetings	Negotiation meetings	Total
Agriculture	141	2	4	–	6
Audiovisual Services	140	2	4	–	6
Banking	37	1	3	–	4
Chemical Industry	91	1	3	–	4
Civil Aviation	110	1	6	–	7
Commerce	27	1	8	–	9
Construction	151	2	6	–	8
Contract Catering	35	1	2	–	3
Electricity	67	2	2	–	4
Extractive Industries	66	2	2	–	4
Footwear	8	1	–	–	1
Furniture	36	2	2	–	4
Gas	41	2	2	–	4
Horeca	67	2	2	–	4
Hospitals and Healthcare	151	2	2	6	10
Industrial Cleaning	30	1	1	–	2
Inland Waterways	85	1	3	3	7
Insurance	33	1	2	–	3
Live Performance	113	2	4	–	6
Local and Regional Government	85	2	4	–	6
Maritime Transport	59	1	2	–	3
Personal Services	179	2	3	5	10
Postal Services	139	2	5	–	7
Private Security	58	1	3	–	4
Professional Football	94	1	7	–	8
Railways	90	1	5	2	8
Road Transport	110	1	5	–	6
Sea Fisheries	68	2	3	–	5
Shipbuilding	77	1	4	–	5
Steel	73	2	4	–	6
Sugar	21	1	–	–	1
Tanning and Leather	33	1	2	–	3
Telecommunications	89	2	5	–	7
Temporary Agency Work	65	1	2	–	3
Textile and Clothing	29	–	3	–	3
Woodworking	25	1	3	–	4
LIAISON FORUM	62	4	–	–	4
TOTALS	2785	55	118	16	189

Source: European Commission, DG EMPL/F1.

A maximum of 54 participants are invited to plenary meetings of sectoral social dialogue committees. Average numbers for the period 2003-2008 ranged from less than 20 participants for footwear, tanning and leather, inland navigation and textiles and clothing and less than 25 for the cleaning industry and the commerce sector to 40 or more for postal services, maritime transport, personal services, the chemical industry and professional football (although the latter was not fully representative as only the launch event of the committee could be taken into account) (Chart 7.1).

Low participation rates in some sectors reflect the limited presence of those sectors in EU Member States; this applies to the above-mentioned four sectors with an average of less than 20 participants per plenary meeting. In sectors which are present in all EU Member States, the comparatively low participation rates could be a signal that the involvement of actors needs to be enhanced and/or that the relevance of the agenda and work programme of the committee should be reviewed.

The comparatively high participation rates in some sectors are indicative of the high relevance of the Commission's policy agenda to national social partners. Examples include liberalisation and evolution of postal services, EU legislation on chemical products (REACH) and climate change, active negotiations between social partners in accordance with Art. 155, such as for maritime transport and personal services and the launch of a new committee, in the case of professional football.

The share of women among participants at plenary meetings of sectoral social dialogue committees reflects to a large extent the employment characteristics of each sector (Chart 7.2). It ranges from 10% or less in woodworking, professional football, steel, shipyards and the sugar industry to 40-50% in personal services, commerce, local and regional government and catering, and more than 70% in hospitals and health care.

The share of participants from Member States that joined the EU in 2004 and 2007 respectively (EU-12) is an indicator not only of the importance of a sector in the new Member States and of social dialogue within that sector, but also of the successful integration of the social partners from the new Member States into the existing social dialogue structures. It ranges from less than 10% in footwear, personal services, sea fisheries, the cleaning industry, shipyards, civil aviation, telecommunications, steel, insurance and banking to 25% or more in tanning and leather, textiles and clothing, furniture, railways, catering, extractive industries and inland navigation (Chart 7.3). Social partners in some of the latter sectors, notably tanning and leather and textiles and clothing, have carried out apparently successful, capacity-building projects to foster integration of social partner representatives from new Member States into European sectoral social dialogue structures.

Finally, there is an important difference in the participation of employer and employee representatives across the various committees (Chart 7.4). This may reflect both diverging representativeness structures across sectors (with five or more employer organisations recognised as representative bodies in sectors such as civil aviation, audiovisual services and extractive industries) as well as differences in levels of commitment and mobilisation of one or the other side in a sectoral social dialogue committee. In construction and agriculture, the participation rates significantly favour employers' representatives (accounting for two-thirds or more of the participants in plenary meetings), while in civil aviation, textiles and clothing, shipyards, gas and banking, two thirds or more of the participants are from trade unions.

Chart 7.1:

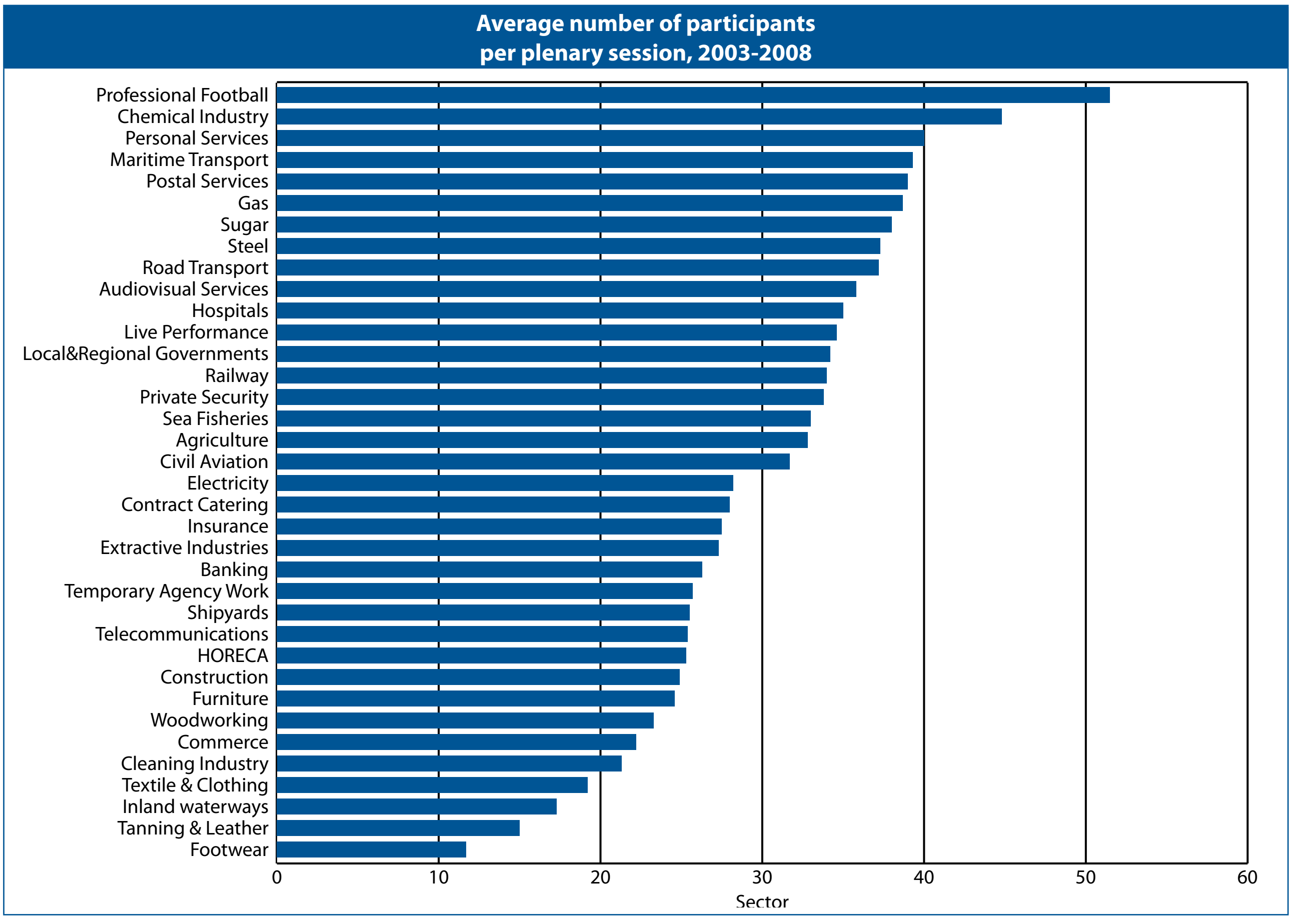


Chart 7.2:

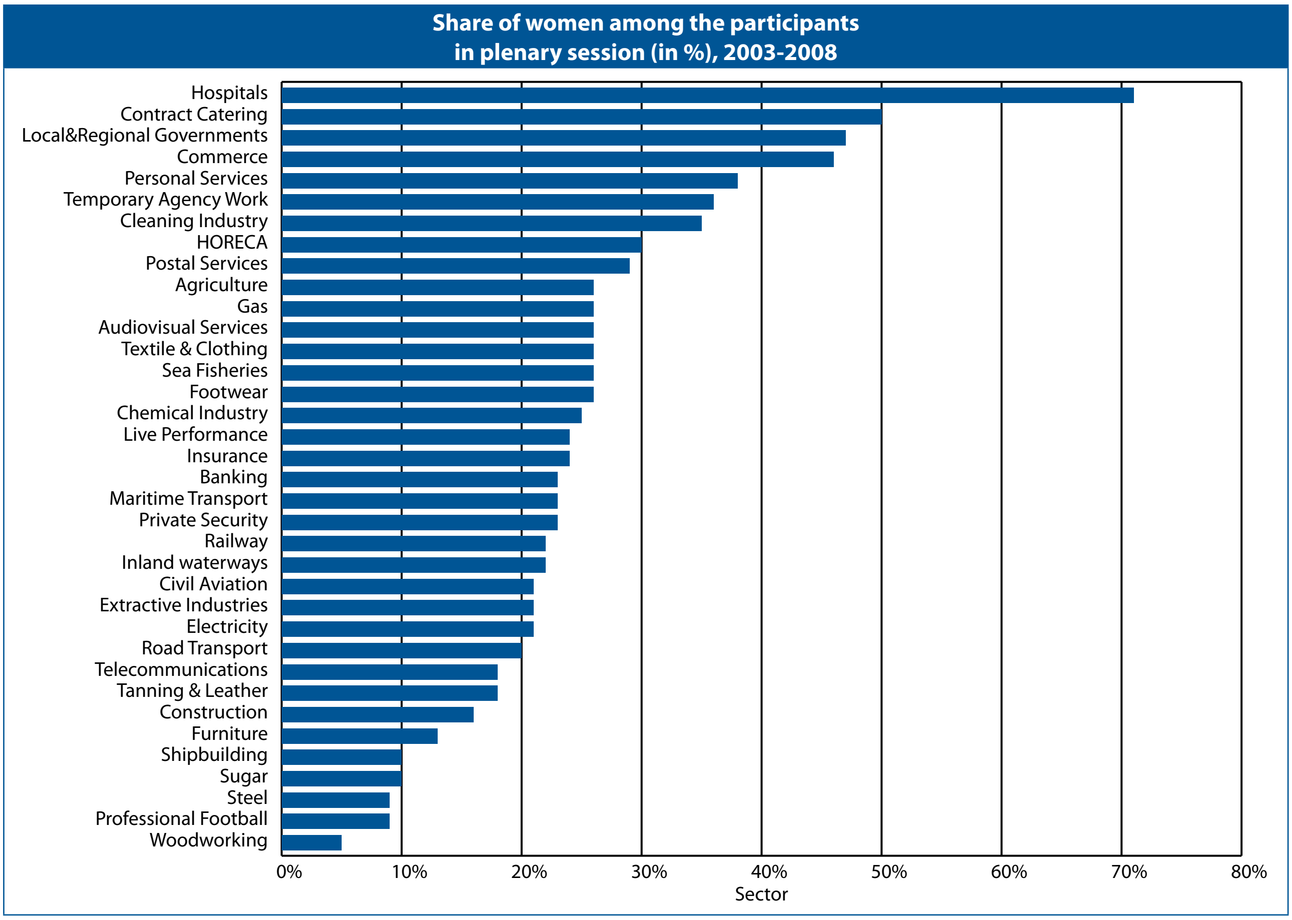


Chart 7.3:

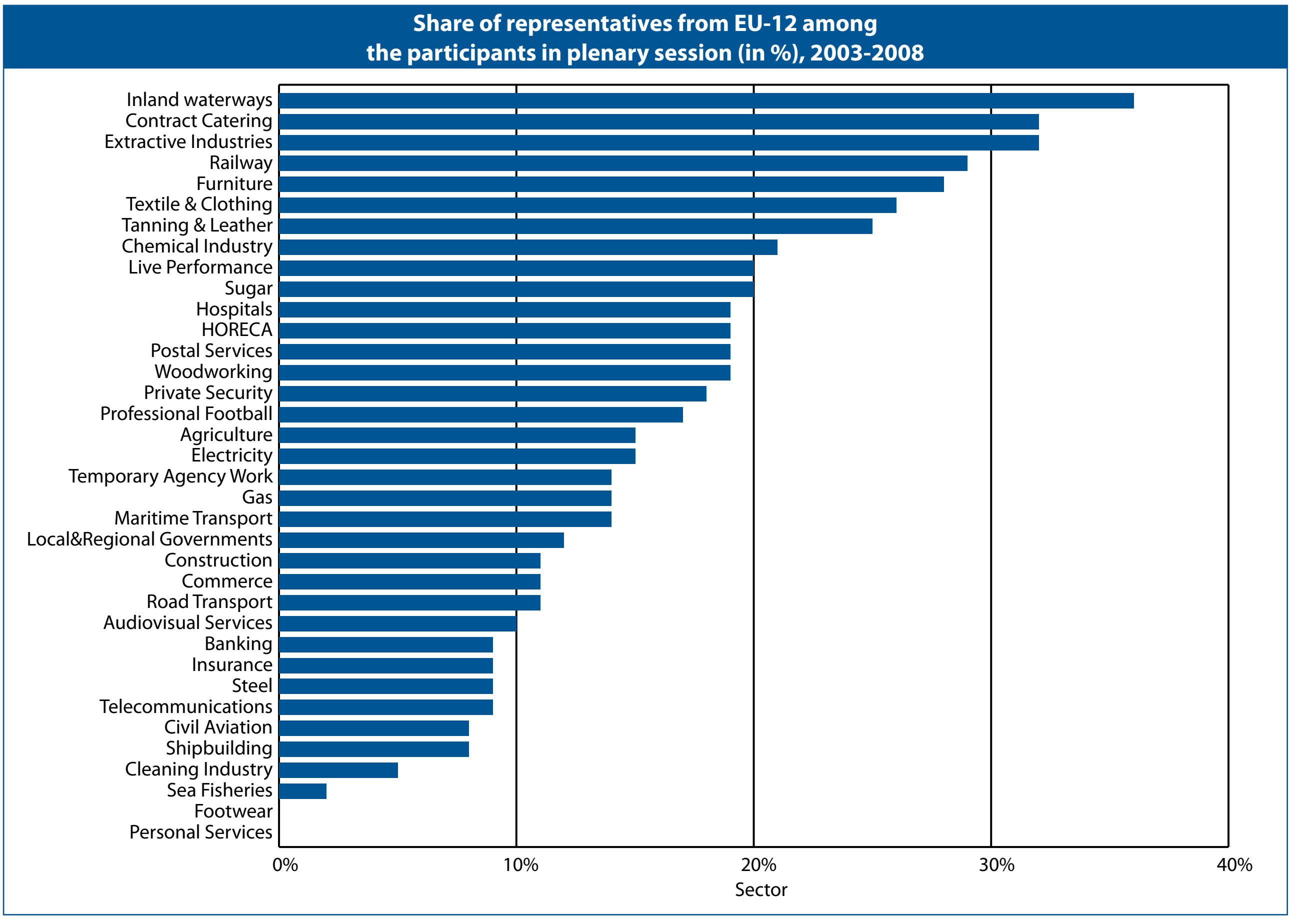
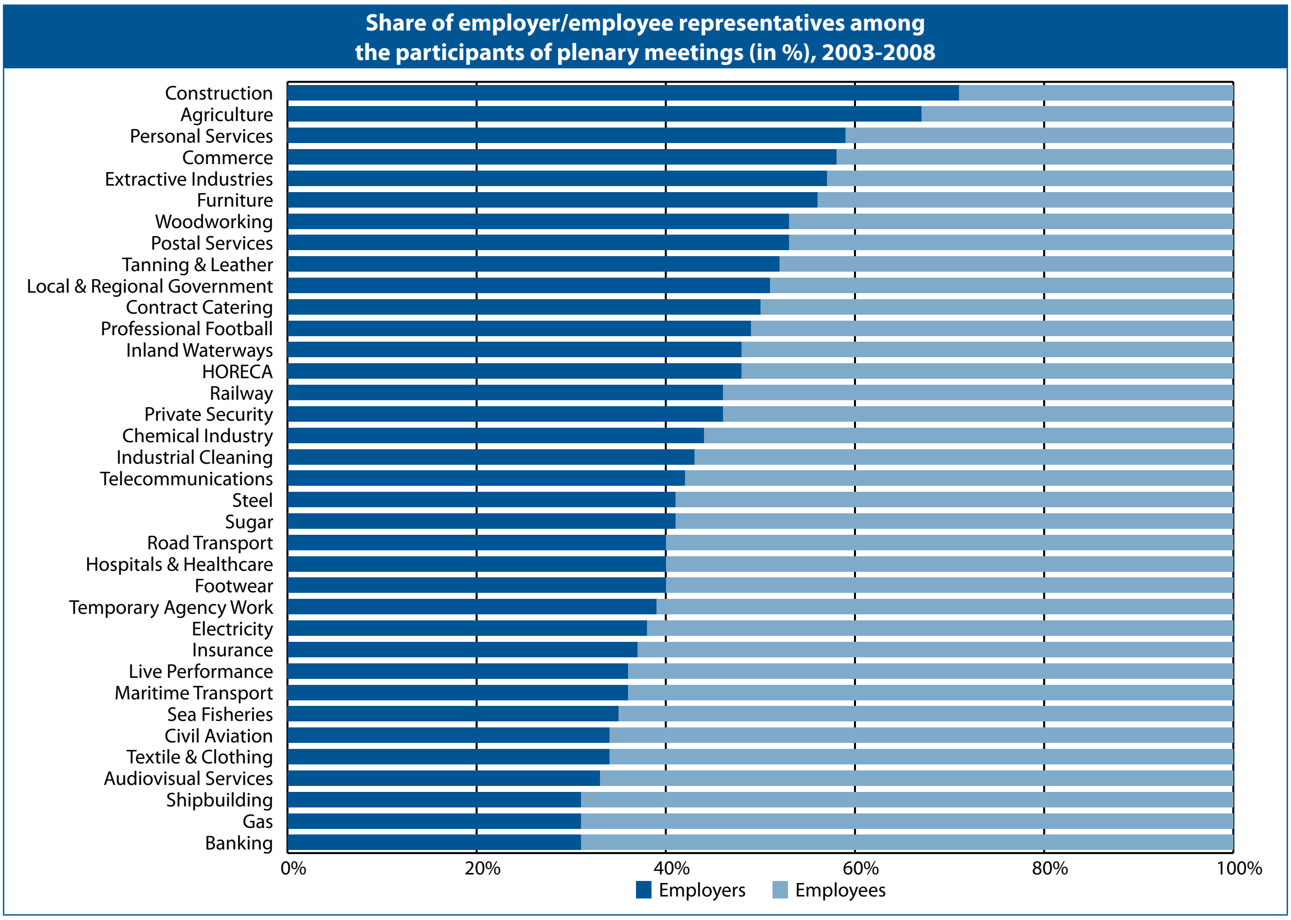


Chart 7.4:



ECONOMIC AND SECTORAL POLICIES					
	2006	2007	2008	2009	2010
		Audiovisual Services	Audiovisual Services		
	Banking				
				Chemical Industry	Chemical Industry
			Construction	Construction	Construction
	Electricity	Electricity	Electricity	Electricity	Electricity
	Footwear				
		Gas	Gas	Gas	Gas
Adaptation to change, restructuring, just transition, demographic change		Insurance	Insurance	Insurance	Insurance
	Local and Regional Government	Local and Regional Government	Local and Regional Government	Local and Regional Government	Local and Regional Government
			Postal Services	Postal Services	Postal Services
		Railways	Railways	Railways	Railways
		Shipbuilding	Shipbuilding	Shipbuilding	Shipbuilding
	Sugar	Sugar	Sugar	Sugar	Sugar
	Steel	Steel	Steel		
	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing
					Contract Catering
				Commerce	Commerce
				Construction	Construction
Financial and economic crisis Impact on the sector; measures				Chemical Industry	Chemical Industry
					Footwear
				Furniture	Furniture
				Horeca	Horeca
	Sea Fisheries				
		Contract Catering	Contract Catering		
	Civil Aviation	Civil Aviation	Civil Aviation	Civil Aviation	
		Industrial Cleaning	Industrial Cleaning		
					Commerce
	Footwear			Footwear	Footwear
	Furniture	Furniture	Furniture		
		Gas	Gas	Gas	Gas
				Live Performance	Live Performance
			Maritime Transport	Maritime Transport	
Sectoral policies; competitiveness; study of sector evolution		Personal Services	Personal Services		
		Private Security	Private Security	Private Security	Private Security
			Postal Services	Postal Services	Postal Services
		Railways	Railways	Railways	Railways
		Shipbuilding	Shipbuilding	Shipbuilding	Shipbuilding
	Steel	Steel	Steel		
	Sugar	Sugar	Sugar	Sugar	Sugar
	Tanning and Leather		Tanning and Leather	Tanning and Leather	Tanning and Leather
	Temporary Agency Work			Temporary Agency Work	Temporary Agency Work
	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing
	Woodworking	Woodworking	Woodworking	Woodworking	Woodworking

ECONOMIC AND SECTORAL POLICIES					
	2006	2007	2008	2009	2010
EU policies; legislative development				Agriculture	Agriculture
		Audiovisual Services	Audiovisual Services		
	Chemical Industry	Chemical Industry	Chemical Industry	Chemical Industry	Chemical Industry
	Civil Aviation	Civil Aviation	Civil Aviation	Civil Aviation	
				Commerce	Commerce
			Construction	Construction	Construction
	Electricity	Electricity	Electricity	Electricity	Electricity
	Extractive Industries	Extractive Industries	Extractive Industries	Extractive Industries	Extractive Industries
	Furniture				
				Gas	Gas
	Horeca	Horeca	Horeca	Horeca	Horeca
		Industrial Cleaning	Industrial Cleaning		
		Insurance	Insurance		
		Live Performance	Live Performance	Live Performance	Live Performance
	Local and Regional Government	Local and Regional Government	Local and Regional Government	Local and Regional Government	Local and Regional Government
			Maritime Transport	Maritime Transport	
				Personal Services	Personal Services
				Private Security	Private Security
		Railways	Railways	Railways	Railways
	Road Transport	Road Transport	Road Transport	Road Transport	Road Transport
	Sea Fisheries		Sea Fisheries		Sea Fisheries
		Shipbuilding	Shipbuilding		
	Sugar	Sugar	Sugar	Sugar	Sugar
			Telecommunications		
		Temporary Agency Work	Temporary Agency Work	Temporary Agency Work	Temporary Agency Work
	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing

SOCIAL DIALOGUE					
	2006	2007	2008	2009	2010
Social dialogue (in general); information and consultation; effectiveness of social dialogue; monitoring and implementation; representativeness studies; communication action plan	Contract Catering	Contract Catering	Contract Catering	Contract Catering	Contract Catering
			Central Administrations	Central Administrations	Central Administrations
	Commerce	Commerce	Commerce	Commerce	Commerce
	Footwear				
	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare
		Industrial Cleaning	Industrial Cleaning		
			Personal Services	Personal Services	
				Postal Services	Postal Services
				Private Security	Private Security
	Sea Fisheries		Sea Fisheries		
	Steel	Steel	Steel		
	Tanning and Leather	Tanning and Leather			
	Temporary Agency Work	Temporary Agency Work	Temporary Agency Work		
	Textile and Clothing	Textile and Clothing	Textile and Clothing		
Social dialogue (cross-sectoral; exchange with other sectors)			Central Administrations	Central Administrations	Central Administrations
	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare		
		Postal Services	Postal Services	Postal Services	Postal Services

SOCIAL DIALOGUE					
	2006	2007	2008	2009	2010
Social dialogue in New Member States				Agriculture	Agriculture
		Audiovisual Services	Audiovisual Services	Audiovisual Services	Audiovisual Services
	Banking	Banking	Banking		
				Chemical Industry	Chemical Industry
	Commerce	Commerce	Commerce	Commerce	Commerce
			Construction	Construction	Construction
	Footwear				
	Furniture	Furniture	Furniture	Furniture	Furniture
	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare
	Inland Waterways				
		Insurance	Insurance	Insurance	Insurance
		Live Performance	Live Performance	Live Performance	Live Performance
	Local and Regional Government	Local and Regional Government	Local and Regional Government	Local and Regional Government	Local and Regional Government
				Private Security	Private Security
			Professional Football	Professional Football	
		Railways	Railways		
	Sea Fisheries		Sea Fisheries		Sea Fisheries
	Telecommunications	Telecommunications	Telecommunications	Telecommunications	
	Tanning and Leather		Tanning and Leather	Tanning and Leather	
				Temporary agency work	Temporary agency work
	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing
	Woodworking				
Enlargement (in general)	Banking				
	Chemical Industry				
	Commerce	Commerce	Commerce	Commerce	Commerce
	Construction	Construction	Construction	Construction	Construction
				Electricity	Electricity
				Furniture	Furniture
		Gas	Gas		
		Live Performance	Live Performance		
	Road Transport				
	Sea Fisheries		Sea Fisheries		
	Temporary Agency Work				
	Textile and Clothing	Textile and Clothing	Textile and Clothing		

EDUCATION AND TRAINING; YOUTH EMPLOYMENT					
	2006	2007	2008	2009	2010
Training, education, vocational training, life-long learning; emerging competences; job profiles	Agriculture	Agriculture	Agriculture	Agriculture	Agriculture
		Audiovisual Services	Audiovisual Services	Audiovisual Services	Audiovisual Services
	Banking				
	Contract Catering	Contract Catering	Contract Catering	Contract Catering	Contract Catering
			Central Administrations	Central Administrations	Central Administrations
	Chemical Industry	Chemical Industry	Chemical Industry	Chemical Industry	Chemical Industry
	Civil Aviation	Civil Aviation	Civil Aviation	Civil Aviation	
				Commerce	Commerce
			Construction	Construction	Construction
	Footwear			Footwear	Footwear
	Furniture	Furniture	Furniture	Furniture	Furniture
				Gas	Gas
	Horeca	Horeca	Horeca	Horeca	Horeca
	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare
	Inland Waterways	Inland Waterways	Inland Waterways	Inland Waterways	Inland Waterways
				Insurance	
		Live Performance	Live Performance	Live Performance	Live Performance
	Local and Regional Government	Local and Regional Government	Local and Regional Government		
			Maritime Transport	Maritime Transport	
		Personal Services	Personal Services	Personal Services	Personal Services
		Private Security	Private Security	Private Security	Private Security
		Postal Services	Postal Services	Postal Services	Postal Services
		Railways	Railways		
	Road Transport	Road Transport	Road Transport	Road Transport	Road Transport
	Sea Fisheries		Sea Fisheries		Sea Fisheries
	Shipbuilding	Shipbuilding	Shipbuilding	Shipbuilding	Shipbuilding
	Steel	Steel	Steel		
	Tanning and Leather		Tanning and Leather	Tanning and Leather	Tanning and Leather
	Telecommunications	Telecommunications	Telecommunications	Telecommunications	
	Temporary Agency Work	Temporary Agency Work	Temporary Agency Work	Temporary Agency Work	Temporary Agency Work
	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing
	Woodworking	Woodworking	Woodworking	Woodworking	Woodworking
Young, youth employment, image of the sector				Agriculture	Agriculture
	Commerce	Commerce	Commerce	Commerce	
			Construction	Construction	Construction
		Extractive Industries			
			Maritime Transport		
	Shipbuilding	Shipbuilding	Shipbuilding	Shipbuilding	Shipbuilding

HEALTH AND SAFETY

	2006	2007	2008	2009	2010
Accident; alcohol; best practicies; blood borne infections; ergonomy; food hygiene; formaldehyde; illnesses; methane/NO2; muskulo-skeletal disorders; noise; no smoking; obesity; REACH; responsible care; risk assessment; safety; stress; violence	Agriculture	Agriculture	Agriculture	Agriculture	Agriculture
				Audiovisual Services	
	Contract Catering	Contract Catering	Contract Catering	Contract Catering	Contract Catering
			Central Administrations	Central Administrations	Central Administrations
	Chemical Industry	Chemical Industry	Chemical Industry	Chemical Industry	Chemical Industry
	Civil Aviation	Civil Aviation	Civil Aviation	Civil Aviation	
		Commerce	Commerce	Commerce	Commerce
	Construction	Construction	Construction	Construction	Construction
	Electricity	Electricity	Electricity		
	Extractive Industries	Extractive Industries	Extractive Industries	Extractive Industries	Extractive Industries
	Furniture	Furniture	Furniture	Furniture	Furniture
		Gas	Gas	Gas	Gas
			Horeca	Horeca	Horeca
	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare
	Live Performance	Live Performance	Live Performance	Live Performance	Live Performance
			Local and Regional Government	Local and Regional Government	Local and Regional Government
			Maritime Transport	Maritime Transport	
	Personal Services	Personal Services	Personal Services	Personal Services	Personal Services
		Postal Services	Postal Services	Postal Services	Postal Services
		Private Security	Private Security	Private Security	Private Security
		Road Transport	Road Transport		
	Sea Fisheries		Sea Fisheries		
	Steel	Steel	Steel		
			Tanning and Leather	Tanning and Leather	Tanning and Leather
	Telecommunications	Telecommunications	Telecommunications	Telecommunications	
	Woodworking	Woodworking	Woodworking	Woodworking	Woodworking

