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Project V/001/97**

**Sectoral Unions and Employers Organisations
in the EU agricultural sector**

Final Report

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Le contenu de la présente publication ne reflète pas nécessairement l'avis de la Direction Générale de l'Emploi et des Affaires sociales de la Commission européenne. Cette étude a été réalisée par des experts indépendants et son contenu n'engage en rien la responsabilité de la Commission. Par ailleurs, les organisations européennes concernées ont eu la possibilité de faire des remarques sur le contenu de l'étude avant sa version définitive.

Disclaimer

The contents of this publication do not necessarily reflect the opinion or position of the European Commission, Directorate-General Employment and Social Affairs. This study has been carried out by independent experts. It therefore does not involve the Commission's responsibility in any way. The European organisations subject of this study have had the opportunity to comment on the content of this study before its final approval.

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1. Introduction

This paper is the 17th report arising out of the study commissioned from the Institut des Sciences du Travail (IST) at the Catholic University of Louvain by the European Commission services, DGV, following call for tenders No V/001/97. This report seeks to provide the Commission with empirical data that will facilitate an assessment of the institutional representative status of European employers' and employees' organisations in the sector in the 15 Member States of the EU. It follows on from other research in the same field, but focuses particularly on organisations recognised as 'social partners' in the intersectoral level in each EU country, organisations affiliated to the CEC¹ and to Eurocadres, and organisations that sign collective agreements in the construction, textiles and commerce sector. We will next tackle specifically the HORECA (hotels, restaurants and cafés) and local public service sectors.

The context

In a Communication² published in 1993, the European Commission set out three criteria determining the access that employers' and employees' organisations had to the consultative process under Article 3 of the Agreement on Social Policy. According to the terms of this Article, organisations must '*1. be cross-industry or relate to specific sectors or categories and be organised at European level; 2. consist of organisations which are themselves part of Member States' social partner structures and with the capacity to negotiate agreements, and which are representative of all Member States, as far as possible; 3. have adequate resources to ensure their effective participation in the consultation process*³'.

A subsequent Communication published in 1998⁴, introduced the concept of '*Sectoral Dialogue Committees*'; these were intended to replace the existing *Joint Committees* and *informal working groups* that had hitherto been the *locus* of sectoral relations between employers and employees at a European level. The role of these latter bodies at the present time is, without prejudging its future extension, essentially consultative, as happened at intersectoral level. As regards an extension to their competence, each Committee '*(a) shall... be consulted on developments at Community level having social implications, and develop and promote the social dialogue at sectoral level*⁵'.

It follows that the setting up of these Committees is an extension of the process of social dialogue at European sectoral level, albeit relying on an existing system. Before the Communication from the Commission was published, there were 9 Joint Committees and 11 informal groups in existence. By 1 February 1999, 21 applications from employers' and employees' organisations had been forwarded to the Commission⁶: they came from sectors as varied as agriculture, road transport, postal services, commerce, and hotels, restaurants and cafés.

¹ Confédération Européenne des Cadres.

² COM(93) 600 final of 14 December 1993, Communication from the Commission concerning the application of the Protocol on Social Policy presented by the Commission to the Council and the European Parliament, Luxembourg, Office for Official Publications of the European Communities, §24.

³ For a more in-depth discussion of these criteria, we refer the reader to the first study, which focused on employers' and employees' organisations at an 'intersectoral' level.

⁴ Communication from the Commission concerning the application of the Protocol on Social Policy presented by the Commission to the Council and the European Parliament *Adapting and promoting the social dialogue at Community level* COM(98)-322 of 20 May 1998, Luxembourg, Office for Publications of the European Communities Annex II.

⁵ Op cit §2.

⁶ Source: Weber T, *New era in sectoral social dialogue takes shape*, in EIRO online, Dublin, European Foundation for the Improvement of Living and Working Conditions, 1998 (<http://www.eiro.eurofound.ie/1999/02/features/eu9902150f.html>).

The conditions of membership for the employers' and employees' organisations that might be encouraged to join these Committees, and/or file a joint application for one to be set up, are linked, as at the intersectoral level, to the notion of representative status, and are broadly similar to the those articulated above in the 1993 Communication. The criteria governing Social Dialogue Committees state that:

*'(a) they shall relate to specific sectors or categories and be organized at European level; (b) they shall consist of organizations 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; (c) they shall have adequate structures to ensure their effective participation in the work of the Committees.'*⁷

As may be observed, the changes focus on the disappearance of demands relating to the intersectoral nature of organisations and on the fact that they are established in all the Member States; although the new rules have not been formulated in a very restrictive manner, they only require employers' and employees' organisations to represent *several* Member States. This relaxation of the implantation condition might eventually pose a demarcation problem in the sense that there is no criterion setting out a minimum number of Member States to activate it. For a more in-depth discussion of these criteria and of the problems that they may pose, we refer the reader to the first study carried out as part of this research⁸.

However, we wish to make it clear that the framework of the IST report will only examine the *institutional consequences* that flow from the recognised or unrecognised representative status of members affiliated to a European organisation. Furthermore, on a theoretical plane, with regard to the various national traditions in this field, representative status – or, more accurately, *recognition of the legitimacy of a social partner organisation* to negotiate collective agreements or take part in the development of social or labour market policies – may be interpreted in any number of ways ranging from the ability to mobilise the activist grass roots effectively, through systems of mutual recognition (in the strict sense of the phrase, in which no criterion is defined), to quantitative thresholds linked to the outcomes of trade union elections. These various systems of recognition, and the extent of the problems of definition that they can pose within each country, will be the subject of a comparative analysis in the course of the coming year.

The approach

In this context, therefore, the research aim as far as existing sectoral committees are concerned will be mainly to provide empirical data that will make possible an assessment of the institutional representative status of the organisations that sit on them, and on the basis of the three afore-mentioned criteria. More specifically, this report will examine employers' and employees' organisations active in the agricultural sector. As far as we are aware at the present time, only two organisations have filed applications with a view to initiating a process of social dialogue in the sector at European level. At a national level, in order to take account of the diversity of the various recognition mechanisms, we will only consider organisations that *participate in collective bargaining*, and which therefore one way or another have *ad hoc* recognition in the sectors referred to. The only exception to this rule concerns organisations that are affiliated to one or other of the European federations that are directly the focus of our research.

⁷ COM(98)322 of 20 May 1998, §1.

⁸ Spineux A., Walthéry P. et al, Report on the representativeness of European social partner organisations, Report coordinated by the Institut des Sciences du Travail of the Catholic University of Louvain, for the European Commission Directorate-General for Employment, Industrial Relations and Social Affairs, Louvain-la-Neuve, 1998, pp.3-7.

However, it is important to bear in mind that in some countries, the sectoral is not mainly, or not at all, the main level of collective bargaining; this structure has accordingly had to be adjusted. In the United Kingdom, and to a lesser extent in Ireland, most bargaining takes place at enterprise level. In Ireland, though, the existence of *Joint Industrial Councils* and *Joint Industrial Committees* that fix minimum conditions of employment and pay for certain categories of enterprise and employee (their members are the main employers' and employees' organisations which also coordinate enterprise-level negotiations) makes it possible to get round the problem by giving indications about the importance of the recognition that they enjoy. In the UK, much wider scope has been given to teams of researchers to assess the main organisations that coordinate enterprise-level bargaining. Lastly, in Greece, sectoral bargaining has a much shorter history with professional (i.e. job category-based) and/or local levels playing a dominant role. However, an institutional framework does exist, and collective agreements have been negotiated at sectoral level since the early 1990s; this makes it possible to identify the leading actors at this level, even if it is still marginal. With the exception of the above, organisations, irrespective of their importance, that do not sign collective agreements are NOT covered in this report.

On the other hand, the list of organisations that are studied is not limited to members of European bodies that have presented joint demands for the setting up of Sectoral Social Dialogue Committees. Within reason, and on the basis of available information, we address all collective bargaining actors in the sectors under examination, as this enables us to draw a collective bargaining 'map' for each of the Member States.

The response

For the purposes of this research, a network has been established of 15 European university researchers⁹ who were independent of both the European Commission and the social partners. The network was given the task of drawing up a report based on a common structure of organisations matching the above criteria in each of the Member States. The IST coordinating team then collated information that had been gathered for the purposes of comparative analysis. Ongoing collaboration is planned between the coordinating team and the national experts. The aim of the process is simultaneously to carry out a 'top-down' approach at European level and a 'bottom-up' approach at Member State level; the IST will also directly collate information about each of the European organisations studied. Lastly, the report will undergo a double check by the Commission's services, and by the European organisations that are themselves being studied, before it is approved.

It is worth noting that the IST team with responsibility for coordinating the work and for editing the summaries and comparative analyses, and the 15 national experts wish to stress their complete independence as to the political consequences and the decisions that might be reached from this study. Their role is limited to contributing as much data as possible, with a view to both making the three criteria of representative status defined by the European Commission intelligible and documenting them.

The structure of the report will then proceed as follows: firstly, we will give consideration to aspects of the sector, and to differences with regard to collective bargaining that might exist from one EU country to another; then, we will present characteristics of members affiliated to the two organisations being studied by examining each of them in respect of:

⁹ See list above.

Quantitative aspects of representative status

- *Employers' organisations*: number of affiliated organisations; number of enterprise members; staff employed in these enterprises, and the rate of affiliation calculated on the basis of employee numbers; if necessary, the detailing of particular characteristics of the organisation and its members (e.g. SMEs).
- *Employees' organisations*: number of affiliated organisations; number of employee members; rate of affiliation; types of employee affiliated (e.g. white-collar/blue-collar, managers and skilled workers).

Recognition

- Does the organisation participate in collective bargaining, consultation (with the government) and the joint management of sectoral funds?
- Challenges to representative status: in the event of particular developments (e.g. the emergence of new organisations that challenge those already established in the sector, or a significant fall in membership), the expert will give a brief description of what has happened, the issues and current trends.

National and European affiliations

- List of high-level, national bodies to which the organisation is directly or indirectly affiliated.
- List of European bodies to which the organisation is directly or indirectly affiliated.

Lastly, in respect of each Member State, we will present a summary of the organisations established there, and a more detailed description of their characteristics.

2. The EU Agriculture Sector

2.1 Activities included in this sector

Broadly speaking, the economic activity concerned encompasses all agricultural activities listed in NACE Category A 01¹⁰, that is to say the growing of cereals and horticulture, the breeding of animals and services related to agriculture. However, although hunting comes under NACE Category 01, it appears among activities covered by agriculture in some countries, and not in others. As for activities in NACE Categories A 02 and B 05, only forestry and related services find their way into the statistics for agricultural activities as far as most of the countries studied are concerned. Under agriculture, category B 05 only marginally concerns what is generally referred to as fishing. In practice, though, in a study of the agriculture sector, deep-sea fishing is clearly not a relevant activity. The nuances are more subtle in respect of other sub-branches: in France, for example, there could be distinctions between the breeding of molluscs continually covered by the sea (and therefore coming under deep-sea activity) and breeding covered by water and carried along by the tide. Only the latter will be deemed to form part of agricultural activity. In fish farming, a distinction will be drawn between fresh-water and deep-sea breeding. Where these activities are covered by negotiations on agriculture, they will be referred to in the context of the countries concerned.

The activities that are covered by the negotiating procedure for the agriculture sector, and which therefore form part of the statistics referred to, will be highlighted in respect of each country.

Summarised table: Number of workers – activity covered by collective bargaining

Country	Total employment	Employees	Number of seasonal workers	Self-employed ¹¹	Scope of collective bargaining (using NACE Categories)	Coverage ¹²
Germany	988,000**	596,000	300,000	392,000	01, 02	NA
Austria	235,000**	45,191	23,837	189,809	01, 02, 05	99.9%
Belgium	86,000**	30,081 65,625*	50,250*	20,375	01	100%
Denmark	99,000**	84,343	-	14,657	01	50% (estimated)
Spain	900,000	330,000	-	570,000	01.1 to 01.3, 02	+/- 75%
Finland	91,871	54,000	40,000*	39,000	01	70%
France	993,000**	800,000	550,000*	450,000	01	100%
Greece	670,000	25,199	-	439,914	01, 02, 05	90%
Ireland	270,000	123,800	-	146,200	01	-
Italy	1,120,000	451,000 916,721*	-	669,000	01	NA
Luxembourg	10,646	742	-	9,904	01	-
Netherlands	270,000	120,000	-	150,000	01	82%
Portugal	1,236,214 653,000**	513,071	-	723,000	01, 02	100%
United Kingdom	463,000**	200,000	73,000**	263,000	01, 02	-
Sweden	120,000**	22,300	-	121,000	01.1 to 01.4	>70%

Source: * data supplied by Geopa-Copa for 1999

** data supplied by Eurostat 1999 for 1998

¹⁰ See Annexes for more information on the activities covered by the various NACE Categories.

¹¹ Where the number of self-employed workers has not been notified by the national expert, it has been estimated by calculating the difference between 'Total employment' and the number of 'employees' (marked in *italics*). If family members (i.e. unpaid workers) are included under Total employment, they will be found in the estimated figure for self-employed workers. For this reason, the figures may be at odds with those supplied by Eurostat.

¹² Covered by a sectoral agreement. For countries where agreements are concluded at enterprise level, there is no mention for the coverage (-).

2.2 Categories of employee

The concept of 'employee' is not always an easily identifiable characteristic in agriculture, the sector incorporating a very large number of farm jobs in relation to the number of workers. The people working on these farms usually consist of the farmer himself, who is usually self-employed, and employees helping him. The people helping him normally consist of family members, and on some farms they are joined by waged workers (dependent workers), both permanently employed and seasonal, and full-time or part-time. In some countries, seasonal workers may account for a substantial proportion, even a majority, of the waged labour force, particularly during the high season. This waged labour force is not always easily quantifiable in terms of the informal economy or unauthorised immigration; indeed, unauthorised immigrants include not only seasonal workers, but also permanently employed workers.

Most dependent workers in the sector fall into the blue-collar category; only a small proportion of workers are white-collar, self-employed workers who manage their own businesses not being classified as such. Even though these people are usually included in the total number of workers in the sector ('Total employment'), it is important not to forget that they are likely to be 'employers', and will therefore be represented by employers' associations.

That is why we have drawn a distinction, so far as it is possible, between the global number of workers in the sector and the number of employees (*'dependent workers'*).

There were about 7.4 million people working in the agriculture sector (i.e. agriculture, hunting, forestry and fishing) in 1997; of these, 7.2 million were working in agriculture proper (i.e. excluding fishing)¹³.

2.3 Collective agreements

Collective agreements are negotiated and concluded in a variety of ways. The agreements themselves are negotiated either for the whole sector, or by sub-sector, and at national or regional level, or even at enterprise level. Practices vary from country to country. The agreements that flow from these negotiations may, or may not, be extended to all workers in the sector/region concerned.

In Greece, the only agreement that has been concluded applies to the entire agriculture sector, and is extended to all who work in it. In Austria, distinct collective agreements are concluded as regards the employers and also as organisations conclude collective agreements that are differentiated according to the category of employee. In Belgium, France, Denmark, Finland and Sweden, negotiated sub-sectoral agreements regulate agricultural activity through separate agreements covering the sector's various activities (e.g. agriculture, horticulture, and agricultural and horticultural jobs of a technical nature). These agreements are normally extended to all workers in the sectors concerned, either by law (Belgium, France and Finland) or by means of voluntary mechanisms (Denmark and Sweden). In addition to covering each sub-sector separately, negotiated agreements may also be complemented by agreements concluded at regional level. Examples of this are to be found in Germany, the Netherlands, Spain, Portugal and Italy. In Ireland and the United Kingdom, the sector is governed by company agreements; in Luxembourg, there are no collective agreements in the agriculture sector at all.

¹³ Source: Eurostat.

2.4 The Sectoral Social Dialogue Committee

The only two recognised European organisations of social partners are the *European Federation of Food, Agriculture and Tourism Workers (EFFAT)* and the 'Groupement employeurs des organisations professionnelles agricoles de l'Union Européenne – Confédération des organisations professionnelles agricoles de l'Union Européenne' (GEOPA-COPA), *the Employers' Group of the Committee of Agricultural Organisations in the European Union (COPA)*.

There is a long tradition of sectoral social dialogue in the agriculture sector. The organisations active in agriculture have been the forerunners since the framework agreement¹⁴ was signed in 1997 (other agreements were already reached before on working time, in 1968 and 1981). Indeed, although not legally binding, the 1997 framework agreement was the first sectoral agreement concluded between the social partners at European level. Apart from this accord, which recommended terms and conditions of employment in agriculture, significant recent outcomes¹⁵ include the White Paper on vocational training in agriculture, the Instruction Manual for spraying machine operators, and the Safety Manual for forestry¹⁶.

In April 1999, EFFAT (then still known as EFA) and its social partner, the GEOPA-COPA, put in a joint request for the setting up of Social Dialogue Committee in agriculture. They both rejected a tripartite system in which the Commission would play the role of European government partner¹⁷. The Commission has therefore only played the role of moderator, and assisted the social partners in organising their work.

2.5 Methodological observations

We wish to draw the reader's attention to the quantitative data and the wide range of sources. In addition to the figures supplied by our network of national experts, there is information provided by national and European organisations and other bodies, and estimates made by the IST on the basis of available data. These estimates need to be viewed with considerable caution, and should only be used to develop a more global view of employment, and of trade union membership at sectoral level.

As far as this statistical data is concerned (and with the exception of the density calculation, which is the outcome of our own calculations), we prefer to use figures that have been sent to us by our national experts. However, when a significant difference is identified between the data notified to us by experts and by other sources such as European organisations (either directly, or indirectly via the questionnaire that they had to complete as part of setting up the Sectoral Dialogue Committee), we refer to the alternative figures sent to us by these organisations in a footnote.

We use *density* as a tool to estimate the quantitative importance of trade unions and employers' associations in the sector. Density is calculated as the total of members (trade unions) or of employees in member companies (employers' associations), divided by the number of employees throughout the sector. In the absence of data relating to the number of employees, total employment figures are used, and self-employed workers are therefore included. However, these figures must be used with the greatest of caution:

¹⁴ Source: European sectoral dialogue, Letter from the European Commission, DGV /D, No 2, November 1997.

¹⁵ Source: Written replies from GEOPA-COPA to supplementary questions from the IST concerning this study.

¹⁶ A complete list: http://europa.eu.int/comm/employment_social/soc-dial/social/euro_agr/index_s11_fr.htm

¹⁷ Source: EFFAT, Financial Report and Activity Report for the years 1997 to 2000, delivered to the 15th EFA Ordinary Congress, Brussels, November 2000.

- total membership should, unless otherwise stated, be understood to mean *the number of workers in the sector concerned who are members of the union*. It is not, therefore, as far as non-specific trade unions in the agriculture sector are concerned, the total number of members in that union;
- given the very large number of self-employed workers in the sector, the use of data relating to employment in the density calculation should be viewed with considerable caution. The results of these calculations have a significant tendency to underestimate the actors' importance;
- in two different cases, density calculations have been carried out using an other method than the standard manner and therefore should not be used in cross-national comparisons:
 - in the case of certain countries like Portugal, no overall sectoral density calculations have been carried out, as there are no global data for the sector. The results derive from estimates made by experts, and are only valid for the sub-sectors concerned. As these results have not been calculated on the same activity sector basis as the other countries, they will not provide any sort of comparison with results in countries where density has been calculated in the standard manner. They are only there to give a gross indication of the representativeness of the various organisations;
 - in Sweden, density has been calculated using the two methods (by sector and by sub-sector/occupation). The reason was to take account of the comments of experts. According to whom, such a sub-sectoral density calculation provides a more reliable picture of real membership levels in the country concerned;
- an organisation's effective importance is not necessarily directly linked to its level of membership; for example, even though membership is low in France and Spain, trade unions enjoy considerable legitimacy there; and in countries like France, the results of Chambers of Agriculture elections may be deemed more significant than the number of members (cf the national summary).

Different typefaces distinguish and clarify the origins of all the data:

- **BOLD**: data from national experts

- ***BOLD ITALICS***: data provided by European organisations or other bodies

- *ITALICS*: estimates based on available data

The 'employees' column to be found in all tables next to the 'country' column gives the number of employees throughout the sector.

The word *employees* refers to dependent workers, except where stated otherwise in national summaries, and thereby excludes owners, self-employed workers and working family members.

3. The actors

3.1 Employees: the European Federation of Food, Agriculture and Tourism Workers (EFFAT)

3.1.1 General features

The *European Federation of Food, Agriculture and Tourism Workers* (EFFAT) has been in existence since 12 December 2000 when the EFA (European Federation of Agricultural Workers' Unions) merged with the ECF-IUF (European Committee for Food, Catering and Allied Workers' Unions within the IUF). EFFAT is an autonomous European trade union federation. It is a member of the ETUC (European Trade Union Confederation), and is a regional organisation of the IUF (International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations). EFFAT is represented in 35 European countries. Affiliation is normally open to all free, autonomous, democratic trade unions in sectors lying within the competence of EFFAT at European level.

Structure¹⁸

EFFAT is made up of a number of bodies:

- ☐ **Congress:** Congress is EFFAT's supreme body. It meets every four years, and is responsible for receiving and approving the activity and financial reports and determining the organisation's overall policy. It also deals with the election of representatives. EFFAT's various member organisations are represented at the Congress in proportion to their membership, and according to a distribution key set out in the Rules.
- ☐ **The Executive Committee:** the Executive Committee is the supreme body of EFFAT between Congresses. Meetings are held at least twice a year. Nominations of the representatives from each country are made after a previous vote by each country's member organisations, and according to a distribution key set out in the EFFAT Rules. The Executive Committee decides on the measures needed to implement the resolutions and programmes adopted by Congress, or by the Executive Committee itself. The Executive Committee also carries out certain tasks such as the nomination of EFFAT representatives to EU Consultative Committees.
- ☐ **The Management Committee:** the Management Committee decides on urgent action required to carry out policies determined by the Executive Committee. It meets at least four times a year. The Management Committee also deals with financial and administrative issues.
- ☐ **Sectoral Assemblies and Boards:** the Assemblies are formed to deal with sector-specific tasks, and include the Assembly on Agriculture, the Assembly on Food and the Assembly on Tourism; their main role is to implement the Federation's trade union objectives in the sectors concerned. As a rule, they meet at least once a year and/or as required. Each Assembly has a Sectoral Board and a Chairman/Chairwoman.
- ☐ **The Secretariat:** the Secretariat consists of the General Secretary and the Sectoral Secretaries. Its main task is to represent the organisation at the level of European Institutions, and to coordinate and develop sectoral and inter-sectoral dialogue and trade union work.

¹⁸ Source: EFFAT, Rules agreed at the 1st EFFAT Congress, Luxembourg, 11 December 2000.

3.1.2 Representative base

Membership figures

Country	Employees	Name	Membership	Density*	CB	National affiliation	European affiliations (except EFFAT) – indirect
Austria	45,191	GANG	42,841 ¹⁹	NA	Yes	ÖGB	ETUC
		GPA	5,600	12.3%	Yes	ÖGB	ETUC
		GÖD	550	1.2%	Yes	ÖGB	ETUC
Belgium	30,081	CCAS	6,477	21%	Yes	CSC	ETUC
		Green Sectors FGFB	2,400	7.9%	Yes	FGTB	ETUC
Denmark	101,605	Sid GLS groups	14,000	13.78%	Yes	LO	ETUC
Finland	54,000	PUU-Ja	9,000	16.7%	Yes	SAK	ETUC, EFBWW
France ²⁰	800,000	FNAF-CGT	1,700	0.21%	Yes	CGT	-
		FGA-CFDT	2,500-3,000	0.38%	Yes	CFDT	ETUC
		CFTC	1,800	0.23%	Yes	CFTC	FEMTA
		FGTA-FO	6,150	0.81%	Yes	FO	ETUC
Germany	600,000	IG Bauen-Agrar-Umwelt	56,511	9.5%	Yes	DGB	ETUC
Greece	25,199	OSEGO	9,629	38%	Yes	GSEE	ETUC
Ireland	123,800	SIPTU	7,000	5.6%	Yes	ICTU	ETUC, ECF, EMCF, EMF, IUJ
		IVU	665	0.5%	Yes	ICTU	ETUC
Italy	451,000	FLAI	309,524*	27.6%**	Yes	CGIL	ETUC
		FISBA	179,311*	16%**	Yes	CISL	ETUC
		UGC	67,752*	6%**	Yes	CISL	ETUC
		UILA	142,192*	12.7%**	Yes	UIL	ETUC
		UIMEC	41,869*	3.7%**	Yes	UIL	ETUC
Luxembourg	742	OGB-L	286	38%	Yes	CGT-L	ETUC
		LCGB	NA	NA	Yes	LCGB	ETUC
Netherlands	120,000	FNV Bondgenoten	17,000	14.2%	Yes	FNV	ETUC
		CNV Bedrijvenbond	6,800	5.7%	Yes	CNV	ETUC
Portugal	504,043	SETAA	17,080	3.4%	Yes	UGT	ETUC
United Kingdom	+/-200,000	RAWW	20,000	10%	Yes	TGWU, TUC	ETUC
Spain	330,000	FTT-UGT	26,500	8%	Yes	UGT	ETUC
		FA-CC.OO	20,000	6%	Yes	CC.OO	ETUC
Sweden	22,300	SLF – LO	7,000	32%	Yes	LOI	ETUC
		SLF – TCO	477	5.6%	Yes	TCO	ETUC, EUROCADRES
		HTF	400	1.7%	Yes	TCO	ETUC, EUROCADRES
		SIF	400	1.7%	Yes	TCO	ETUC, EUROCADRES

Note: For more information, please consult the national summaries.

*These figures include certainly more than the only employees' category

**Density is estimated on the total employment

EFFAT's agricultural branch consists of 32 affiliated trade unions in 15 member countries of the European Union. It represents at least 285.000 without considering Italian employees, and missing figures for GANG (Austria) and the FNAF-CGT (France) need to be added. EFFAT therefore has a virtual monopoly of national affiliations to a European sectoral union in the agriculture sector at European level.

¹⁹ Members of the agriculture and agri-food sector. There are no specific data available for agriculture.

²⁰ Cf 2.5 Methodological observations

Most trade union members of the EFFAT are themselves members, directly or indirectly (via their national affiliation), of the ETUC. However, all EFFAT members may be deemed to be indirectly affiliated to the ETUC via the EFFAT's direct affiliation.

All trade unions affiliated to the EFFAT play roles in negotiating collective agreements.

Representativeness challenged

A few trade unions in addition to these EFFAT affiliates take part in collective bargaining. There are 15 of them. They fall outside EFFAT, and are not covered by any other European sectoral organisation. They represent a total of about 19,932 members, to which must be added members in the CGC in France, Confederdia in Italy, and VHP BVVN in the Netherlands. This minor lacuna in the representativeness of the EFFAT is due to substantial membership in non-affiliated trade unions (SNCEA-CGC, VOA, ANDAA, Confederdia, De Unie, VHP BVVN, SVF, CF and Ledarna) that represent specific categories of employee (i.e. mostly professional and managerial staff).

At all events, the combined membership of these trade unions is likely to be relatively small compared with the total membership of EFFAT member organisations involved in collective bargaining.