WORKING CONDITIONS

	2006	2007	2008	2009	2010
Working conditions (in general); contract standards; retention; flexible working practices; work organisation, sub-contracting, 'just culture'			Central Administrations	Central Administrations	Central Administrations
			Civil Aviation	Civil Aviation	
	Commerce	Commerce	Commerce		
		Horeca	Horeca	Horeca	Horeca
	Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare		
		Inland Waterways	Inland Waterways	Inland Waterways	Inland Waterways
	Local and Regional Government	Local and Regional Government	Local and Regional Government		
			Maritime Transport	Maritime Transport	
			Personal Services		
			Private Security	Private Security	Private Security
			Professional Football	Professional Football	
		Railways	Railways	Railways	Railways
		Road transport	Road transport		
					Sea Fisheries

WORKING CONDITIONS					
	2006	2007	2008	2009	2010
Employment; employability; flexicurity			Agriculture		
				Audiovisual Services	
		Banking	Banking		
		Chemical Industry	Chemical Industry		
			Construction	Construction	Construction
	Electricity	Electricity	Electricity		
	Hospitals and Healthcare	Hospitals and Healthcare			
		Insurances	Insurances		
			Maritime Transport		
		Private Security	Private Security		
		Railways	Railways	Railways	Railways
			Sea Fisheries		
				Sugar	Sugar
		Temporary Agency Work	Temporary Agency Work		
Working time		Civil Aviation	Civil Aviation	Civil Aviation	
					Commerce
		Industrial Cleaning	Industrial Cleaning		
	Inland Waterways	Inland Waterways	Inland Waterways	Inland Waterways	Inland Waterways
		Private Security	Private Security		

CORPORATE SOCIAL RESPONSIBILITY					
	2006	2007	2008	2009	2010
Best practices; responsible awarding of contracts; social considerations in public procurement (code of conduct)		Audiovisual Services	Audiovisual Services		
		Contract Catering	Contract Catering	Contract Catering	Contract Catering
	Footwear				
		Industrial Cleaning	Industrial Cleaning		
			Private Security	Private Security	Private Security
		Telecommunications	Telecommunications	Telecommunications	
	Sugar	Sugar	Sugar	Sugar	Sugar
	Tanning and Leather		Tanning and Leather		
	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing
CSR; social reporting	Banking				
	Contract Catering	Contract Catering	Contract Catering	Contract Catering	Contract Catering
	Chemical Industry	Chemical Industry	Chemical Industry		
	Civil Aviation	Civil Aviation	Civil Aviation		
	Commerce	Commerce	Commerce		
	Electricity	Electricity	Electricity	Electricity	Electricity
	Extractive Industries	Extractive Industries	Extractive Industries		
				Gas	Gas
	Horeca	Horeca	Horeca	Horeca	Horeca
	Hospitals and Healthcare	Hospitals and Healthcare			
		Postal Services	Postal Services	Postal Services	Postal Services
	Sugar	Sugar	Sugar	Sugar	Sugar
				Tanning and Leather	Tanning and Leather
	Telecommunications	Telecommunications	Telecommunications	Telecommunications	
			Textile and Clothing		

EQUAL OPPORTUNITIES, DIVERSITY, NON-DISCRIMINATION					
	2006	2007	2008	2009	2010
Gender equality, equal opportunities; non-discrimination; diversity			Audiovisual Services	Audiovisual Services	Audiovisual Services
	Contract Catering	Contract Catering	Contract Catering	Contract Catering	Contract Catering
			Central Administrations	Central Administrations	Central Administrations
	Commerce	Commerce	Commerce	Commerce	
	Electricity	Electricity		Electricity	Electricity
				Gas	Gas
				Insurance	
			Hospitals and Healthcare	Hospitals and Healthcare	Hospitals and Healthcare
	Local and Regional Government	Local and Regional Government	Local and Regional Government	Local and Regional Government	Local and Regional Government
		Railways	Railways	Railways	Railways
		Road Transport	Road Transport		
		Private Security	Private Security		
	Telecommunications	Telecommunications	Telecommunications	Telecommunications	
		Temporary Agency Work	Temporary Agency Work	Temporary Agency Work	Temporary Agency Work
Sexual harassement	Horeca				
			Electricity		
			Local and Regional Government	Local and Regional Government	Local and Regional Government

SUSTAINABLE DEVELOPMENT					
	2006	2007	2008	2009	2010
Environment; climate change, emissions trading, energy efficiency, just transition, eco-management, illegal logging, biomasse				Chemical Industry	Chemical Industry
			Construction	Construction	Construction
				Electricity	Electricity
		Extractive Industries	Extractive Industries	Extractive Industries	Extractive Industries
				Furniture	Furniture
					Postal Services
			Sea Fisheries		
	Steel	Steel	Steel		
		Woodworking	Woodworking	Woodworking	Woodworking
Global social standards; trade and labour issues; decent work agenda; trade negotiations; (un)fair competition, social dumping, anti-dumping	Footwear	Footwear	Footwear	Footwear	Footwear
				Inland Waterways	Inland Waterways
					Shipbuilding
				Sugar	Sugar
	Tanning and Leather	Tanning and Leather	Tanning and Leather	Tanning and Leather	Tanning and Leather
	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing	Textile and Clothing

DECENT WORK AND OTHER ISSUES					
	2006	2007	2008	2009	2010
Migrants, labour migration; seasonal workers; (bogus) self-employment; temporary workers; cross-border activities			Agriculture	Agriculture	Agriculture
			Central Administrations	Central Administrations	Central Administrations
		Commerce	Commerce	Commerce	
	Construction	Construction	Construction	Construction	Construction
	Horeca	Horeca	Horeca	Horeca	Horeca
				Live Performance	Live Performance
			Private Security	Private Security	Private Security
			Temporary Agency Work	Temporary Agency Work	Temporary Agency Work
Social security, pensions	Construction	Construction			Construction
	Live performance				
		Temporary Agency Work	Temporary Agency Work		
Undeclared work	Construction	Construction	Construction		
	Horeca	Horeca	Horeca	Horeca	Horeca
		Industrial Cleaning	Industrial Cleaning	Industrial Cleaning	Industrial Cleaning
Better regulation			Central Administrations	Central Administrations	Central Administrations
			Commerce	Commerce	
Remuneration and incentive systems; Solvency II					Insurance
Intellectual property rights, copyright, anti-piracy, counterfeiting, origin marking					Audiovisual Services
				Footwear	Footwear
				Live Performance	Live Performance
Protection of personal and private data			Civil Aviation	Civil Aviation	
Insecurity and feeling of insecurity in local public transport				Railways	Railways
Statuts of artists; cultural policy		Live Performance	Live Performance	Live Performance	Live Performance
Social tourism				Horeca	Horeca

Source: European Foundation for the Improvement of Living and Working Conditions (2009), Dynamics of European sectoral social dialogue, Dublin, for the years 2006-2008; European Commission services for the years 2009-2010.

Introductory remarks

The European Classification of Economic Activities (NACE) is the European reference framework for the production and the dissemination of statistics related to economic activities. Since its development in 1970, EU Member States have used NACE or national classifications derived from NACE: it is an integral part of the statistical infrastructure used within the European statistical system for producing comparable statistics. Statistics produced on the basis of NACE are comparable at European and, in general, at world level.

Changes in economic structures and organisations, as well as technological developments, give rise to new activities and products, which may supersede existing activities and products. Such changes imply a constant challenge for the compilation of statistical classifications and require, from time to time, revisions of statistical classifications. A major revision of international and European classifications of economic activities took place between 2000 and 2007.

The latest European classification of economic activities, called NACE Rev. 2, was adopted in 2006 and replaces NACE Rev.1.1. The revision was the outcome of a five-year long consultation process, which was coordinated by Eurostat and involved EU national statistical institutes, European trade and business associations, the European Central Bank and the United Nations Statistical Division.

List of NACE rev.2 codes

A	**Agriculture, Forestry and Fishing**
A1	Crop and animal production, hunting and related service activities
A1.1	Growing of non-perennial crops
A1.2	Growing of perennial crops
A1.3	Plant propagation
A1.4	Animal production
A1.5	Mixed farming
A1.6	Support activities to agriculture and post-harvest crop activities
A1.7	Hunting, trapping and related service activities
A2	Forestry and logging
A2.1	Silviculture and other forestry activities
A2.2	Logging
A2.3	Gathering of wild growing non-wood products
A2.4	Support services to forestry
A3	Fishing and aquaculture
A3.1	Fishing
A3.2	Aquaculture
B	**Mining and Quarrying**
B5	Mining of coal and lignite
B5.1	Mining of hard coal
B5.2	Mining of lignite
B6	Extraction of crude petroleum and natural gas
B6.1	Extraction of crude petroleum
B6.2	Extraction of natural gas
B7	Mining of metal ores
B7.1	Mining of iron ores
B7.2	Mining of non-ferrous metal ores
B8	Other mining and quarrying
B8.1	Quarrying of stone, sand and clay
B8.9	Mining and quarrying n.e.c.
B9	Mining support service activities
B9.1	Support activities for petroleum and natural gas extraction
B9.9	Support activities for other mining and quarrying
C	**Manufacturing**
C10	Manufacture of food products
C10.1	Processing and preserving of meat and production of meat products
C10.2	Processing and preserving of fish, crustaceans and molluscs
C10.3	Processing and preserving of fruit and vegetables
C10.4	Manufacture of vegetable and animal oils and fats
C10.5	Manufacture of dairy products
C10.6	Manufacture of grain mill products, starches and starch products
C10.7	Manufacture of bakery and farinaceous products
C10.8	Manufacture of other food products
C10.9	Manufacture of prepared animal feeds
C11	Manufacture of beverages
C11.0	Manufacture of beverages
C12	Manufacture of tobacco products
C12.0	Manufacture of tobacco products
C13	Manufacture of textiles
C13.1	Preparation and spinning of textile fibres
C13.2	Weaving of textiles
C13.3	Finishing of textiles
C13.9	Manufacture of other textiles
C14	Manufacture of wearing apparel
C14.1	Manufacture of wearing apparel, except fur apparel
C14.2	Manufacture of articles of fur
C14.3	Manufacture of knitted and crocheted apparel
C15	Manufacture of leather and related products
C15.1	Tanning and dressing of leather; manufacture of luggage, handbags, saddlery and harness; dressing and dyeing of fur
C15.2	Manufacture of footwear
C16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
C16.1	Sawmilling and planing of wood
C16.2	Manufacture of products of wood, cork, straw and plaiting materials
C17	Manufacture of paper and paper products
C17.1	Manufacture of pulp, paper and paperboard
C17.2	Manufacture of articles of paper and paperboard
C18	Printing and reproduction of recorded media
C18.1	Printing and service activities related to printing
C18.2	Reproduction of recorded media
C19	Manufacture of coke and refined petroleum products
C19.1	Manufacture of coke oven products
C19.2	Manufacture of refined petroleum products
C20	Manufacture of chemicals and chemical products
C20.1	Manufacture of basic chemicals, fertilisers and nitrogen compounds, plastics and synthetic rubber in primary forms