Non-EFFAT member organisations involved in the negotiation of agreements

Country	Employees	Name	Membership	Density	CB	National affiliation	European affiliations – indirect
Belgium	30,081	CGSLB	438	1.5%	Yes	CGSLB	CESI
Denmark	101,605	Kristelig fagforening	270	0.27%	Yes ²¹	-	-
France	800,000	SNCEA-CGC	NA	NA	Yes	CFE-CGC	CEC
		FGSOA	12,000	1.5%	Yes ²²	UNSA	ETUC
		STCPOA	NA	NA	Yes	-	-
Ireland	123,800	VOA	315	0.2%	Yes	ICTU	ETUC
Italy	451,000	Confederdia	NA	NA	Yes	Confederdia	-
		ANDAA	1,500	0.13%	Yes	CIDA	CEC
Netherlands	120,000	De Unie	219	0.1%	Yes	UOV, Unie MHP	ETUC
		VHP BVVN	NA	NA	Yes	UOV, Unie MHP	ETUC
Portugal	504,043	SNTTAFP ²³	4,000	NA	Yes	CGTP-IN	FSA
Sweden	22,300	Agrifack	500	2.2%	Yes	SACO	ETUC, EUROCADRES
		SVF	250	1.1%	Yes	SACO	ETUC, EUROCADRES
		CF	20	0.08%	Yes	SACO	ETUC, EUROCADRES
		Ledarna	420	1.9%	Yes	-	CEC

3.1.3 Recognition

These trade unions are not represented by another sectoral organisation at European level. EFFAT is therefore the only sectoral European organisation that represents the interests of waged workers in the agricultural sector.

²¹ The Kristelig fagforening has a single agreement in the agriculture sector with the Kristelig Arbeidsgiverforening. They are both independent organisations that do not take part in any other collective bargaining.

²² The FGSOA does not take part in collective bargaining in certain areas. This is done by the CFDT-CGT-FO-CFTC-CGC confederation.

²³ This is our acronym for the Sindicato Nacional dos Trabalhadores e Técnicos da Agricultura, Florestas e Pecuária (National Union for Workers and Technicians in Agriculture, Forests and Fisheries).

The employers

3.2 The Employers' Group of the Committee of Agricultural Organisations in the European Union (GEOPA - COPA)

3.2.1 General characteristics

As in other sectors, the main European organisation, the GEOPA-COPA, is the only genuine interface on the Social Dialogue Committee. It represents enterprises active in all areas of the agriculture sector, and works through member organisations in the 15 Member States of the European Union.

The COPA delegates to GEOPA to represent vis-à-vis EU authorities and the agricultural organisations of employees, the employers of workers, members of the professional agricultural organisations, for all that relates to specific interests of the employers in the social field.

Structure²⁴

GEOPA-COPA is composed of various bodies:

□ **The Board of Directors:** It is composed of 28 regular members and of as many substitutes:

3 regular members and 3 substitutes for each of the following countries: Germany, Spain, France, Italy and The United Kingdom.

2 regular members and 2 substitutes for each of the following countries: The Netherlands, Denmark and Sweden.

1 regular member and 1 substitute for each of the following countries: Greece, Ireland, Luxembourg, Belgium, Portugal, Finland and Austria.

Moreover are added alone President and Vice-President who can be elected among the 28 members to the board of directors. In this case, the organisations from which they come choose two other members. The board of directors has the capabilities necessary to manage the Group and to act in its name. There is at least one meeting a year called by its President on convocation. Resolutions of the Board of Directors of the Group are subjected to the Presidium of the COPA. The board of directors can validly deliberate only in presence of at least 15 on its regular members and substitutes who represent the agricultural organisations of employers of at least 7 countries. The deliberations are acquired when there is a vote with qualified majority. The voices of the whole of the representatives of the organisations of a country are affected by a weighting: Germany, Spain, France, Italy and United Kingdom: 12 votes; Austria, Belgium, Denmark, Greece, The Netherlands and Sweden: 6 votes; Finland, Ireland and Portugal: 4 votes; Luxembourg: 2 votes.

□ **The Office:** The Board of Directors elects an office of 8 members coming from the different countries. It is composed by one president, two Vice-presidents, a treasurer and 4 members. The term of the Office is two years, but the member's mandates are renewable. The office is responsible for the current management of the Group and has to account to the Board of Directors. The group has a secretary which is organised by the President in agreement with the secretariat of the COPA. The Office will allot its functions.

²⁴ Source : Internal settlement of The Employers' Group of the Committee of Agricultural Organisations in the European Union (GEOPA - COPA), Brussels, 1993 and endorsements with its settlement of the 4th October 1995, 23rd February 1998 and 21st February 2000.

3.2.2 Representative base

Membership figures

Country	Employees	Employers	Enterprises	Employees	Density	NC	National affiliation	European affiliations (apart from GEOPA-COPA) – indirect
Austria	45,191	OLAF	931	NA	NA	Yes	OLAF	-
Belgium	30,081	Boerenbond	17,000	NA	NA	Yes	-	-
		FWA	11,000	NA	NA	Yes	-	-
		FHPB ²⁵	1,800	NA	NA	Yes	Boerenbond	ENEA
Denmark	101,605	GA ²⁶	530	8,000	8%	Yes	SALA	CEDEFOP
		LSA ²⁷	100	12,000	12%	Yes	SALA	CEDEFOP
Finland	54,000	MTL	1,024	9,000	16.7%	Yes	TT	UNICE
France	800,000	FNSEA	135,000	NA	NA	Yes	FNSEA	CEA
Germany	600,000	Gesamtver, ²⁸	NA	NA	NA	Yes*	-	-
Greece	25,199	PASEGES	7000 coop,	800,000**	NA	Yes	-	CEA
		GESASE	49 org,	300,000**	NA	No	-	SEJA, EESC
Ireland	123,800	IFA	8,000	85,000	68%	Yes	IBEC	UNICE
Italy	451,000	Coldiretti	568,000	1,200,000**	NA	Yes	Coldiretti	-
		Confagricoltura	685,000	1,491,000**	NA	Yes	Confagricoltura	CEA
		CIA	880,023	1,473,784**	NA	Yes	CIA	-
Luxembourg	742	CP ²⁹	NA	NA	NA	No	-	-
Netherlands	120,000	LTO Nederland	74,000	30,000	25%	Yes	LTO	-
		NBVB	1,850	NA	NA	Yes	-	-
		CNC	450	4,300	3.5%	Yes	-	-
		NVO	20	3,300	2.75%	Yes	-	-
		LCB	17	11,404	9.5%	Yes	AWVN	-
Portugal	504,043	CAP	314 org,	NA	NA	Yes	-	CEA
United Kingdom	+/- 200,000	NFU	70,000	NA	NA	Yes	NFU	-
		NFU Scotland	9,500	NA	NA	Yes	CBI	UNICE
		UFU	13,000	NA	NA	Yes	CBI	UNICE
Spain	330,000	ASAJA	NA	NA	NA	Yes	CEOE	UNICE
		COAG-IR	NA	NA	NA	Yes	-	-
		UPA	70,000	NA	NA	Yes	UGT	-
		ASEPRHU	150	NA	NA	Yes	ASAJA, CEOE	EUWEP, UNICE
Sweden	22,300	SLA	3,000	12,500	56%	Yes	SAF	UNICE

Notes: * through regional members

** This figure includes employees, self-employed professionals, firm owners and working family members

org.: organisations; coop.: co-operatives

GEOPA-COPA has about 31 employers' associations in membership. It has a virtual representational monopoly of employers' associations at European level, and plays a leading role in sectoral negotiations in agriculture at this level. It is not easy to give an exact global figure for the number of employees distributed in the member enterprises of employers' associations affiliated to the GEOPA-COPA as some mainly notify the number of firms that they represent, and do not give the number of workers that these

²⁵ FHPB: our acronym for Fédération des Horticulteurs et Pépiniéristes de Belgique.

²⁶ GA: our acronym for Gartnerbrugets Arbejdsgiverforening.

²⁷ LSA: our acronym for Land og Skovbrugets Arbejdsgivere.

²⁸ Gesamtverband der Deutschen Land- und Forstwirtschaftlichen Arbeitgeberverbände

²⁹ CP: our acronym for Confédération Paysanne.

enterprises employ. However, it is estimated as representing a large proportion of the employees in the 15 Member States of the EU.

The overwhelming majority of national employers' association members of the GEOPA-COPA are involved in the negotiating of collective agreements. However, there are two national employers' associations that do not do so: one is the Luxembourg association (unable to participate in such activities as it has no locus in the agriculture sector in Luxembourg in the strict sense); the other, the GESASE, is Greek.

The number of employees not represented in collective bargaining at national level by these two organisations is insignificant. Enterprise members of the Luxembourg organisation, Centrale Paysanne, or of the Greek organisation GESASE employ small workforces. There are two Greek employers' associations, but GESASE is smaller than the main one. Although the representativeness of Greek enterprises in national negotiations is weakened by this shortcoming, it is still satisfactory.

Representativeness challenged

The GEOPA-COPA is the only European employers' association in the agriculture sector. Although its representativeness is not open to challenge, some organisations that sign agreements are not represented at European level through it. There are 20 of them altogether.

We list these organisations in the table below.

Organisations not members of the GEOPA-COPA, but involved in negotiating agreements

Country	Employees	Name	Enterprises	Employees	Density	NC	National affiliation	European affiliations – indirect
Belgium	30,081	ARCSH ³⁰	200	NA	NA	Yes	ABS	-
		CNAS - NCAS ³¹	300	NA	NA	Yes	Unizo	CEETTAR, UEAPME
Denmark	101,605	KA ³²	103	600	0.5%	Yes	Håndværksrådet	UEAPME
France	800,000	CP ³³	NA	NA	NA	Yes	-	CPE
		MODEF	NA	NA	NA	Yes	-	CPE
		FFA ³⁴	NA	NA	NA	Yes	-	FEAP
		SNA	NA	NA	NA	Yes	-	-
		SNGP	NA	NA	NA	Yes	-	-
Germany	600,000	AALG ³⁵	NA	NA	NA	Yes	BDA	UNICE
		AGA ³⁶	NA	NA	NA	Yes	BDA	UNICE
Ireland	123,800	ICMSA	NA	30,000	24%	Yes	-	-
		ICOS	30-40	3,000	2%	Yes	-	-
Netherlands	120,000	Plantum NL	500	2,400	2%	Yes	VNO-NCW	ESA, UNICE
		VHG	1,155	11,767	9.8%	Yes	VNO-NCW, MKB	ELCA, UNICE, UEAPME
		CUMELA	1,574	13,457	11.5%	Yes	MKB	CEETA, UEAPME
Spain	330,000	FEEJ	NA	NA	NA	Yes	-	-
		PROPOLLO	NA	NA	NA	Yes	FIAB, CEOE	AVEC, UNICE
		SEH	300	NA	NA	Yes	FEPEX, CEOE, CEPYME	EUCOFEL, UEAPME, UNICE

³⁰ ARGSH: our acronym for Association Royale Chambre Syndicale de l'Horticulture/Koninklijke Syndicale Kamer van de Belgische Turnabout

³¹ CNAS-NCAS: our acronym for Centre Nationale Agro-Service/Nationale Centrale Landbouw-Service

³² KA: our acronym for Kristelig Arbejdsgiverforening

³³ CP: our acronym for Coordination Paysanne

³⁴ FFA: our acronym for Fédération Française d'Aquaculture

³⁵ AALG: our acronym for Arbeitsgemeinschaft der Arbeitgebervereinigungen im ländlichen Genossenschaftswesen

³⁶ AGA: our acronym for Arbeitsgemeinschaft der gärtnerischen Arbeitgeberverbände

3.2.3 Recognition

It is difficult to estimate the exact number of employees working for enterprises represented by these organisations. What can, however, be said is that they are not the main employers' associations, and that they only represent a minority of enterprises (from the point of the number of employees) in the European agriculture sector.

Moreover, as no other European organisation represents this sector in its entirety, the GEOPA-COPA's representativeness cannot be called into question on this basis.

National summaries

4.1 Austria

Contextual data

From a collective bargaining viewpoint, the agricultural sector refers to activities gathered under the NACE classification 01, 02 and 05: agriculture, hunting, forestry and fishing. 21.354 (year 1999) seasonal workers are employed in this sector in addition to the 23.837 permanently employed persons.

In 1999 Austria's agricultural sector recorded 217.508 farms of which 36.9 percent, 59.5 percent and 3.6 percent were full-time farms, small-scale farms and farms owned by legal entities (i.e. manor houses and cooperatives).

Companies	Employees	Coverage
217.508	45.191	99.9%

There are two types of employers' associations which are engaged in the sector's collective bargaining: the chambers of agriculture and voluntary sector-related associations. Their peak organisations are the Standing Committee of the Presidents of the Austrian Chambers of Agriculture (*Präsidentenkonferenz der Landwirtschaftskammern*, PKLWK) and the Standing Committee of the Presidents of the Employers Associations of Agriculture (*Obmännerkonferenz der Arbeitgeberverbände der Land- und Forstwirtschaft in Österreich*, OALF). Collective bargaining is conducted by the Länder affiliates of these peaks.

The main differences between these two types of associations are as follows: the chambers of agriculture are based on obligatory membership as all the other chambers in Austria. Furthermore, the membership domain of the chambers embraces all types of farms regardless of whether they have employees. The chambers are the principal representatives of agriculture in Austria, in particular as far as interest representation in relation to the state is concerned. In comparison, both the OALF and its affiliates are voluntary employer associations whose domain covers only farms having employees, with a special focus on the large farms (i.e. the *Gutsbetriebe*).

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Präsidentenkonferenz der Landwirtschaftskammern – PKL WK	All	217.508	NA	100% (obligatory)	Yes (1)	-	-
Obmännerkonferenz der Arbeitgeberverbände der Land und Forstwirtschaft in Österreich – OLAF	Farms having employees	931	NA	Est 95% of farms having employees	Yes	-	GEOPA-COPA

(1) Only the Länder chambers affiliates of this peak organisation are actually involved in collective bargaining. Participation in consultation procedures is a far more important task of the chambers than collective bargaining.

Regional organisations members of OLAF:

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Zentralverband der land- und forstwirtschaftlichen Arbeitgeber in Niederösterreich, Burgenland und Wien	Manor houses Regional companies	350	NA	NA	Yes	OLAF	GEOPA-COPA
Arbeitgeberverband der Land- und Forstwirtschaft in Steiermark	Regional companies	249	NA	NA	Yes	OLAF	GEOPA-COPA
Arbeitgeberverband der land- und forstwirtschaftlichen Betriebe Kärntens	Regional companies	132	NA	NA	Yes	OLAF	GEOPA-COPA
Arbeitgeberverband der land und forstwirtschaftlichen Betriebe Oberösterreichs	Regional companies	140	NA	NA	Yes	OLAF	GEOPA-COPA
Land- und forstwirtschaftlicher Arbeitgeberverband Salzburg	Regional companies	60	NA	NA	Yes	OLAF	GEOPA-COPA

In addition to the employer associations listed above, two single employers each conclude collective agreements on behalf of their own realm. This is the Community of Vienna which runs agricultural undertakings, and the federal forestry company of Austria (*Österreichische Bundesforste AG*)

As a result of this multi-dimensional differentiation of the collective bargaining system, more than 15 collective agreements exist in the sector. Nevertheless, their domains are demarcated in a complementary, non-competing way.

The three unions conducting collective bargaining are all members of the Austrian Trade Union Federation (Österreichischer Gewerkschaftsbund, ÖGB).

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation - indirect
Gewerkschaft Agrar-Nahrung-Genuß – GANG	Blue-collar workers	42.841⁺	NA	Yes	ÖGB	EFFAT, EAL, ETUC
Gewerkschaft des Privatangestellten - GPA	White-collars private sector	5.600	12.3%	Yes	ÖGB	EFFAT, ETUC
Gewerkschaft Öffentlicher Dienst – GÖD	Employees of federal state White collars and civil servants	550⁺⁺	1.2% (90%) ⁺⁺⁺	Yes	ÖGB	EFFAT, ETUC

⁺ members of both agriculture and food processing, no sector-specific membership data are available for the GANG

⁺⁺ this figure relates to only it sector. Total affiliation to GÖD: 233.898

⁺⁺⁺ () Density in the sub-sector, estimated by the national expert

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

4.2 Belgium

Contextual data

From a collective bargaining viewpoint, agricultural sector refers to activities gathered under the NACE classification 01: agriculture, hunting and related service activities. The forest activities are covered by the Joint Committee146. It was not taken into account in the realisation of the note safe on the level of the social elections.

The total number of persons working on farms, full and part time, is 112.402 (INS 1998), which is corresponding to 75.009 full time job equivalents. If we consider only employed persons, the total amount of permanently employed persons: is 8.998. Non permanently employed persons are 5.216 (INS1998).

Certain permanents of trade union also insisted on the fact that a significant volume of seasonal work characterises the sector.

Companies	Of which % <10 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
6.278	89 %	30.081 (1)	14.278	3.839	100 %

(1) Data ONSS for agriculture only (NACE 01)

Collective bargaining takes places within three joint committees: one for companies of technical agricultural and horticultural work (Joint Committee 132), an other for agriculture (JC 144) and a third for horticultural companies (JC 145). There are two significant employers' organisations: the *Boerenbond* is a important institution in Flanders and, more largely, in Belgium. This organisation represents however only the agricultural world with the National Council of Labour like during collective bargaining. The other is the Fédération Wallonne de l'Agriculture (FWA). The FWA is born into 2000 following the fusion between *Alliance Agricole Belge* (AAB) and the *Union Professionnelle Agricole* (UPA).

These agricultural organisations constitute one of the three components of associations representative of private employers. The two others are the *Fédération des Entreprises Belges* (Federation of the Belgian Companies - FEB) and associations of defence of the middle class.

There exists, beside the two great employers' federations, several smaller and strongly localised professional structures of which *Algemeen Boeren Syndicat* (ABS), in Occidental Flanders. On the level of the horticulture, the employers' representation is much burst than in the case of the Joint Committee of agriculture. In addition to Boerenbond, which occupies 2 mandates, the horticulturists are represented by three other organisations.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Boerenbond	All	17.000 farmers ³⁷	NA	NA	Yes	-	GEOPA-COPA
Fédération Wallonne de l'Agriculture – FWA (AAB – UPA)	Agriculture	11.000 farmers	NA	NA	Yes	-	GEOPA-COPA
Algemeen Boeren Syndicat – ABS	Local agriculture	NA	NA	NA	No	-	-
Association Royale Chambre Syndicale de l'Horticulture – Koninklijke Syndicale Kamer van de Belgische Tuinbouw	Horticulture	200 members	NA	NA	Yes	ABS	-
Fédération des Horticulteurs et Pépiniéristes Belges - Algemeen Verbond van de Belgische Sierteelers en Groenvorrtziereners	Horticulture, nursery gardens	1.800	NA	NA	Yes	Boerenbond	GEOPA-COPA, ENA
Centrale Nationale Agro-service - Nationale Centrale Landbouw-service	Technical work agricultural and horticultural	300	NA	NA	Yes	Unizo	CEETAR

The Association Royale Chambre Syndicale de l'Horticulture is become recently the Vlaams Tuinbouw Unie.

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation - indirect
Centrale Chrétienne de l'Alimentation et des Services – CCAS	Christians	6.477	21%	Yes	CSC – ACV	EFFAT ETUC
Secteurs Verts FGTB	Socialists	2.400	7.9%	Yes	FGTB - ABVV	EFFAT ETUC
CGSLB	Liberals	438	1.5%	Yes	CGSLB - ACLVB	CESI

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert Bold Italic = data from the European organisation Italic = our estimates

³⁷ Figure communicated by GEOPA-COPA : 35.000 farmers

4.3 Denmark

Contextual data¹

Used figures are adjusted in such way only activities under NACE 01 are included except for contextual data which concerns also forestry and fish farming.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
46.398	60.61 %	97.96 %	0.03 %	101.605 *	80.244	1.561	Est 50 %

* Last updated: 84.343 (January 1st 2000)

During the high season, especially in gardening, the employers are hiring migrant workers from Eastern Europe, mostly from Poland. (Polish migration workers in gardening have a long tradition in the Southern parts of Denmark).

The employers claim, that in the high season there is not enough Danish work force available, and that they in many cases cannot get enough workers from EU countries. So they hire people from elsewhere, i.e. Poland, Lithuania, Estonia and Latvia in far most cases. The employees' organisation *S/D GLS gruppen* on their side claim, that the enterprises/employers prefer the cheap work force from the East in the first place. Generally, migrant workers, as they are not covered by collective agreements, they receive less wage. In addition, it is not easy to say how many are working in the Danish gardenings and farms during high seasons, as they don't pay tax either.

¹ The numbers include landscape gardeners. The Danish Association of Landscape Gardeners has about 1000 members.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density**	CB	National affiliation	European affiliation - indirect
Gartnerbrugets Arbejdsgiverforening	Nursery gardens, market gardens	530	8.000	60-70%**	Yes	SALA	GEOPA-COPA CEDEFOP
Land- og Skovbrugets Arbejdsgivere	Agriculture, farming	100	12.000	25-50%**	Yes	SALA	GEOPA-COPA CEDEFOP
Kristelig Arbejdsgiverforening	Farms, nursery gardens, machine pools	103	600	NA	Yes	Håndværkerrådet	UEAMPE

** Density rate is the number of members divided by the potential members in respective subsector/occupations, estimated by the national expert

Collective bargaining in agricultural sector takes place in the LO/SALA area, LO being the employee's main organisation (The Danish Confederation of Trade Unions), and SALA the main organisation on the employers' side (the Danish Association of Employers' Associations in Agriculture - Sammenslutningen af Landbrugets Arbejdsgiverforeninger.). LO and SALA are, as mentioned, main organisations and do not themselves participate in the bargaining.

Inside the sector referring to activities under NACE 01 classification, collective bargaining takes place between the employee's organisation *Sid GLS gruppen* and two employers' organisations: *Land- og Skovbrugets and Gartnerbrugets Arbejdsgiverforening*. The result is several collective agreements (at least three), divided by negotiation issue.

We have to mention that *Kristelig Fagforening* (Christian Workers' Union) has an agreement in the sector of agriculture with *Kristelig Arbejdsgiverforening*. (Christian Employers' Union). Both are so-called independent (alternative) organisations. They are not member of LO nor SALA. They are by the majority of the labour market organisations not regarded as a "legal" player. Anyway, their influence is weak.

We also point out that there exists an industry association, the Danish Council of agriculture, even if they do not negotiate collective agreements. The department co-ordinates and establishes the agriculture's position in relation to the agricultural and commercial policy of the EU, WTO included. The department is the secretariat for the agriculture's activities in international organisations (IFAP, CEA, GEOPACOPA and NBC).

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation - indirect
Sid GLS gruppen	Gardeners, farm workers	14.000 ³⁸	13.78%	Yes	LO	EFFAT, ETUC, CISL
Kristelig fagforening	Gardeners, farm workers	270	0.27%	Yes	-	-

Land- og Skovbrugets Arbejdsgivere also has agreements with the employees organisations SID on forestry and fish farming. However, as mentioned in earlier, the figures used only refers to activities under NACE 01.

^{*}Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector. Density could be underestimated because of the use of figure of employees for the entire sector whereas figure for NACE 01 would be better.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

³⁸ Figure communicated by EFFAT : 25.000 members

4.4 Finland

Contextual data

From a collective bargaining viewpoint, agriculture sector refers to activities gathered under the NACE classification, which covers in Finland both agriculture production, gardening, green construction, fur-bearing farming, farmland travelling and forestry (NACE 01 and 02). Forestry industry workers as well as fishing industry workers have their own agreements negotiated with the employers' organisations.

According to NACE statistics in the agriculture sector, there were in 1997 107 983 people and in 1999 91 871 people in this sector.

According to the pension statistics in year 1990 the total amount of employees working in the agriculture sector was 93 000 and in 1999 54 000 employees. Full time workers in the agriculture sector in 1990 was 27 000 and in 1999, 19 500.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
6.500	80 %	90 %	1 %	54.000	58 %	85 %	1 %	70 %

There is only one employers' organisation and one trade union organisation, which negotiates five collective agreements for agriculture sector. Employers' organisation Maaseudun Työnantajaliitto, the Federation of Agricultural Employers, represents 1024 (year 2000) private agriculture companies and negotiates collective agreement for 9000 employees, which belongs mainly to Puu- ja Erikoisalojen Liitto. Collective agreements are generally binding, which means that they cover all people working in the sector: agricultural farming (general binding agreement covers 5000 employees), gardening (3000), fur-bearing farming (2300). Green houses and golfing sector agreement is not generally binding but it covers about 3000 employees.

Management organisations negotiating collective agreements

<i>Employers</i>	<i>Type of companies covered</i>	<i>Companies</i>	<i>Employees³⁹</i>	<i>Density*</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirect</i>
Maaseudun Työnantajaliitto, Federation of Agricultural Employers - MTL	Private agriculture production, gardening, green construction, fur-bearing farming, farmland travelling and forestry	1.024	9.000⁴⁰ (+20,000 seasonal workers)	<i>16,7%</i> <i>(54%)</i>	Yes	TT	GEOP A-COPA, UNICE

Labour organisations negotiating collective agreements

<i>Employees</i>	<i>Types of employees recovered</i>	<i>Members</i>	<i>Density*</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirect</i>
Puu- ja Eriyisalojen Liitto – PUU-Ja	blue collars	9000⁴¹	<i>16,7%</i>	Yes	SAK	EFFAT, ETUC, EFBWW

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

³⁹ This figure includes only dependent workers

⁴⁰ According to MTL via Geopa-Copa, we have to add 20.000 seasonal workers to these 9000 employees.

⁴¹ Figure communicated by EFFAT : 51.000 members

4.5 France

Contextual data

From a collective bargaining viewpoint, agricultural sector refers to activities gathered under the NAF classification 01: agriculture, hunting and related service activities.

Concerning forestry and fishing, it should be noted CB in agriculture concern some parts of these sectors. For the sector of fish breeding, one makes the distinction between the activity being carried on in fresh water or seawater. The fresh water breeding thus concerns conventions of the agricultural sector. More subtle nuances still are brought for activities such as molluscs breeding. The distinction is made in this field according to the permanent cover or not of the breeding by seawater. The non-covered breeding in a permanent way concern the sector of agriculture.

Concerning forestry, one distinguishes two categories: forest owners and forest nursery gardeners. The forestry companies (of cut of wood) do not concern the sector of agriculture. That represents some 30.000 workers and 5000 companies. However there is an abstract agreement between this category of workers and the FNSEA in order to be represented at the European level via GEOPA-COPA.⁴²

Companies	Of which % without employees	Employees	Coverage
750.000	82 %	800.000	100 %

⁴² Interview Mr Brum (GEOPA-COPA), 20/09/2001

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density +	CB	National affiliation	European affiliation – indirect
Fédération Nationale des syndicats d'Exploitants Agricoles – FNSEA / Centre National des Jeunes Agriculteurs – CNJA	Agriculture (growing, farming)	135.000	NA	53.82%	Yes	FNSEA	GEOPA-COPA, CEA
Confédération Paysanne	Agriculture	91 structures	NA	26.34%	No	-	CPE
Coordination Paysanne	Agriculture	NA	NA	12.18%	Yes*	-	CPE
MODEF	Agriculture	NA	NA	2.93%	Yes*	-	CPE
Union MODEF – Confédération paysanne	Agriculture	NA	NA	1.44%	No	-	-
Fédération Française de l'Aquaculture	Aquaculture	NA	NA	-	Yes	-	FEAP
Confédération française de l'Aviculture – CFA	Poultry industry	NA	NA	-	Yes	FNSEA	-
Syndicat national des accouveurs – SNA	Poultry industry	NA	NA	-	Yes	-	-
Syndicat National des employeurs de Gardes Particuliers de chasse et pêche - SNGP	Forest – fishing warden employers	NA	NA	-	Yes	-	-

+ Résultats of the “chambres d'agriculture” elections * Only in some département and not at the national level.