C20.2	Manufacture of pesticides and other agrochemical products
C20.3	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
C20.4	Manufacture of soap and detergents, cleaning and polishing preparations, perfumes and toilet preparations
C20.5	Manufacture of other chemical products
C20.6	Manufacture of man-made fibres
C21	Manufacture of basic pharmaceutical products and pharmaceutical preparations
C21.2	Manufacture of pharmaceutical preparations
C22	Manufacture of rubber and plastic products
C22.1	Manufacture of rubber products
C22.2	Manufacture of plastics products
C23	Manufacture of other non-metallic mineral products
C23.1	Manufacture of glass and glass products
C23.2	Manufacture of refractory products
C23.3	Manufacture of clay building materials
C23.4	Manufacture of other porcelain and ceramic products
C23.5	Manufacture of cement, lime and plaster
C23.6	Manufacture of articles of concrete, cement and plaster
C23.7	Cutting, shaping and finishing of stone
C23.9	Manufacture of abrasive products and non-metallic mineral products n.e.c.
C24	Manufacture of basic metals
C24.1	Manufacture of basic iron and steel and of ferro-alloys
C24.2	Manufacture of tubes, pipes, hollow profiles and related fittings, of steel
C24.3	Manufacture of other products of first processing of steel
C24.4	Manufacture of basic precious and other non-ferrous metals
C24.5	Casting of metals
C25	Manufacture of fabricated metal products, except machinery and equipment
C25.1	Manufacture of structural metal products
C25.2	Manufacture of tanks, reservoirs and containers of metal
C25.3	Manufacture of steam generators, except central heating hot water boilers
C25.4	Manufacture of weapons and ammunition
C25.5	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
C25.6	Treatment and coating of metals; machining
C25.7	Manufacture of cutlery, tools and general hardware
C25.9	Manufacture of other fabricated metal products
C26	Manufacture of computer, electronic and optical products
C26.1	Manufacture of electronic components and boards
C26.2	Manufacture of computers and peripheral equipment
C26.3	Manufacture of communication equipment
C26.4	Manufacture of consumer electronics
C26.5	Manufacture of instruments and appliances for measuring, testing and navigation; watches and clocks

C26.6	Manufacture of irradiation, electromedical and electrotherapeutic equipment
C26.7	Manufacture of optical instruments and photographic equipment
C26.8	Manufacture of magnetic and optical media
C27	Manufacture of electrical equipment
C27.2	Manufacture of batteries and accumulators
C27.3	Manufacture of wiring and wiring devices
C27.4	Manufacture of electric lighting equipment
C27.5	Manufacture of domestic appliances
C27.9	Manufacture of other electrical equipment
C28	Manufacture of machinery and equipment n.e.c.
C28.1	Manufacture of general-purpose machinery
C28.2	Manufacture of other general-purpose machinery
C28.3	Manufacture of agricultural and forestry machinery
C28.4	Manufacture of metal forming machinery and machine tools
C28.4.1	Manufacture of metal forming machinery
C28.4.9	Manufacture of other machine tools
C28.9	Manufacture of other special-purpose machinery
C29	Manufacture of motor vehicles, trailers and semi-trailers
C29.1	Manufacture of motor vehicles
C29.2	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers
C29.3	Manufacture of parts and accessories for motor vehicles
C30	Manufacture of other transport equipment
C30.1	Building of ships and boats
C30.2	Manufacture of railway locomotives and rolling stock
C30.3	Manufacture of air and spacecraft and related machinery
C30.4	Manufacture of military fighting vehicles
C30.9	Manufacture of transport equipment n.e.c.
C31	Manufacture of furniture
C31.0	Manufacture of furniture
C32	Other manufacturing
C32.1	Manufacture of jewellery, bijouterie and related articles
C32.2	Manufacture of musical instruments
C32.3	Manufacture of sports goods
C32.4	Manufacture of games and toys
C32.5	Manufacture of medical and dental instruments and supplies
C32.9	Manufacturing n.e.c.
C33	Repair and installation of machinery and equipment
C33.1	Repair of fabricated metal products, machinery and equipment
C33.2	Installation of industrial machinery and equipment
D	**Electricity, Gas, Steam and Air Conditioning Supply**
D35	Electricity, gas, steam and air conditioning supply
D35.1	Electric power generation, transmission and distribution
D35.2	Manufacture of gas; distribution of gaseous fuels through mains
D35.3	Steam and air conditioning supply

E	**Water Supply; Sewerage; Waste Managment and Remediation Activities**
E36	Water collection, treatment and supply
E36.0	Water collection, treatment and supply
E37	Sewerage
E37.0	Sewerage
E38	Waste collection, treatment and disposal activities; materials recovery
E38.1	Waste collection
E38.2	Waste treatment and disposal
E38.3	Materials recovery
E39	Remediation activities and other waste management services
E39.0	Remediation activities and other waste management services
F	**Construction**
F41	Construction of buildings
F41.1	Development of building projects
F41.2	Construction of residential and non-residential buildings
F42	Civil engineering
F42.1	Construction of roads and railways
F42.2	Construction of utility projects
F42.9	Construction of other civil engineering projects
F43	Specialised construction activities
F43.1	Demolition and site preparation
F43.2	Electrical, plumbing and other construction installation activities
F43.3	Building completion and finishing
F43.9	Other specialised construction activities
G	**Wholesale And Retail Trade; Repair Of Motor Vehicles and Motorcycles**
G45	Wholesale and retail trade and repair of motor vehicles and motorcycles
G45.1	Sale of motor vehicles
G45.2	Maintenance and repair of motor vehicles
G45.3	Sale of motor vehicle parts and accessories
G45.4	Sale, maintenance and repair of motorcycles and related parts and accessories
G46	Wholesale trade, except of motor vehicles and motorcycles
G46.1	Wholesale on a fee or contract basis
G46.2	Wholesale of agricultural raw materials and live animals
G46.3	Wholesale of food, beverages and tobacco and tobacco
G46.4	Wholesale of household goods
G46.5	Wholesale of information and communication equipment
G46.6	Wholesale of other machinery, equipment and supplies
G46.7	Other specialised wholesale
G46.9	Non-specialised wholesale trade
G47	Retail trade, except of motor vehicles and motorcycles
G47.1	Retail sale in non-specialised stores
G47.2	Retail sale of food, beverages and tobacco in specialised stores
G47.3	Retail sale of automotive fuel in specialised stores
G47.4	Retail sale of information and communication equipment in specialised stores
G47.5	Retail sale of other household equipment in specialised stores
G47.6	Retail sale of cultural and recreation goods in specialised stores
G47.7	Retail sale of other goods in specialised stores
G47.8	Retail sale via stalls and markets
G47.9	Retail trade not in stores, stalls or markets
H	**Transporting and Storage**
H49	Land transport and transport via pipelines
H49.1	Passenger rail transport, interurban
H49.2	Freight rail transport
H49.3	Other passenger land transport
H49.4	Freight transport by road and removal services
H49.5	Transport via pipeline
H50	Water transport
H50.1	Sea and coastal passenger water transport
H50.2	Sea and coastal freight water transport
H50.3	Inland passenger water transport
H50.4	Inland freight water transport
H51	Air transport
H51.1	Passenger air transport
H52	Warehousing and support activities for transportation
H52.1	Warehousing and storage
H52.2	Support activities for transportation
H53	Postal and courier activities
H53.1	Postal activities under universal service obligation
H53.2	Other postal and courier activities
I	**Accommodation and Food Service Activities**
I55	Accommodation
I55.1	Hotels and similar accommodation
I55.2	Holiday and other short-stay accommodation
I55.3	Camping grounds, recreational vehicle parks and trailer parks
I55.9	Other accommodation
I56	Food and beverage service activities
I56.1	Restaurants and mobile food service activities
I56.2	Event catering and other food service activities
I56.3	Beverage serving activities
J	**Information and Communication**
J58	Publishing activities
J58.1	Publishing of books, periodicals and other publishing activities
J58.2	Software publishing
J59	Motion picture, video and television programme production, sound recording and music publishing activities
J59.1	Motion picture, video and television programme activities
J59.2	Sound recording and music publishing activities
J60	Programming and broadcasting activities
J60.1	Radio broadcasting
J60.2	Television programming and broadcasting activities
J61	Telecommunications
J61.1	Wired telecommunications activities
J61.2	Wireless telecommunications activities
J61.3	Satellite telecommunications activities
J61.9	Other telecommunications activities