The collective bargaining in agriculture proceeds on two plans:

- ☐ departmental or regional collective agreements
- ☐ national agreements

The collective agreements were negotiated as from 1950 on a departmental level. They were in fact the continuation of the prefectoral decrees which had been maintained for agriculture by the law of February 11, 1950. In certain “départements”, the FDSEA negotiates a single collective agreement for all agricultural activities. In other “départements” coexist several collective agreements. The generalisation of the conventional cover was completed in the Seventies, especially by the conclusion of some collective agreements “pluri-départemental” or regional. Certain collective agreements were amalgamated in a convention “pluri-départemental” or regional. One counts 154 collective agreements departmental and 65 conventions “pluri-départemental” or regional.

Federations of employers representing the related agricultural activities (agricultural work, landscape designers, foresters) joined these agreements which are negotiated in Joint Committee. National agreements of method (“de méthodes”) are also negotiated to guide the decentralised negotiation (classification of employment, guarantee of wages in the event of disease). Under these conditions, the decentralised negotiation of the collective agreements is primarily circumscribed with the negotiation of the wages, premiums, compensations various.

There are two national collective agreements: artificial incubation and aquaculture. The agricultural collective agreements are negotiated in Joint Committee. These commissions are convened and chaired by the factory inspectorate in agriculture. Most of the collective agreements are extended by decree of the Minister for Agriculture and are revised once per year. To encourage the organisation trade-union of employee to designate some employee in activity to them represent in the mixed Joint Committee, the FNSEA have sign in 1992 a agreement national with the CFDT, the CGT, FO, the CFTC and the CGC. It is an national agreement for the financing of collective bargaining collective in agriculture.

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density⁺	CB	National affiliation	European affiliation – indirect
Fédération Nationale Agroalimentaire et Forestière – FNAF / CGT	All	1700 bases organisées	39%	Yes	CGT	EFFAT
Fédération Générale de l'Agroalimentaire – FGA / CFDT	skilled workers of exploitation, foremen, heads of culture, managers of exploitations.	2500 – 3000	25.7%	Yes	CFDT	EFFAT, ETUC
Fédération des Syndicats Chrétiens des Organismes et Professions de l'Agriculture / CFTC	Dependent workers of agricultural organisations and agricultural production	1800	4.4%	Yes	CFTC	FEMTA, EFFAT
Syndicat National des Cadres des Entreprises Agricoles – SNCEA - Confédération Générale des Cadres – CGC	White collars	NA	12%	Yes	CFC-CCG	CEC
Fédération Générale des syndicats de Salariés et des Organisations professionnelles de l'Agriculture et de l'industrie agroalimentaire – FGSOA	All	12.000	4.2%	Yes ⁺⁺	UNSA	ETUC
Fédération Générale des Travailleurs de l'alimentation et services – FGTA-FO	Blue collars	6150*	9.6%	Yes	FO	EFFAT, ETUC
Syndicat des Travailleurs de la Confédération Paysanne et Organisations Affiliées – STCPOA	All	NA	-	Yes	-	-

+ Results from elections of the *Chambres d'agriculture* * *Probably overestimated*

++ do not participate to CB for agricultural production in some “départements”. The FGSOA is contested by the confederation CFDT – CGT – FO – CFTC – CGC in these “départements”. In addition its membership claim is probably overestimated.

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert. Bold Italic = data from the European organisation Italic = our estimates

4.6 Germany

Contextual data

From a collective bargaining viewpoint, the agricultural sector refers to activities gathered under the NACE classification 01, 02 and 05. These activities encompass farming, animal rising, forestry, gardening and garden construction, fishing and other related services.

Companies⁴³	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees⁴⁴	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
434.000	>90 %	95 %	0.4 %	196.000 (496.000⁴⁵)	35 - 40 %	5 %	1 %	NA

According to *Deutscher Bauerverband* in year 2001, the total amount of people working in the farming sector is 1.437.000. Concerning permanently employed people, full time workers in the agriculture sector are 151.000 and part-time employees 45.000. It is estimated that seasonal employment involves about 300.000 workers in a year.

We have no exact information about the economic structure in the garden construction sector, but rough estimations indicate that small sized firms with less than 10 employees dominate. The *Bundesverband Garten-, Landschaft- und Sportplatzbau e.V.* gave the information that there are around 11.000 firms operation in the sector, which employ approx. 100.000 workers, i.e. the average firms employs less than 10 people. One may guess that enterprises with more than 100 employees are very rare.

The whole sector of agriculture is very fragmented on the employers side concerning collective bargaining. All of the associations mentioned in table below are direct or indirect members of the *Gesamverband der Deutschen Land- und Forstwirtschaftlichen Arbeitgeberverbände*, the German agriculture-employers' peak organisation. Itself is not involved in collective bargaining.

⁴³ figures are for farms with more than 2 hectares

⁴⁴ figures are for farms and not for garden construction sector

⁴⁵ if seasonal workers are included

On the whole, the amount of employees for the entire sector is about 600.000 employees. We will use this figure for calculating the density.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Gesamtverband der Deutschen Land- und Forstwirtschaftlichen Arbeitgeberverbände	NA	NA	NA	NA	Yes*	BDA	GEOPA-COPA, UNICE

* Gesamtverband negotiate collective agreements via its affiliated regional members.

The affiliated regional members of the *Gesamtverband* are:

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Land- und Forstwirtschaftlicher Arbeitgeberverband Thüringen e.V	Regional companies	213	6.254	1%	Yes	BDA	UNICE
Land- und Forstwirtschaftlicher Arbeitgeberverband für Hessen e.V	Regional companies	380	650	0.1%	Yes	BDA	UNICE
Arbeitgeberverband der Land- und Forstwirtschaft in Schleswig-Holstein e.V.	Regional companies	1.900	3.000	0.5%	Yes	BDA	UNICE
Land- und Forstwirtschaftliche Arbeitgebervereinigung Niedersachsen e.V	Regional companies	1.600	2.700	0.45%	Yes	BDA	UNICE
Arbeitgeberverband für die Land- und Forstwirtschaft in Bayern e.V.	Regional companies	2.621	4.199	0.7%	Yes	BDA	UNICE
Land- und Forstwirtschaftliche Arbeitgebervereinigung des Rheinischen Landwirtschaftsverbandes e.V.	Regional companies	NA	1500	0.25%	Yes	BDA	UNICE
Arbeitgeberverband der Westfälisch-Lippischen Land- und Forstwirtschaft e.V.	Regional companies	1.900	2.500	0.4%	Yes	BDA	UNICE
Landwirtschaftlicher Arbeitgeberverband für Südbaden	Regional companies	218	435	0.07%	Yes	BDA	UNICE

Beside the regional organisations, there are two additional employers' association members of the Gesamtverband:

The ***Arbeitsgemeinschaft der Arbeitgebervereinigungen im ländlichen Genossenschaftswesen***, which represents cooperatives in the agricultural and food-processing industries. Some organisations are affiliated to this association but only a few of them are involved in collective bargaining:

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Genossenschaftlicher Arbeitgeberverband Württemberg e.V.		NA	4.900	0,7%	Yes	BDA	UNICE
Genossenschaftlicher Arbeitgeberverband e.V		105	6.000	1%	Yes	BDA	UNICE

The second one is the ***Arbeitsgemeinschaft der gärtnerischen Arbeitgeberverbände*** which represents firms in gardening or garden construction. Like the *Arbeitsgemeinschaft der Arbeitgebervereinigungen im ländlichen Genossenschaftswesen*, the *Arbeitsgemeinschaft der gärtnerischen Arbeitgeberverbände* itself represents some other employers associations.

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Fachverband Deutscher Floristen e.V. – FDF	Florists	6.500	32.500	5,4%	Yes	BDA	UNICE
Bundesverband Garten-, Landschafts- und Sportplatzbau e.V – BGL		3.000	65.000	10,8%	Yes	BDA	ELCA, UNICE
Bund deutscher Baumschulen		NA	NA	NA	NA	BDA	UNICE

Reported figures must be handled with some caution and should be interpreted as estimations. Sectoral lines between agriculture, food-processing and construction are sometimes blurred. This holds especially true for the gardening/garden construction/flower sector, as reported by the “Arbeitsgemeinschaft der gärtnerischen Arbeitgeberverbände.”

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation - indirect
IG Bauen-Agrar-Umwelt	Blue collars, white collars, civil servants	+/-56.511 (1998)	9.5%	Yes	DGB	EFFAT, ETUC

Besides *IG Bauen-Agrar-Umwelt* unions there are some other employees associations. But these were mentioned only by one or two regional employers' association as bargaining partners; they provided no information on their respective membership. One can assume that they are of negligible importance in the context of German collective bargaining. These associations are: *Deutscher Land- und Forstwirtschaftlicher Angestelltenbund*, *Bund Deutscher Forstleute*, *Arbeitsnehmerverband land- und ernährungswirtschaftlicher Berufe*, *Arbeitsnehmerverband Deutscher Milchkontroll- und Tierzuchtbediensteter*.

Due to sometimes blurred sectorial demarcations, a few regional employers' associations also mentioned the *Gewerkschaft Nahrung-Genuss-Gaststätten* (NGG), which is affiliated to the DGB, to be a bargaining partner. But it seems that these associations are not only concerned with agriculture but also with the food processing industry; agriculture is the domain of *IG Bauen-Agrar-Umwelt*.

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

4.7 Greece

Contextual data

Overall, employment in the rural sector (agriculture, viticulture, hunting, forestry and fishing) amounts to 670.000 individuals, i.e. 17% of those in employment (2000 figures). In effect, however, the real number of the rural workforce is hard to define, due to the massive influx of illegal immigrants on one hand, and the high proportion of pluri-activity, but also unpaid family members and self-employed, on the other. It is estimated that migrant workers account for over 45% of paid labour in agriculture. Part-time work is also more widespread than in other sectors of the economy: 15% of women and 6% of men employed in agriculture are working part-time (1997 data).

Companies	Employees	Employees (% full employment)	Coverage
870.000 farmers	25.199 (1)	3.8%	90%

(1) Dependent workers

Concerning collective bargaining in the sector, PASEGES, the tertiary-level professional organisation of the agricultural cooperatives, negotiates the content of the only one collective agreement with the Federation of Employees working in the Agricultural Organisations (OSEGO), which is binding for the whole sector. They concluded it in July 2000 for 2 years. It covers wage issues, subsidies, leaves, establishment of joint committee to presents proposal for the improving of the sector.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees⁴⁶	Density*	CB	National affiliation	European affiliation – indirect
Panhellenic Confederation of Unions of agricultural cooperatives - PASEGES	Agricultural cooperatives	7.000 co- operatives	800.000	Est 75 %	Yes	-	GEOPAA-COPA, CEA
General Confederation of Agricultural Association of Greece – GFSASE	Farmers and rural workers	49 organisations	300.000	60 %	No	-	GEOPAA-COPA, SEIA, EESC

⁴⁶ This figure includes employees, self-employed professionals, firm owners and working family members. According to the national expert, the number of farmers represented by PASEGES, the figure of 800.000, is surely exaggerated and needs to be watered down.

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation – indirect
Omospondia Syndikaton Ergazomenon Georgikon Organosseon (Union Federation of Agricultural Organisations' Employees) – OSECO	All**	9.629 (year 2001)	8.8%	Yes	GSEE	EFFAT, ETUC

**All employees working in the agricultural co-operatives organisations affiliated to PASEGES

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

4.8 Ireland

Contextual data

Companies	Of which % without employees	Employees	Employees (% full employment)	Coverage
143.900	83%	123.800	46%	-

Data year 2000.

The total number of persons working on farms, full and part time, is 270.000, which is corresponding to 191.700 full time job equivalent.

The number of self-employed persons in the agriculture sector is quite high in Ireland, with the majority of farmers being classified as self-employed persons. According to the ESRI (Economic and Social Research Institute), the number of self-employed persons working in the agriculture sector is approximately 120.000. Farmers make up over 40% of the total figure for self-employed people in Ireland.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Irish Farmers Association – IFA	Farms	8000	85.000	68%	Yes**	IBEC	GEOPA-COPA, UNICE
Irish Creamery Milk Suppliers Association – ICMSA	Milk suppliers	NA	30.000	24%	Yes**	-	-
Irish Co-operative Organisation Society Limited – ICOS	Co-operative societies	30 to 40	3000	2%	Yes**	-	-
Macra na Feirme		NA	8000	6%	No	-	-

Farming organisations have been party to negotiations of national partnership agreements since the return to centralised national level bargaining in 1987. Since 1990 the farming ‘pillar’ of the social partnership process has been comprised of four organisations: the Irish Farming Association (IFA), the Irish Creamery and Milk Suppliers Association (ICMSA), Macra na Feirme, and the Irish Co-operative Society (ICOS).

The Irish Business and Employers Confederation (IBEC) is the primary management/ employer organisation in Ireland. IBEC does not, however, does not have any direct members in the agriculture sector. There are a large number of agricultural associations in Ireland, and as mentioned above, four of these organisations form the farming pillar of social partnership in Ireland. Although these organisations do not partake in collective bargaining** (collective bargaining take place at company level in Ireland), they are represent members of the agriculture industry in Ireland, and exert a strong influence over government, the Department of

Agriculture, Food and Rural Development, and the social partners, with regard to agricultural matters. Consequently, it is worthwhile to outline the membership levels and roles of these associations.

In terms of farm labourers and non-unionised agricultural 'employees' there exists a Joint Labour Committee (JLC). JLCs are bodies established under the Industrial Relations Act, 1946 to provide machinery for fixing statutory minimum rates of pay and conditions of employment. A JLC is made up of equal numbers of employer and worker representative appointed by the Labour Court and a chairman and substitute chairman appointed by the Minister for Enterprise, Trade and Employment. They operate in areas where collective bargaining is not well established and wages tend to be low.