J62	Computer programming, consultancy and related activities
J62.0	Computer programming, consultancy and related activities
J63	Information service activities
J63.1	Data processing, hosting and related activities; web portals
J63.9	Other information service activities
K	**Financial and Insurance Activities**
K64	Financial service activities, except insurance and pension funding
K64.1	Monetary intermediation
K64.2	Activities of holding companies
K64.3	Trusts, funds and similar financial entities
K64.9	Other financial service activities, except insurance and pension funding
K65	Insurance, reinsurance and pension funding, except compulsory social security
K65.1	Insurance
K65.2	Reinsurance
K65.3	Pension funding
K66	Activities auxiliary to financial services and insurance activities
K66.1	Activities auxiliary to financial services, except insurance and pension funding
K66.2	Activities auxiliary to insurance and pension funding
K66.3	Fund management activities
L	**Real Estate Activities**
L68	Real estate activities
L68.1	Buying and selling of own real estate
L68.2	Renting and operating of own or leased real estate
L68.3	Real estate activities on a fee or contract basis
M	**Professional, Scientific and Technical Activities**
M69	Legal and accounting activities
M69.1	Legal activities
M69.2	Accounting, bookkeeping and auditing activities; tax consultancy
M70	Activities of head offices; management consultancy activities
M70.1	Activities of head offices
M70.2	Management consultancy activities
M71	Architectural and engineering activities; technical testing and analysis
M71.1	Architectural and engineering activities and related technical consultancy
M71.2	Technical testing and analysis
M72	Scientific research and development
M72.1	Research and experimental development on natural sciences and engineering
M72.2	Research and experimental development on social sciences and humanities
M73	Advertising and market research
M73.1	Advertising
M73.2	Market research and public opinion polling
M74	Other professional, scientific and technical activities
M74.1	Specialised design activities
M74.2	Photographic activities
M74.3	Translation and interpretation activities

M74.9	Other professional, scientific and technical activities n.e.c.
M75	Veterinary activities
M75.0	Veterinary activities
N	**Administrative and Support Service Activities**
N77	Rental and leasing activities
N77.1	Renting and leasing of motor vehicles
N77.2	Renting and leasing of personal and household goods
N77.3	Renting and leasing of other machinery, equipment and tangible goods
N77.4	Leasing of intellectual property and similar products, except copyrighted works
N78	Employment activities
N78.1	Activities of employment placement agencies
N78.2	Temporary employment agency activities
N78.3	Other human resources provision
N79	Travel agency, tour operator and other reservation service and related activities
N79.1	Travel agency and tour operator activities
N79.9	Other reservation service and related activities
N80	Security and investigation activities
N80.1	Private security activities
N80.2	Security systems service activities
N80.3	Investigation activities
N81	Services to buildings and landscape activities
N81.1	Combined facilities support activities
N81.2	Cleaning activities
N81.3	Landscape service activities
N82	Office administrative, office support and other business support activities
N82.1	Office administrative and support activities
N82.2	Activities of call centres
N82.3	Organisation of conventions and trade shows
N82.9	Business support service activities n.e.c.
O	**Public Administration and Defence; Compulsory Social Security**
O84	Public administration and defence; compulsory social security
O84.1	Administration of the State and the economic and social policy of the community
O84.2	Provision of services to the community as a whole
O84.3	Compulsory social security activities
P	**Education**
P85	Education
P85.1	Pre-primary education
P85.2	Primary education
P85.3	Secondary education
P85.4	Higher education
P85.4.2	Tertiary education
P85.5	Other education
P85.6	Educational support activities
Q	**Human Health and Social Work Activities**
Q86	Human health activities
Q86.1	Hospital activities
Q86.2	Medical and dental practice activities
Q86.9	Other human health activities
Q87	Residential care activities
Q87.1	Residential nursing care activities

Q87.2	Residential care activities for mental retardation, mental health and substance abuse
Q87.3	Residential care activities for the elderly and disabled
Q87.9	Other residential care activities
Q88	Social work activities without accommodation
Q88.1	Social work activities without accommodation for the elderly and disabled
Q88.9	Other social work activities without accommodation
R	**Arts, Entertainment and Recreation**
R90	Creative, arts and entertainment activities
R90.0	Creative, arts and entertainment activities
R91	Libraries, archives, museums and other cultural activities
R91.0	Libraries, archives, museums and other cultural activities
R92	Gambling and betting activities
R92.0	Gambling and betting activities
R93	Sports activities and amusement and recreation activities
R93.1	Sports activities
R93.2	Amusement and recreation activities
S	**Other Services Activities**
S94	Activities of membership organisations
S94.1	Activities of business, employers and professional membership organisations
S94.2	Activities of trade unions
S94.9	Activities of other membership organisations
S95	Repair of computers and personal and household goods
S95.1	Repair of computers and communication equipment
S95.2	Repair of personal and household goods
S96	Other personal service activities
S96.0	Other personal service activities
T	**Activities of households as employers; undifferentiated goods – and services – producing activities of households for own use**
T97	Activities of households as employers of domestic personnel
T97.0	Activities of households as employers of domestic personnel
T98	Undifferentiated goods- and services-producing activities of private households for own use
T98.1	Undifferentiated goods-producing activities of private households for own use
T98.2	Undifferentiated service-producing activities of private households for own use
U	**Activities of Extraterritorial Organisations and Bodies**
U99	Activities of extraterritorial organisations and bodies
U99.0	Activities of extraterritorial organisations and bodies

ANNEX 10: European sectoral social dialogue committees – overview of NACE classifications

SECTOR	NACE CLASSIFICATION
Agriculture	NACE rev.2 class 01 (mainly equivalent to NACE rev.1.1 class 01) most closely covers the sector, including the growing of crops, fruit and vegetables, the raising of animals, landscape gardening, hunting and related agricultural and animal husbandry service activities, and excluding forestry and logging and related activities, fishing and fish farming and veterinary activities.
Agro-Food Industry ***	NACE rev.2 classes 10-12 (mainly equivalent to NACE rev.1.1 classes 15-16 and 51.3-51.4) most closely cover manufacture of food products, beverages and tobacco products.
Audiovisual Services	NACE rev.2 classes 18, 58-60 and 63 (mainly equivalent to NACE rev.1.1 classes 22 and 92) most closely covers the sector, including: printing and publishing activities; the reproduction of recorded media; motion pictures and video, radio and television programme production, distribution and broadcasting activities; recreational, cultural and sporting activities; activities of news agencies.
Banking	NACE rev.2 class 64 (mainly equivalent to NACE rev.1.1 class 65) most closely covers the sector and includes banks, credit institutions and financial service activities other than insurance and pension funds.
Central Administration**	NACE rev.2 class 84 (mainly equivalent to NACE rev.1.1 class 75) most closely covers the sector, including general public administration activities, regulation of the activities of providing health care, education, cultural services, compulsory social security and other social services, foreign affairs, defence activities, justice and judicial activities, public order and safety activities, and fire service activities.
Chemical Industry	NACE rev.2 classes 20-22 (mainly equivalent to NACE rev.1.1 classes 24-25) most closely covers the sector, including petrochemicals and plastics, specialty and fine chemicals, pharmaceutical products and pharmaceutical preparations, and consumer and other chemicals.
Civil Aviation	NACE rev.2 classes 51.1, 51.21 (mainly equivalent to NACE rev.1.1 classes 62.A and 62.2) and NACE rev.2 class 52.2 most closely cover the sector, including scheduled and non-scheduled passenger and freight air transport as well as relevant support activities, ground handling and air traffic management.
Commerce	NACE rev.2 classes 45-47 (mainly equivalent to NACE rev.1.1 classes 50-52) most closely cover the sector, including retail and wholesale trade including repair and trade of motor vehicles.
Construction	NACE rev.2 classes 41-43 (mainly equivalent to NACE rev.1.1 class 45), covering all forms of building and civil engineering activities as well as specialised construction activities such demolition and site preparation and the renting of construction or demolition equipment with operators.
Contract Catering	NACE rev.2 class 56.29 (mainly equivalent to NACE rev.1.1 classes 55.51-55.52) most closely covers the sector, including canteens, catering and other food service activities.
Education*	NACE rev.2 class 85 (mainly equivalent to NACE rev.1.1 class 80) most closely covers the sector, including pre-primary, primary, general secondary, technical and vocational, tertiary, adult and other education
Electricity	NACE rev.2 class 35.1 (mainly equivalent to NACE rev.1.1 class 40.1) most closely covers the sector, including the production, transmission, distribution and trade of electricity.
Extractive Industries	NACE rev.2 classes 05 and 07-09 (mainly equivalent to NACE rev.1.1 classes 10 and 13-14) most closely covers the sector, including: mining of hard coal, lignite, iron and non-ferrous metal ores, and minerals; extraction of peat and salt; other mining and quarrying activities and support activities; it excludes the extraction of crude petroleum and natural gas.
Footwear	NACE rev.2 classes 15.2, 22.19 and 22.29 (mainly equivalent to NACE rev.1.1 class 19.3) most closely cover the sector, including the manufacture of footwear from materials such as textiles, plastics, rubber or leather as well as specialised products such as snowboard boots and protective footwear.
Furniture	NACE rev.2 class 31 (mainly equivalent to NACE rev.1.1 class 36.1) most closely covers the sector, including manufacture of office and shop furniture, kitchen and other furniture.
Gas	NACE rev.2 class 35.2 (mainly equivalent to NACE rev.1.1 class 40.2) most closely covers the sector, including production, distribution and trade of gas.
Horeca	NACE rev.2 classes 55-56 (mainly equivalent to NACE rev.1.1 class 55) most closely covers the sector, including hotels and accommodation, restaurants, catering, cafés, canteens, short-stay accommodation and similar establishments.
Hospitals and Healthcare	NACE rev.2 classes 86-87, and notably NACE rev.2 class 86.1 (mainly equivalent to NACE rev.1.1 class 85.11), most closely cover the sector, including hospital, human health and care activities.
Industrial Cleaning	NACE rev.2 class 81.2 (mainly equivalent to NACE rev.1.1 class 74.7) most closely covers the sector, including: services provided by specialised contractors, building maintenance and associated cleaning, cleaning of trains, buses and planes, waste management services and disinfecting and exterminating activities.
Inland Waterways	NACE rev.2 classes 50.3-50.4 (mainly equivalent to NACE rev.1.1 class 61.2) and NACE rev.2 class 52.2 most closely cover the sector, including inland passenger and freight water transport as well as relevant support activities.
Insurance	NACE rev.2 class 65 (mainly equivalent to NACE rev.1.1 class 66) most closely covers the sector and includes insurance, reinsurance and pension funding, except compulsory social security.
Live Performance	NACE rev.2 class 90 (mainly equivalent to NACE rev.1.1 class 92.3) most closely covers the sector, including artistic and literary creation, performing arts, interpretation, operation of arts facilities, fair and amusement parks and other entertainment activities in direct contact with the public.