The current national agreement, the Programme for Prosperity and Fairness (PPF), sets out a number of measures aimed at developing the agricultural sector in Ireland.

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation - indirect
Services Industrial Professional Technical Union – SIPTU	Agricultural sector	7,000	5.6%	Yes**	ICTU	EFFAT, ETUC, ECF, EMCEF, EMF
The Veterinary Officers Association	Veterinary	315	0.2%	Yes**	ICTU	ETUC
Irish Veterinary Union	Veterinary	665	0.5%	Yes**	ICTU	EFFAT, ETUC

** See text and table

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

4.9 Italy

Contextual data

The agricultural sector continues to face with an intense process of restructuring. During the period 1995-2000 total employment had a decrease of about 16%. Together with this process of employment reduction, there is a notable trend toward the reorganisation of agriculture with an increase in the use of machinery. Furthermore, there has been a recent growth of biological productions and of the mix of tourist and agricultural activities (the so-called *Agriturismo*). As for the organizational structure, the majority of firms are of small scale.

Companies	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
1.043.000*	80%***	0.9%***	451.000	40%	48%***	18%***	NA

* Source: Unioncamere - Data refer to 20001

** Source Istat 2001: data refer to 2000

*** Estimation

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees ⁴⁷	Density*	CB	National affiliation	European affiliation – indirect
COLDIRETTI (Confederazione Nazionale Coltivatori Diretti)	All	568.000	1.200.000	NA	Yes	Coldiretti	GEOPA-COPA, COFACE AEIAR, AEPV, CEFAR
CONAGRICOLTURA (Confederazione Generale dell'Agricoltura Italiana)	All	685.000	1.491.000 (181.000) ⁴⁸	NA	Yes	Confagricoltura	GEOPA-COPA, FIPA, CEA
CIA (Confederazione Italiana Agricoltori)	All	880.023	1.473.784	NA	Yes	CIA	GEOPA-COPA

⁴⁷ This figure includes employees, self-employed professionals, firm owners and working family members.

⁴⁸ Figure for dependent workers communicated by EFFAT

The agriculture's sector is characterised by a high number of employers' organisations. Nevertheless, it is possible to identify a small number of major organisations which play the leading role in the industrial relations' arena, and which sign the most important collective agreements. Some of these general organisations - such as Confagricoltura - gather together some sub-sectoral organisations, which often participate directly to the process of collective bargaining⁴⁹.

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density	CB	National affiliation	European affiliation – indirect
Federazione Nazionale Lavoratori dell'Agroindustria - FLAI-CGIL	Sectoral workers	302,510*	2.7%	Yes	CGIL	EFFAT, ETUC
Federazione Italiana Salarjati, Braccianti e Tecnici Agricoli – FISBA-CISL	Sectoral workers	179,311*** (300,000)**	1.6%	Yes	CISL	EFFAT, ETUC
Unione Generale Colttivatori - UGC-CISL	Sectoral workers	67,752*** (50,500)**	6%	Yes	CISL	EFFAT, ETUC
Unione Italiana Lavoratori Agroalimentari - UILA-UIL	Sectoral workers	142,192****	12.7%	Yes	UIL	EFFAT, ETUC
Unione Italiana Mezzadri e Colttivatori Diretti - UIMEC-UIL	Sectoral workers	41,869**** (105,000)**	3.7%	Yes	UIL	EFFAT, ETUC
Confederazione Italiana Dirigenti, Quadri e Impiegati dell'Agricoltura – CONFEDERDIA	Professional and managerial staff	NA	NA	Yes	Confederdia	-
Associazione Nazionale Dirigenti Aziende Agricole – ANDAA	Managers	1,500*****	0.13%	Yes	CIDA	CEC

* Data provided by CGIL

** data provided by European association EFFAT.

*** Data provided by CISL

**** Data provided by UIL

***** estimation based on Cesos database

Some figures are certainly overestimated or figures are for employment. Therefore, density is estimated on total employment (1.120.000 people).

⁴⁹ Confagricoltura has actually four major sub-sectoral organisations.

The representation of workers' interests in Italy is mainly horizontal and not sectoral: sectoral federations are actually internal structures of general trade unions. Similarly, autonomous trade unions, even if they were initially professional trade unions, adopt a federal structure gathering together various professional or sectoral associations. Consequently, even if sectoral federations usually have autonomy in collective bipartite negotiation, they usually must behave according to interfederal strategies, especially in the field of social and lr policies. With regard to the territorial level, provincial intersectoral associations have a leading role at the local level in the Italian I.R. system. They are fully autonomous, both in legal and administrative terms.

The agriculture's sector is characterised by a low degree of fragmentation. However, some general trade unions, such as Cisl or Uil, have more than one sectoral organisation which play an important role in this sector. This feature characterises also CONFEDERDIA, an organisation which mainly represents professional and managerial staff, which gather together four sub-sectoral organisations⁵⁰. In this sector, there are not small autonomous trade unions which sign major industry-wide agreements. Nevertheless some of them have a relevant role in organising intense strikes and conflicts. It should be noted that these small autonomous unions are characterised by a low level of institutionalisation and they often represents specific interests (for example interests of specific territories).

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

⁵⁰ Confederdia gathers together Dir-Agri, Agri-Quadri and Federdia

4.10 Luxembourg

Contextual data

The total number of working persons in agricultural sector is 10,646, that is corresponding to 4449 full time job equivalent. Among these persons, 664 are to be considered like full time employees. For part time employees, it is the equivalent of 78 full time job

Companies	Employees ⁵¹	Employees (% full employment)	Coverage
2.813	742	7%	-

There is not any collective agreement in the agricultural sector itself. One raises however the existence of 6 collective agreements in the agro-alimentary sector. The purely agricultural management organisations (*Centrale Paysanne*, FLB and *Bauern-Allianz*) do not take part indeed in collective bargaining. These trade unions miss also collective agreements of the agro-alimentary sector where one finds traditional trade unions OGB-L (*Confédération syndicale indépendante – Luxembourg*) and LCGB (*Confédération des Syndicats Chrétiens du Luxembourg*).

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees ⁵²	Density ⁵³	CB	National affiliation	European affiliation - <i>indirect</i>
Centrale Paysanne	Agriculture	NA	3.633	34%	No	-	GEOPA-COPA
Fräie Letzebuerger Bauerverban – FLB	All	530	1.200	11.2%	No	-	CPE
Bauern Allianz	Agriculture	NA	NA	NA	No	-	-

⁵¹ This figure includes only dependent workers: 664 full time workers and 78 full time equivalent job for non permanent workers

⁵² This figure includes employees, self-employed professionals, firm owners and working family members

⁵³ These densities are calculated on employees, self-employed professionals, firm owners and working family members

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation
OGB-L	Blue collars, white collars	286**	38%	Yes	CGT-L	EFFAT, ETUC
LCGB	All	NA	NA	Yes	LCGB	ETUC

**for the agro-alimentary sector. Otherwise, the OGB-L counts on the whole 3500 members.

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

4.1.1 Netherlands

Contextual data

From a statistical viewpoint, the following activities are classified as part of the agricultural sector: agriculture, hunting, and related services (NACE 01). Figures about forestry sector are not included.

In 1999 there were 101,500 companies in the agricultural sector, of which 88,000 derived their income primarily from agricultural activities. The number of companies without employees differs for each sector. In 1999, approximately 270,000 people were working in the agricultural sector (LTO Nederland, interview). This figure includes employees, self-employed professionals, firm owners and working family members. Dependent workers are about 120,000 people.

Companies	Employees	Employees (% full employment)	Coverage
101.500	120.000 (year 1999)	44%	82%

LTO Nederland is the main employers' association in agriculture. This organisation represents all agricultural firms in the national social partner organisations, like the Foundation of Labour and the Social-Economic Council, but also negotiates and concludes collective agreements on behalf of its members.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Land- en Tuinbouworganisatie - LTO Nederland	Agriculture, horticulture, arboriculture	74.000	30.000 ⁵⁴	25%	Yes	LTO Nederland	GEOPA-COPA

⁵⁴ Not registered for the organisation as a whole but more than 60 percent of employees in agriculture (exact figure unknown) and horticulture. Source: FNV overview of direct coverage and coverage after general extension of collective agreements. Based upon 1998 figures.

Regional organisations of LTO:

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Noordelijke Land- en Tuinbouworganisatie – NLTO	Regional companies	15.000**	NA	NA	No	LTO Nederland	GEOPA-COPA
Gewestelijke Land- en Tuinbouworganisatie – GLTO	Regional companies	20.000**	NA	NA	No	LTO Nederland	GEOPA-COPA
Westelijke Land- en Tuinbouworganisatie – WLTO	Regional companies (flowerbulbs)	12.000**	5.750 ⁵⁵	4,8%	Yes	LTO Nederland	GEOPA-COPA
Zuidelijke Land- en Tuinbouworganisatie – ZLTO	Regional companies	22.000**	NA	NA	No	LTO Nederland	GEOPA-COPA
Limburgse Land- en Tuinbouworganisatie – LLTB	Regional companies	5.000**	NA	NA	No	LTO Nederland	GEOPA-COPA

** These companies are part of the 74.000 members of LTO Nederland.

In a number of sectors other employers' associations negotiate. Formally, these organisations are not affiliated to LTO Nederland but there exists close cooperation and their member companies may be affiliated to the regional organisations of LTO Nederland as well and this way be represented at the national level.

Employers	Type of companies covered	Companies	Employees⁵⁶	Density*	CB	National affiliation	European affiliation – indirect
Nederlandse Bond voor Boonkwekers -NBVB	Arbiculture	1.850	NA	NA	Yes	-	GEOPA-COPA
Coöperatieve Nederlandse Champignonkwekers-vereniging – CNC	Mushrooms	450	4.300 ⁵⁷	3,5%	Yes	-	GEOPA-COPA
Nederlandse Veeverbeteringsorganisatie – NVO	Cattle improvement	20	3.300 ⁵⁸	2,75%	Yes	-	GEOPA-COPA
Plantum NL	Gardening seeds	500	2.400 ⁵⁹	2%	Yes	VNO-NCW	ESA (European Seed Association), UNICE

⁵⁵ Source: FNV overview of direct coverage and coverage after general extension of collective agreements. Based upon 1999 figures.

⁵⁶ Many organisations in agriculture do not register the number of employees of their member companies.

⁵⁷ Based upon FNV overview of direct coverage and coverage after general extension of collective agreements. Figures based upon 1999 situation.

⁵⁸ Not registered by the organisation (NVO interview) but estimates of 3.300 (Source: FNV overview of direct coverage and coverage after general extension of collective agreements. Figures based upon 1999 situation)

⁵⁹ Number of members of the predecessor of Plantum NL, i.e. Nederlandse Vereniging voor Zaaizaad en Plantgoed in 1998 (in gardening seeds).

Vereniging Hoveniers en groenvoorzieners – VHG	Gardening	1.155	11.767⁶⁰	9.8%	Yes	VNO-NCW, MKB Nederland	ELCA, UNICE, UEAPME
Cultuurtechnischewerken en grondverzet, meststoffen-distributie en loonwerken in de agrarische sector – CUMELA	Agricultural equipment exploiting firms	1.574	13.457⁶¹	11.5%	Yes	MKB Nederland	CEETA, UEAPME
Landelijk Contactorgaan Bedrijfsverzorgingsdiensten – LCB⁶²	Company management services	17	11.404⁶³	9.5%	Yes	AWVN	GEOPA-COPA

Last year, a number of employers' associations, like CNC (mushrooms), NBVB (arboriculture) and NVO (cattle improvement) agreed to cooperate more closely with LTO Nederland.

For sectoral agreements, the Ministry of Social Affairs and Employment considers all associations listed beside sufficiently representative. All these employers' associations and labour unions signatory to the agreement have, in fact, been able to prove to the Ministry of Social Affairs and Employment that at least 55-60 percent of all employees in that specific sector are employed by members of the employers' association that signs the agreement.

⁶⁰ Source: internet; Annual Report 1999

⁶¹ Source: Cumula Nederland, interview. Figures based upon situation 01/2001.

⁶² The five regional member organisations organise the companies and sign the collective agreements. These organisations are: Bedrijfsverzorging Noord- en West-Nederland, Bedrijfsverzorging Oost-Nederland, Bedrijfsverzorging Limburg, Bedrijfsverzorging in Noord-Brabant en aangrenzende gebieden, Bedrijfs- en Agrihulp in Zeeland.

⁶³ LCB, interview. There are 11,404 employees on the payroll, but most are short-term contracts and part-time jobs. Full-time employment in the sector is 5522.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density*	CB	National affiliation	European affiliation - indirect
FNV Bondgenoten	All	17.000	14.2%	Yes	FNV	EFFAT, ETUC
CNV Bedrijvenbond	Christians	6.800	5.7%	Yes	CNV	EFFAT, ETUC
De Unie	White collars	219	0.1%	Yes**	UOV, Unie MHP	ETUC
VHP BVVN	Senior executives***	NA	NA	Yes**	UOV, Unie MHP	ETUC

** These two labour unions are active in the agricultural sector, but their membership in this sector is limited as each of them is only party to one collective agreement. De Unie (a member of the national white-collar confederation Unie MHP) is only party to the 'gardening seeds' agreement, and VHP is only party to the 'cattle improvement' collective agreement. In comparison with FNV Bondgenoten and CNV bedrijvenbond, their role in industrial relations in the agricultural sector is marginal.

***in one subsector

FNV Bondgenoten and CNV Bedrijvenbond negotiate all collective agreements on behalf of the employees in the sector. Although, with approximately 20 percent, density in the agricultural sector is relatively low compared to the national average of 28 percent. Nevertheless, FNV Bondgenoten and CNV Bedrijvenbond are recognised by the employers' associations to be sufficiently representative to conclude all collective agreements for the sector. The unions are also members of the board of the education and training fund for the agricultural sector.

Currently, collective bargaining in the agricultural sector is in a process of restructuring, but as the negotiations have just commenced, it would be too early to describe a new structure in this report already.

Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

4.12 Portugal

Contextual data

Collective bargaining in the agricultural sector concern, in addition to agriculture (NACE 01), the forestry sector. Fishing does not make part of negotiated agreements.

Companies	Of which % without employees	Employees	Employees (% full employment)	Coverage
415.969	98.4%	504.043	41%	100%

The total number of employees is 513.071. This includes permanent workers (61.163), owners who work, non-permanent workers (181.443) and of the agricultural workers not directly hired by the producers (261.437). The source of these data is the INE, *Recenseamento Geral da Agricultura 1999*. If we consider it without owners, we obtain 504.043 employees. Total employment in agriculture is about 1.236.214.

With regard to the current cover rate of conventions for the sector of work, it is approximately 100%, because, according to the CAP, *the Confederação dos Agricultores de Portugal*, there is recent orders of extension for all the activities of the sector.

The employers' organisations are numerous. The most significant were selected.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density ⁺	CB	National affiliation	European affiliation – indirect
Confederação dos Agricultores de Portugal – CAP	Agricultural sector	314 org.	NA	55 %	Yes	CAP	GEOP-ACOPA, USSE, CEA
Confederação Nacional da Agricultura – CNA	Agricultural sector	45 ass.	NA	40 %	No	CNA	CPE

⁺ density estimated by the national expert

Sub-sectoral and regional management organisations:

Federação Portuguesa das Associações Avícolas – FEPASA	Poultry industry	4 ass. (180 companies)	NA	100%	No	CAP	GEOPA-COPA, AVEC, ACE
Associação Portuguesa de Associações de Bovinicultores – FEPABO	Breeding of bovines	16 ass. (30,000 stockbreeders)	NA	50%	No	CAP	GEOPA-COPA, CEA
Associação Nacional de Centros de Abate e Indústrias Transformadoras de Carne de Aves – ANCAGE	Poultry industry	36 companies	NA	65%	Yes	CAP, FEPASA	GEOPA-COPA, AVEC
Federação da Agricultura de Trás-os-Montes e Alto Douro – FATA	Agriculture	8 ass. (36,000 farmers)	NA	52%	No	CAP	GEOPA-COPA
Federação dos Produtores Florestais de Portugal Conselho Nacional da Floresta	Forestry	32 ass. (22,618 producers)	NA	Env 7.5%	No	CAP, CFFP Centre Pinus	GEOPA-COPA, USSE, PEFC
Federação das Associações Portuguesas de Ovinicultores e Caprinicultores – FAPOC	Regional companies	21 associations	NA	75%	No	CAP	GEOPA-COPA, EWG
Associação dos Agricultores do Baixo Alentejo	Regional companies	NA	NA	NA	Yes	CAP	GEOPA-COPA
Associação dos Agricultores do Sul do Tejo	Regional companies	NA	NA	NA	Yes	CAP	GEOPA-COPA
Associação dos Agricultores dos Concelhos de Abrantes, Constância, Sardoal e Mação	Regional companies	NA	NA	NA	Yes	CAP	GEOPA-COPA
Associação dos Agricultores do Ribatejo	Regional companies	NA	NA	NA	Yes	CAP	GEOPA-COPA

+ density calculated in the sub-sector by the expert

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation – indirect
Sindicato Nacional dos Trabalhadores e Técnicos da Agricultura, Florestas e Pecuária	Farming Growing Forestry	Env 4,000	0.8%	Yes	CGTP-IN	FSA
Sindicato da Agricultura, Alimentação e Florestas – SETAA	All	17,080	3.4% (18%)*	Yes	UGT	EFFAT, ETUC

+ density calculated in the sub-sector by the expert

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert. Bold Italic = data from the European organisation Italic = our estimates

4.13 Spain

Contextual data

We include within the agricultural sector the activities of the NACE 01.1 (agricultural production), 01.2 (farming of animals) and 01.3 (combined agricultural production and farming of animals). Consequently, services related to agriculture and cattle raising (NACE 01.4) and hunting and animal capture (NACE 01.5) are excluded. Agricultural organisations, employers and trade unions, represent also forestry sector (NACE 02) but fishing is not part of the negotiating process in agriculture.

Companies	Of which % without employees	Employees	Employees (% full employment)	Coverage
+/-4.560.000	90%	330.000	37%	+/-75%

We can observe that paid employees are less than 37% in the sector, and that 570,600, this is 63% of all employment, is self-employment (managers, family help and co-operative members); in this group, individual or self-employed managers are widely a majority.

It is to be mentioned that seasonal employment is a very significant part of the employment. It is estimated that temporary employment involves between 40 and 45 million working days in a year. This means approximately 20% of agricultural employment in terms of annual work. In the recent years, there has been an increasing presence of immigrant workers among temporary workers. In 1999 above 20,000 work permits were given to foreign workers in the agricultural sector, most of them for seasonal work. Also we should add an unknown number of illegal immigrants.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Asociación Agraria de Jóvenes Agricultores - ASAJA	All	NA	NA	NA	Yes	CEOE	GEOPA-COPA, UNICE
Coordinadora de Organizaciones Agraria y Ganaderas –Incentivia Rural – COAG - IR	All	NA	NA	NA	Yes	-	GEOPA-COPA
Organización Interprofesional de Avicultura de Carne de Pollo del Reino de España - PROPOLLO	Chicken poultry	NA	NA	NA	Yes	FIAB, CEOE	AVEC, UNICE
Federación Española de Empresas de Jardinería – FEEJ	Gardening	NA	NA	NA	Yes	-	-
Sociedad Española de Horticultura - SEH	Horticulture	300	NA	NA	Yes	FEPEX, CEOE, CEPYME	EUCOFEL
Asociación Española de Productores de Huevos - ASEPRHU	Egg producers	150	NA	NA	Yes	ASAJA, INPROVO, FIAB, CEOE	GEOPA-COPA, CIAA, EUWER, UNICE

There is another significant self-employed farmers' organisation, Unión de Pequeños Agricultores (UPA), which is linked to an employees' association, the UGT. This is sectoral employers' organisation of the UGT union, which is strongly established in Galicia, Extremadura, Andalucía and Castilla y León. This organisation signed collective agreements in these areas.

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Unión de Pequeños Agricultores y Ganaderos – UPA	Small agriculturists and cattle dealers	70.000	NA	NA	Yes	UGT	GEOPA-COPA

There is three main collective agreement of national scope in the agricultural sector and a few more than 50 agreements of provincial or autonomy scopes. In some cases, agreements refer to all farming activities, in other cases they are specific, sub-sectoral ones. The undersigning organisations on the managers' part are mainly

linked to ASAJA and after to COAG and UPA. On the trade unions' part, FTT-UGT and FA-CCOO clearly appear as the participant unions. It is to be mentioned that both unions together have 90.7% of representativeness in the sector according to data from the elections to workers' delegates in the agricultural companies.

Despite of the characteristics of the sector, collective bargaining coverage appears formally high. According to data from the Ministry of Labour, almost 750,000 workers are covered by collective agreements, twice as many employees as the ones recognised by the INE. This apparent contradiction is explained by the fact that temporary employment is difficult to be quantified and, at the same time, collective agreements overlap, a fact introducing remarkable difficulties to know the number of employees included in each of them. However, as it has been said, presence of illegal immigration is important in the sector as well as presence of irregular working ways, so an undetermined part of employees are out of the coverage of collective agreements.

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members	Density*	CB	National affiliation	European affiliation – indirect
FTT-UGT	All	26.500	8%	Yes	UGT	EFFAT, ETUC
FA-CCOO	All	20.000	6%	Yes	CCOO	EFFAT, ETUC

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

4.14 Sweden

Contextual data

From a statistical viewpoint, the agricultural sector refers to activities gathered under the NACE classification A 01 (01.1 to 01.4): agriculture, growing and related service activities.

Agriculture represented in 2000 approximately 3,5% of the Swedish working population occupied. The agricultural branch is a sector where dominates the self-employed workers (approximately 121 000). The volume of employees is approximately 22 300 dependent workers, that is 0,6% of the total paid employment in Sweden.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
129.176	94 %	99.8 %	0.2 %	22.300	18.4%	69%	5.5 %	>70%

The agricultural sector counts one employers' organisation and 8 trade-union federations signatories of branch collective agreements. On the level of the sector, one counts 12 collective agreements. The sub-mentioned organisation as well employers' as trade unions takes part in sectoral collective bargaining and plays a major role in the regulation of wages and working conditions.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Skogs och Lantarbetsgivarförbundet – SLA	Agricultural and horticultural companies	3.000	12.500 ⁶⁴	56% (40 %)	Yes	SAF	GEOPA-COPA, UNICE

⁶⁴ Figure communicated by European organisation GEOPA-COPA : 23.000

Several collective bargaining are concluded. These are signed by the eight labour organisations, depending of their sectoral specification. The undersigning organisation on the managers' part is only the Skogs och Lantarbetsgivarförbundet (SLA).

Labour organisations negotiating collective agreements

Employees	Types of employees recovered	Members (affiliated to the sector)	Density*	CB	National affiliation	European affiliation - indirect
Svenska lantarbetareförbundet – SLF-LO	Blue collars, skilled workers, conducting of tractors, machinists, foremen	13 000 (7000)	3.2% (54%)**	Yes	LOI	EFFAT, ETUC
Skogs och Lantbruksfjänstemanförbundet - SLF-TCO	White collars, employees	1.250 (477)	5.6% (>70%)**	Yes	TCO	EFFAT, ETUC, EUROCADRE
Tjänstemannaförbundet - HTF	White collars, employees	149.850 (400)	1.7% (40 - 45%)**	Yes	TCO	EFFAT, ETUC, EUROCADRE
Svenska Industrifjänstemanförbundet - SIF	White collars, employees	294 800 (400)	1.7% (>80%)**	Yes	TCO	EFFAT, ETUC, EUROCADRE
Agriack	Agricultural and horticultural engineers, landscape designers, intendants	5.000 (500)	2.2% (50 - 70%)**	Yes	SACO	ETUC, EUROCADRE
Sveriges Veterinärförbunde – SVF	Veterinary	1.750 ()	1.1% (95%)**	Yes	SACO	ETUC, EUROCADRE
Sveriges Civilingenjörförbund - CF	White collars, engineers, senior executives	63 672 (20)	0.08% (80 - 90%)**	Yes	SACO	ETUC, EUROCADRE
Ledarna	Average frameworks, foremen, senior executives	60 910 (420)	1.9% (>70%)**	Yes	Independent	CEC

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

** () Density rate is the number of members divided by the potential members in respective subsectors/occupations, estimated by the national expert. Let us stress that the national expert disagree with our way of calculating density.

Bold = data from the national expert.

Bold Italic = data from the European organisation

Italic = our estimates

4.15 United Kingdom

Contextual data

From a collective bargaining viewpoint, the agricultural sector refers to activities gathered under the NACE classification A 01 and 02: agriculture, hunting and forestry.

Employees	Employees (% full employment)	Coverage
+/-200.000	4.3%	-

There are three Agricultural Wages Boards which set statutory minimum terms and conditions for agricultural workers in England and Wales, Scotland and Northern Ireland.

- ❑ Agricultural Wages Board for England and Wales: this wages board is made up of eight employer's representatives (from the National Farmers' Union - NFU), an equal number of workers representatives from the Transport and General Worker Union - TGWU and five government-appointed independent members. Negotiates pay and conditions for around 110,000 farm and horticultural workers.
- ❑ Agricultural Wages Board for Northern Ireland: this wages board is made up representatives from the Ulster Farmers Union and the ATGWU. It negotiates pay and conditions for around 60,000 employees.
- ❑ Agricultural Wages Board for Scotland: this wages board is made up of 10 members – five independent members, employer's representatives (NFU Scotland and the Scottish Landowners Federation) and employee representatives from the Rural, Agricultural and Allied workers national trade group (Scotland) of the TGWU. It negotiates pay and conditions for around 25,000 workers.

The Wages Boards set minimum hourly rates, holidays and overtime rates.

The Forestry Commission negotiates with four trade unions on the pay and conditions of its 1,700 industrial staff. The Commission has one million hectares of UK woodland and this remains in the public sector. The management functions have been transferred to an agency called Forest Enterprise.

Management organisations negotiating collective agreements

<i>Employers</i>	<i>Type of companies covered</i>	<i>Companies</i>	<i>Employees</i>	<i>Density*</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirect</i>
National Farmers' Union – NFU	Agriculture, Horticulture	70.000 farmers	NA	NA	Yes	NFU	GEOPA-COPA
National Farmers' Union of Scotland	Agriculture, Horticulture	9,500 members	NA	80% of full time farmers in Scotland	Yes	CBI	GEOPA-COPA, CEA, UNICE
Ulster Farmers' Union – UFU	Agriculture, Horticulture	13.000 members	NA	40-70% of full time farmers in Ulster	Yes	CBI	GEOPA-COPA, UNICE

There are three different organisations representing farmers and growers. They are all called Farmers' Unions and represent farmers in England and Wales, Scotland and Northern Ireland. Their main function is the same: to promote and protect the interests of farmers and growers.

The NFU is regularly consulted by Government as the major representative organisation for farming and horticulture. The NFU sits on the Agricultural Wages Board for England and Wales. As well as being consulted at national level, regional NFU officials are consulted at local government level.

The NFU Scotland sits on the Scottish Agricultural Wages Board with the Scottish Landowners Federation.

The UFU provides nominations to a range of Government bodies at both Northern Ireland and UK level. This includes the Agricultural Wages Board.