SECTOR	NACE CLASSIFICATION
Local and Regional Government	No specific NACE classification covers local and regional government. NACE rev.2 class 84.1 (mainly equivalent to NACE rev.1.1 class 75.1) covers administration of the state and the economic and social policy of the community, and NACE rev.2 class 84.2 (mainly equivalent to NACE rev.1.1 class 75.2) covers the provision of services to the community as a whole (excluding central government). Other activities such as social work, health care and education are covered by other NACE classes and may in many cases form part of local and regional government, too.
Maritime Transport	NACE rev.2 classes 50.1-50.2 (mainly equivalent to NACE rev.1.1 class 61.1) and NACE rev.2 class 52.2 most closely cover the sector, including sea and coastal passenger and freight transport as well as relevant support activities.
Metal Industry*	NACE rev.2 classes 25-30 (mainly equivalent to NACE rev.1.1 classes 28-30) most closely cover the sector, including manufacture of metal products; computer, electronical and optical products; electrical equipment; machinery and equipment; motor vehicles; ships and boats.
Paper Industry*	NACE rev.2 class 17 (mainly equivalent to NACE rev.1.1 class 21) most closely covers the sector, including manufacture of pulp, paper and paper products.
Personal Services	NACE rev.2 class 96.02 (mainly equivalent to NACE rev.1.1 class 93.02) most closely covers the sector, including hairdressing and other beauty treatment.
Postal Services	NACE rev.2 classes 53.1-53.2 (mainly equivalent to NACE rev.1.1 class XX) most closely cover the sector, including postal and courier activities. However, the services provided by postal operators may also include communication, logistics, retail, money transmission and other financial services, and many others besides. Indeed, the NACE rev.2 classification has been adapted to allow for a distinction of activities into 'postal activities under universal service obligation' and 'other postal and courier activities'.
Private Security	NACE rev.2 class 80 (mainly equivalent to NACE rev.1.1 class 74.6) most closely covers the sector, including private security activities, securtity systems service activities and investigation activities.
Professional Football	NACE rev.2 class 93.12 (mainly equivalent to NACE rev.1.1 class 92.62) most closely covers the activities of sport clubs. Professional football is one part of this classification.
Railways	NACE rev.2 classes 49.1-49.2 (mainly equivalent to NACE rev.1.1 class 60.1) and NACE rev.2 class 52.2 most closely cover the sector, including passenger and freight rail transport as well as relevant support activities.
Road Transport	NACE rev.2 classes 49.3-49.4 (mainly equivalent to NACE rev.1.1 class 60.2) and NACE rev.2 class 52.2 most closely cover the sector, including passenger and freight transport as well as relevant support activities.
Sea Fisheries	NACE rev.2 class 0.3 (mainly equivalent to NACE rev.1.1 class 0.5) most closely covers the sector, including marine and freshwater fishing and aquaculture.
Shipbuilding	NACE rev.2 classes 30.1 and 33.15 (mainly equivalent to NACE rev.1.1 class 35.1) most closely cover the sector, including the building, repair and maintenance of ships and boats.
Sport and Active Leisure ***	NACE rev.2 class 93.1 (mainly equivalent to NACE rev.1.1 classes 92.6 and 93.0) most closely covers sports activities, including the operation of sports facilities, activities of sports clubs, fitness facilities and other sports activities. Some further sport and active leisure activities are also covered by NACE rev.2 classes 85.51 and 93.29.
Steel	NACE rev.2 class 24.10 (equivalent to NACE rev.1.1 class 27.1) most closely covers the sector, including manufacture of basic iron and steel and of ferro-alloys.
Sugar	NACE rev.2 classes 10.81-10.82 (mainly equivalent to NACE rev.1.1 classes 15.83-15.84) most closely cover the sector, including the manufacture of sugar and sugar confectionary.
Tanning & Leather	NACE rev.2 class 15.1 (mainly equivalent to NACE rev.1.1 classes 19.1-19.2) most closely covers the sector, including tanning and dressing of leather, and manufacture of luggage, handbags, saddlery and harness.
Telecommunications	NACE rev.2 classes 60.1-60.2, 61 and 82.2 (mainly equivalent to NACE rev.1.1 class 64.2) most closely cover the sector, including: radio and television broadcasting; wired, satellite and other telecommunications activities; maintenance of the network; and call centre activities.
Temporary Agency Work	Temporary agency work cuts across NACE sector classifications and refers to situations where workers are employed by an agency, and then, via a commercial contract, hired out to perform work assignments at a user enterprise.
Textile & Clothing	NACE rev.2 classes 13-14 (mainly equivalent to NACE rev.1.1 classes 17-18) most closely cover the sector, including the manufacture and production of textiles and clothing.
Woodworking	NACE rev.2 class 16 (mainly equivalent to NACE rev.1.1 class 20) most closely covers the sector, including sawmilling and planing of wood and manufacture of wood and products of wood and cork, except furniture, and excluding forestry and logging activities.

* Committee to be created;

** Committee in test phase;

*** Candidate sector for new representativeness studies.

ANNEX 11: Number of employed and employees in the EU in 2008, by sector (NACE 2-digit)

NACE CODE	SECTOR	EMPLOYED	EMPLOYEES	SELF	WOMEN	TEMP	PART	LOW	HIGH
1	Crop and animal production	10.58	2.36	78%	33%	31%	14%	45%	9%
2	Forestry and logging	0.54	0.41	24%	15%	20%	6%	34%	17%
3	Fishing and aquaculture	0.19	0.10	46%	9%	16%	8%	56%	10%
5	Mining of coal and lignite	0.34	0.34	0%	11%	7%	1%	8%	9%
6	Extraction of crude petroleum and natural gas	0.10	0.10	2%	14%	5%	4%	10%	29%
7	Mining of metal ores	0.07	0.06	2%	17%	8%	1%	14%	22%
8	Other mining and quarrying	0.28	0.26	7%	13%	11%	4%	37%	10%
9	Mining support service activities	0.13	0.12	5%	20%	6%	3%	11%	36%
10	Manufacture of food products	4.51	4.13	8%	46%	16%	12%	31%	13%
11	Manufacture of beverages	0.49	0.47	4%	29%	10%	7%	23%	22%
12	Manufacture of tobacco products	0.06	0.06	1%	42%	9%	8%	23%	21%
13	Manufacture of textiles	0.94	0.86	9%	53%	10%	8%	38%	9%
14	Manufacture of wearing apparel	1.73	1.54	11%	83%	11%	7%	31%	8%
15	Manufacture of leather and related products	0.56	0.49	11%	60%	13%	6%	44%	5%
16	Manufacture of wood and of products of wood and cork, except furniture	1.37	1.15	16%	18%	13%	5%	33%	8%
17	Manufacture of paper and paper products	0.74	0.72	3%	27%	10%	5%	29%	16%
18	Printing and reproduction of recorded media	1.18	1.03	13%	35%	9%	11%	24%	17%
19	Manufacture of coke and refined petroleum products	0.24	0.24	3%	21%	8%	5%	14%	33%
20	Manufacture of chemicals and chemical products	1.46	1.42	3%	30%	9%	6%	19%	29%
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations	0.80	0.79	2%	49%	9%	8%	13%	48%
22	Manufacture of rubber and plastic products	1.72	1.65	4%	29%	12%	6%	28%	13%
23	Manufacture of other non-metallic mineral products	1.65	1.51	8%	22%	11%	5%	33%	13%
24	Manufacture of basic metals	1.45	1.41	3%	13%	9%	3%	25%	14%
25	Manufacture of fabricated metal products, except machinery and equipment	4.30	3.87	10%	17%	12%	6%	28%	13%
26	Manufacture of computer, electronic and optical products	1.73	1.67	3%	35%	11%	7%	14%	34%
27	Manufacture of electrical equipment	1.56	1.51	4%	35%	12%	5%	22%	20%
28	Manufacture of machinery and equipment n.e.c.	3.32	3.18	4%	18%	9%	5%	18%	22%
29	Manufacture of motor vehicles	3.18	3.14	1%	23%	12%	4%	21%	20%
30	Manufacture of other transport equipment	1.12	1.09	2%	15%	10%	3%	17%	28%
31	Manufacture of furniture	1.53	1.29	15%	25%	14%	6%	30%	10%
32	Other manufacturing	1.17	1.00	14%	44%	11%	16%	26%	19%
33	Repair and installation of machinery and equipment	1.09	0.94	14%	15%	12%	5%	21%	19%
35	Electricity, gas, steam and air conditioning supply	1.54	1.52	2%	22%	7%	6%	10%	30%
36	Water collection, treatment and supply	0.44	0.44	2%	23%	6%	5%	17%	25%
37	Sewerage	0.15	0.14	5%	21%	13%	7%	20%	15%
38	Waste collection, treatment and disposal activities; materials recovery	0.92	0.88	5%	18%	13%	9%	41%	12%

ANNEX 11: Number of employed and employees in the EU in 2008, by sector (NACE 2-digit)

NACE CODE	SECTOR	EMPLOYED	EMPLOYEES	SELF	WOMEN	TEMP	PART	LOW	HIGH
39	Remediation activities and other waste management services	0.05	0.05	7%	23%	12%	7%	29%	22%
41	Construction of buildings	6.16	5.03	18%	11%	23%	5%	42%	13%
42	Civil engineering	1.48	1.37	8%	10%	17%	4%	31%	15%
43	Specialised construction activities	10.88	7.56	31%	10%	16%	7%	29%	12%
45	Wholesale and retail trade and repair of motor vehicles and motorcycles	4.13	3.23	22%	18%	12%	9%	27%	13%
46	Wholesale trade	7.79	6.51	16%	36%	11%	11%	23%	23%
47	Retail trade	19.56	15.54	21%	67%	14%	33%	26%	13%
49	Land transport and transport via pipelines	6.08	4.98	18%	15%	8%	7%	27%	10%
50	Water transport	0.31	0.29	7%	21%	16%	6%	18%	29%
51	Air transport	0.46	0.45	1%	42%	8%	15%	11%	38%
52	Warehousing and support activities for transportation	2.68	2.55	5%	25%	11%	9%	25%	15%
53	Postal and courier activities	1.98	1.90	4%	44%	9%	21%	26%	12%
55	Accommodation	2.29	2.01	12%	60%	25%	22%	33%	15%
56	Food and beverage service activities	7.03	5.36	24%	58%	21%	36%	37%	9%
58	Publishing activities	1.26	1.11	12%	49%	11%	26%	15%	45%
59	Motion picture, video and television programme production, sound recording and music publishing activities	0.43	0.31	27%	40%	22%	22%	11%	46%
60	Programming and broadcasting activities	0.30	0.28	8%	44%	18%	13%	7%	54%
61	Telecommunications	1.43	1.37	4%	34%	10%	9%	11%	38%
62	Computer programming, consultancy and related activities	2.48	2.05	18%	25%	8%	8%	4%	62%
63	Information service activities	0.33	0.24	25%	43%	12%	14%	10%	49%
64	Financial service activities, except insurance and pension funding	4.15	4.04	3%	53%	7%	12%	7%	45%
65	Insurance	1.20	1.07	11%	57%	8%	15%	8%	42%
66	Activities auxiliary to financial services and insurance activities	1.26	0.93	26%	55%	6%	17%	9%	39%
68	Real estate activities	1.66	1.28	23%	55%	9%	21%	19%	28%
69	Legal and accounting activities	3.55	2.32	35%	71%	9%	22%	8%	46%
70	Activities of head offices; management consultancy activities	1.10	0.77	31%	54%	8%	18%	8%	58%
71	Architectural and engineering activities; technical testing and analysis	2.75	1.86	32%	34%	10%	12%	6%	59%
72	Scientific research and development	0.85	0.80	6%	44%	19%	12%	4%	70%
73	Advertising and market research	1.03	0.77	25%	53%	17%	23%	15%	42%
74	Other professional, scientific and technical activities	0.91	0.49	46%	50%	14%	18%	12%	40%
75	Veterinary activities	0.22	0.15	31%	74%	12%	32%	10%	46%
77	Rental and leasing activities	0.46	0.40	14%	36%	11%	17%	24%	21%
78	Employment activities, incl. placement and temporary employment agency activities	1.03	0.97	6%	51%	33%	22%	21%	28%
79	Travel agency, tour operator and other reservation service and related activities	0.61	0.50	17%	71%	14%	21%	10%	36%
80	Security and investigation activities	1.22	1.18	4%	17%	18%	10%	28%	11%
81	Services to buildings and landscape activities	3.35	2.91	13%	62%	19%	44%	52%	7%
82	Office administrative, office support and other business support activities	1.38	1.08	22%	56%	19%	24%	19%	27%

NACE CODE	SECTOR	EMPLOYED	EMPLOYEES	SELF	WOMEN	TEMP	PART	LOW	HIGH
84	Public administration and defence; compulsory social security	15.69	15.62	0%	46%	11%	13%	15%	36%
85	Education	15.45	14.79	4%	72%	16%	24%	8%	65%
86	Human health activities	12.73	11.31	11%	79%	13%	26%	12%	43%
87	Residential care activities	3.89	3.80	2%	81%	16%	39%	23%	25%
88	Social work activities without accommodation	4.57	4.35	5%	83%	17%	40%	24%	28%
90	Creative arts and entertainment activities	1.03	0.53	49%	47%	28%	29%	11%	44%
91	Libraries, archives, museums and other cultural activities	0.59	0.57	4%	66%	17%	28%	12%	46%
92	Gambling and betting activities	0.35	0.31	13%	55%	13%	22%	29%	16%
93	Sports activities and amusement and recreation activities	1.45	1.18	18%	45%	26%	39%	23%	24%
94	Activities of membership organisations	1.70	1.62	5%	58%	16%	32%	14%	45%
95	Repair of computers and personal and household goods	0.55	0.32	43%	27%	14%	11%	23%	18%
96	Other personal service activities	3.14	1.90	39%	77%	18%	33%	30%	10%
97	Activities of households as employers of domestic personnel	2.52	2.35	7%	89%	22%	58%	56%	8%
98	Undifferentiated goods- and services-producing activities of private households for own use	0.02	0.01	36%	77%	35%	61%	39%	17%
99	Activities of extraterritorial organisations and bodies	0.17	0.16	1%	46%	14%	10%	14%	49%
TOTAL		221.59	185.02	17%	47%	14%	18%	22%	27%

Source: Eurostat, European Labour Force Survey 2008, annual averages.
Notes:
EMPLOYED: number of persons employed, in millions
EMPLOYEES: number of employees, in million
SELF: share of self-employed and family workers in % of total employment
WOMEN: share of women among total employees, in %
TEMP: share of employees with temporary contracts among total employees, in %
PART: share of employees working part-time among total employees, in %
LOW: share of low-skilled employees among total employees, in %
HIGH: share of high-skilled employees among total employees, in %

ANNEX 12: List of abbreviations

ACI	Airports Council International
ACT	Association of Commercial Television
AEA	Association of European Airlines
AER	Association of European Radios
AMICE	Association of Mutual Insurers and Insurance Cooperatives in Europe
APEP	European Association of Potash Producers
ATCEUC	Air Traffic Controllers European Unions Coordination
ATM	Air traffic management
ATSEP	Air Traffic Safety Electronics Personnel
BIPAR	European Federation of Insurance Intermediaries
CANSO	Civil Air Navigation Services Organisation
CAP	Common Agriculture Policy
CEA	European Federation of National Insurance Associations
CEC	Confédération européenne des Cadres
CEFS	European Committee of Sugar Manufacturers
CEEP	European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest
CEI-Bois	European Confederation of Woodworking Industries
CEMR	Council of European Municipalities and Regions
CEPI	European Coordination of Independent Producers
CER	Community of European Railway and Infrastructure Companies
CESA	Community of European Shipyards' Associations
CoESS	Confederation of European Security Services
COGECA	General Confederation of Agricultural and Fisheries Co-operatives
COPA	Confederation of Agricultural Organisations in the European Union
COTANCE	European Confederation of National Associations of Tanners and Dressers
CSR	Corporate Social Responsibility
EACB	European Association of Co-operative Banks
EAEA	European Arts and Entertainment Alliance
EBA	Everything but Arms
EBC	European Builders Confederation
EBU	European Union of Broadcasters
EBU	European Barge Union
ECA	European Cockpit Association
ECA	European Club Association
ECEG	European Chemical Employers' Group
ECSA	European Community Ship-owners' Association
ECSC	European Coal and Steel Community
EFBWW	European Federation of Building and Woodworkers
EFCI	European Federation of Cleaning Industries
EFFAT	European Federation of Food, Agriculture and Tourism Workers
EFIC	European Furniture Industries Confederation
EFJ	European Federation of Journalists
EIM	European Rail Infrastructure Managers
EMCEF	European Mine, Chemical and Energy Workers' Union
EMCF	European Mine, Chemical and Energy Workers' Union
EMF	European Metalworkers' Federation
EPFL	European Professional Football Leagues Association
EPSU	European Federation of Public Service Unions
ERA	European Regions Airline Association
ESBG	European Saving Bank Group
ESO	European Skippers' Organisation
ESTEP	Steel Technology Platform
ETF	European Transport Workers' Federation
ETNO	European Telecommunications Network Operators' Association
ETS	Emission Trading Scheme
ETUC	European Trade Union Confederation
ETUF: TCL	European Trade Union Federation: Textile, Clothing, Leather
EU	European Union

EUPG	European Aggregates Association
EURACOAL	European Association for Coal and Lignite
Eurociett	European Confederation of Private Employment Agencies
EuroFIA	European Federation of Artists and Actors
EURO-MEI	Media and Entertainment International-Technical Professions of the Entertainment Sector
EUROMINES	European Association of extractive industry Industries, Metal Ores and Industrial Minerals
EUSTAFOR	Confederation of European Paper Industries and the European State Forest Association
FBE	The Banking Committee for European Social Affairs European Banking Federation
FERCO	European Federation of Contract Catering Organisations
FIAPF	The International Federation of Film Producers Association
FIEC	European Construction Industry Federation
FIM	International Federation of Musicians
FTP	Forest-based Sector Technology Platform
GATS	General Agreement on Trade in Services
GEOPA	Employers' Group of Agricultural Organisations in the European Union
HOSPEEM	European Hospital and Healthcare Employers' Association
HOTREC	Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments
IACA	International Air Carrier Association
IAHA	International Aviation Handlers' Association
ICEM	the International Federation of Chemical, Energy, Mine and General Workers' Unions
ICT	Information Communication Technology
IFJ	International Federation of Journalists
ILO	International Labour Organisation
IMA-Europe	European Industrial Minerals Association
IRU	International Road Union
IUF	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations
MSD	musculo-skeletal disorders
OSHA	Occupational Safety and Health Administration
PEARLE	Performing Arts Employers Association League in Europe
POSTEUROP	Association of European Public Postal Operators
REACH	Registration, Evaluation, Authorisation and Restriction of Chemical substances
RFID	Radio frequency identification
SAI	Social Accountability International
SME	Small and medium sized enterprise
SSDC	Sectoral Social Dialogue Committee
UCLG	United Cities and Local Governments
UEA	European Federation of Building and Woodworkers
UEAPME	European Association of Craft and Small- and Medium-Sized Enterprises
UEFA	Union of European Football Associations
UITP	International Association of Public Transport
ULCOS	Ultra Low CO2 Steelmaking
WTO	World Trade Organisation

European Commission

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