Labour organisations negotiating collective agreements

<i>Employees</i>	<i>Types of employees recovered</i>	<i>Members</i>	<i>Density*</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirect</i>
Rural, agricultural and allied workers – RAWW, a section of the Transport and General Worker Union - TGWU	All	20.000	10%	Yes	TUC	EFFAT, ETUC

The TGWU is the only trade union that sits on the three Agricultural Wages Board. It also negotiates with local and national companies in the horticulture, seafood, poultry, sugar and mushroom sectors where negotiations normally take place at the company/plant level.

*Density is the ratio between affiliates or employees covered of an organisation and the total employees of the sector.

Bold = data from the national expert. Bold Italic = data from the European organisation Italic = our estimates

5. Appendix

5.1 Acronyms mentioned in this report

Acronym	Country	Organisation
AAB	BE	Alliance Agricole Belge
ABS	BE	Algemeen Boeren Syndicat
ANCAVE	PO	Associação Nacional de Centros de Abate e Indústrias Transformadoras de Carne de Aves
ANDAA	IT	Associazione Nazionale Dirigenti Aziende Agricole
ASAJA	SP	Asociación Agraria de Jóvenes Agricultores
ASEPRHU	SP	Asociación Española de Productores de Huevos
BDA	DE	Bundesvereinigung der Deutschen Arbeitgeberverbände
BGL	DE	Bundesverband Garten-, Landschafts- und Sportplatzbau e.V.
CAP	PO	Confederação dos Agricultores de Portugal
CBI	UK	Confederation of British Industry
CCAS	BE	Centrale Chrétienne de l'Alimentation et des Services
CC.OO	SP	Comisiones Obreras
CEA	EU	?? Conf euro de l'agri??
CEC	EU	Confédération Européenne des Cadres
CEOE	SP	Confederación Española de Organizaciones Empresariales
CEPYME	SP	Confederación Española de la Pequeña y Mediana Empresa
CES	EU	Confédération Européenne des Syndicats
CESI	EU	Confédération Européenne des Syndicats Indépendants
CF	SW	Sveriges Civilingenjörskörbundet
CFA	FR	Confédération Française de l'Aviculture
CFDT	FR	Confédération Française Démocratique du Travail
CFTC	FR	Confédération Française des Travailleurs Chrétiens
CGC	FR	Confédération Générale des Cadres
CGIL	IT	Confederazione Generale Italiana del Lavoro
CGSLB	BE	Confédération Générale des Syndicats Libéraux de Belgique
CGT	FR	Confédération Générale du Travail
CGT-L	L	Confédération Générale du Travail Luxembourgeoise
CGTP-IN	PO	Confédération Générale des Travailleurs Portugais
CIA	IT	Confederazione Italiana Agricoltori
CIDA	IT	Confederazione Italiana Dirigenti d'Azienda
CISL	IT	Confederazione Italiana Sindacati Lavoratori
CNA	PO	Confederação Nacional da Agricultura
CNC	NL	Coöperatieve Nederlandse Champignon-kwekers-vereniging
CNJA	FR	Centre Nationale des Jeunes Agriculteurs
CNV	NL	Christelijk Nationaal Vakverbond
COAG-IR	SP	Coordinadora de Organizaciones Agraria y Ganaderas
Coldiretti	IT	Confederazione Nazionale Coltivatori Diretti
Confagricoltura	IT	Confederazione Generale dell'Agricoltura Italiana
Confederdia	IT	Confederazione Italiana Dirigenti, Quadri e Impiegati dell'Agricoltura
CPE	EU	Confédération Paysanne Européenne
CSC	BE	Confédération des Syndicats Chrétiens
CUMELA	NL	Cultuurtechnischewerken en grondverzet, meststoffen-distributie en loonwerken in de agrarische sector
DGB	DE	Deutscher Gewerkschaftsbund
EFBWW	EU	European Federation of Building and Woodworker
EFFAT	EU	European Federation of Food, Agriculture and Tourism workers
ELCA	EU	European Landscape Contractors Association
ETUC	EU	European Trade Union Confederation
FATA	PO	Federação da Agricultura de Trás-os-Montes e Alto Douro
FAPOC	PO	Federação das Associações Portuguesas de Ovinicutores e Caprinicutores
FDF	DE	Fachverband Deutscher Floristen e.V.
FEAP	EU	Fédération Européenne d'Architecture du Paysage
FEEJ	SP	Federación Española de Empresas de Jardinería
FEPAB	PO	Associação Portuguesa de Associações de Bovinicutores
FEPASA	PO	Federação Portuguesa das Associações Avícolas
FGA	FR	Fédération Générale de l'Alimentaire
FGSOA	FR	Fédération Générale des syndicats de Salariés des Organisations professionnelles de l'Agriculture et de l'industrie agroalimentaire
FGTA	FR	Fédération générale des travailleurs de l'alimentation et service – FO
FGTB	BE	Fédération Générale du Travail de Belgique
FIPA	INT	International Federation of Agriculture Producers

FISBA	IT	Federazione Italiana Salariati, Braccianti e Tecnici Agricoli
FLAI	IT	Federazione Nazionale Lavoratori dell'Agroindustria
FLB	L	Fräie Letzebuërger Bauverban
FNAF	FR	Fédération Nationale Agroalimentaire et Forestière
FNSEA	FR	Fédération Nationale des Syndicats d'Exploitants Agricoles
FNV	NL	Federatie Nederlandse Vakbeweging
FO	FR	Force Ouvrière
FWA	BE	Fédération Wallonne de l'Agriculture
GANG	AU	Gewerkschaft Agrar-Nahrung-Genuß
GEOPA-COPA	EU	Groupement des Employeurs des Organisations Professionnelles Agricoles de l'Union Européenne – Confédération des Organisations Professionnelles Agricoles de l'Union Européenne
GESASE	GR	General Confederation of Agricultural Association of Greece
GLTO	NL	Gewestelijke Land- en Tuinbouworganisatie
GÖD	AU	Gewerkschaft Öffentlicher Dienst
GPA	AU	Gewerkschaft des Privatangestellten
GSEE	GR	Confédération Générale des Travailleurs Grecs
HTF	SW	Tjänstemannaförbundet
IBEC	IE	Irish Business and Employers Confederation
ICFTU	INT	International Federation of Free Trade Unions
ICMSA	IE	Irish Creamery Milk Suppliers Association
ICOS	IE	Irish Co-operative Organisation Society limited
ICTU	IE	The Irish Congress of Trade Union
IFA	IE	Irish Farmers Association
IFAP	INT	International Federation of Agriculture Producers
IVU	IE	Irish Veterinary Union
LCB	NL	Landelijk Contactorgaan Bedrijfsverzor- Gingsdiensten
LCBG	L	Confédération des Syndicats Chrétiens du Luxembourg
LLTB	NL	Limburgse Land- en Tuinbouworganisatie
LO	DK	Landsorganisationen i Danmark
LO	SW	Landsorganisationen i Sverige
LTO	NL	Land- en TuinbouwOrganisatie
MHP	NL	Vakcentrale voor Middelbaar en Hoger Personeel
MKB	NL	Midden en Klein Bedrijf
MODEF	FR	Confédération nationale des syndicats d'exploitants nationaux
MTL	FI	Maaseudun Työntäjiliitto
NBVB	NL	Nederlandse Bond voor Boomkwekers
NFU	GB	National Farmers' Union
NFUS	GB	National Farmers' Union of Scotland
NLTO	NL	Noordelijke Land- en Tuinbouworganisatie
NVO	NL	Nederlandse Veeverbeteringsorganisatie
ÖGB	AU	Österreichischer Gewerkschaftsbund (Austrian Trade Union Federation)
ÖGB-L	L	Confédération syndicale indépendante - Luxembourg
OLAF	AU	Obmännerkonferenz der Arbeitgeberverbände der Land und Forstwirtschaft
OSEGO	GR	Omospondia Syndikaton Ergazomenon Georgikon Organosseon
PASEGES	GR	Panhellenic Confederation of Unions of agricultural cooperatives
PKLWK	AU	Präsidentenkonferenz der Landwirtschaftskammern
PROPOLLO	SP	Organización Interprofesional de Avicultura de Carne de Pollo del Reino de España
PUU-Ja	FI	Puu- ja Eriyisalojen Liitto
RAWW	UK	Rural, agricultural and allied workers
SACO	SW	Sveriges Akademikers Centralorganisation
SAF	SW	Svenska Arbetsgivareföreningen
SAK	FI	Suomen Ammattiliittojen Keskusjärjestö
SALA	DK	Sammenslutningen af Landbrugets Arbejdsgiverforeninger
SEH	SP	Sociedad Española de Horticuultura
SETAA	PO	Sindicato da Agricultura, Alimentação e Florestas
SIF	SW	Svenska Industritjänstemannaförbundet
SIPTU	IE	Services Industrial Professional Technical Union
SLA	SW	Skogs och Lantarbetsgivareförbundet
SLF-LO	SW	Svenska lantbrukstjänstemannaförbundet
SLF-TCO	SW	Skogs och Lantbrukstjänstemannaförbundet
SNA	FR	Syndicat National des Accouveurs
SNCEA	FR	Syndicat National des Cadres d'Entreprises Agricoles
SNGP	FR	Syndicat National des employeurs de Gardes Particuliers de chasse et pêche
STCPOA	FR	Syndicat des Travailleurs de la Confédération Paysanne et Organisations affiliées
SVF	SW	Sveriges Veterinärförbunde
TCO	SW	Tjänstemännens Centralorganisation
TGWU	UK	Transport and General Worker Union
TT	FI	Teollisuuden ja Työntäjain

TUC	UK	Trade Union Congress
UEAPME	EU	Union Européenne de l'Artisanat et des Petites et Moyennes Entreprises
UFU	UK	Ulster Farmers' Union
UGC	IT	Unione Generale Coltivatori
UGT	PO	União Geral de Trabalhadores
UGT	SP	Unión General de Trabajadores
UIL	IT	Unione Italiana Lavoratori
UILA	IT	Unione Italiana Lavoratori Agroalimentari
UIMEC	IT	Unione Italiana Mezzadri e Coltivatori Diretti
UISTAACT	INT	Union Internationale des Syndicats des Travailleurs de l'Agriculture, de l'Alimentation et de l'industrie Textile et similaires
UNICE	EU	Union des confédérations de l'industrie et des employeurs d'Europe
UNSA	FR	Union Nationale des Syndicats Autonomes
UPA	BE	Union Professionnelle Agricole
UPA	SP	Unión de Pequeños Agricultores
VHG	NL	Vereniging Hoveniers en groenvoorzieners
VHP	NL	Vakorganisatie voor Middelbaar en hoger Personeel
VNO-NCW	NL	Vereniging Nederlandse Ondernemingen- Nederlands Christelijk Werkgeversverbond
VOA	IE	The Veterinary Officers' Association
WLTO	NL	Westelijke Land- en Tuinbouworganisatie
ZLTO	NL	Zuidelijke Land- en Tuinbouworganisatie

5.2 Economic classification by activity NACE 4⁶⁵

A. AGRICULTURE, HUNTING AND FORESTRY

01 Agriculture, hunting and related service activities

011 Growing of crops; market gardening; horticulture

0111 - Growing of cereals and other crops n.e.c.

0112 - Growing of vegetables, horticultural specialties and nursery products

0113 - Growing of fruit, nuts, beverage and spice crops

012 Farming of animals

0121 - Farming of cattle, dairy farming

0122 - Farming of sheep, goats, horses, asses, mules and hinnies

0123 - Farming of swine

0124 - Farming of poultry

0125 - Other farming of animals

013 Growing of crops combined with farming of animals (mixed farming)

0130 - Growing of crops combined with farming of animals (mixed farming)

014 Agricultural and animal husbandry service activities, except veterinary activities

0141 - Agricultural service activities

0142 - Animal husbandry service activities, except veterinary activities

015 Hunting, trapping and game propagation including related service activities

0150 - Hunting, trapping and game propagation including related service activities

02 Forestry, logging and related service activities

020 Forestry, logging and related service activities

0201 - Forestry and logging

0202 - Forestry and logging related service activities

B. FISHING

05 Fishing, operation of fish hatcheries and fish farms; service activities incidental to fishing

050 Fishing, operation of fish hatcheries and fish farms; service activities incidental to fishing

0501 - Fishing

0502 - Operation of fish hatcheries and fish farms

⁶⁵ In the report, we have used the classification NACE 5

5.3 Employers' associations that negotiate collective agreements

Cou ntry	Employee s	Employers	Enterprises	Employees	Density	CB	National affiliation	European affiliations – <i>indirect</i>
Ger man y	600,000	Gesamtverband	NA	NA	NA	Yes	BDA	GEOPA-COPA, UNICE
		AALG ⁶⁶	NA	NA	NA	Yes	BDA	UNICE
		AGA ⁶⁷	NA	NA	NA	Yes	BDA	UNICE
AT	45,191	OLAF	931	NA	NA	Yes	OLAF	GEOPA-COPA
B	30,081	Boerenbond	17,000	NA	NA	Yes	-	GEOPA-COPA
		FWA	11,000	NA	NA	Yes	-	GEOPA-COPA
		ARCSH ⁶⁸	200	NA	NA	Yes	ABS	
		FHPB ⁶⁹	1,800	NA	NA	Yes	Boerenbond	GEOPA-COPA
		CNAS ⁷⁰	300	NA	NA	Yes	Unizo	CEETAR
DK	101,605	GA ⁷¹	530	8,000	8%	Yes	SALA	GEOPA-COPA
		LSA ⁷²	100	12,000	12%	Yes	SALA	GEOPA-COPA
		KA ⁷³	103	600	0.5%	Yes	Håndværksrådet	UEAPME
SP	330,000	ASAJA	NA	NA	NA	Yes	CEOE	GEOPA-COPA, UNICE
		COAG-IR	NA	NA	NA	Yes	-	GEOPA-COPA
		UPA	70,000	NA	NA	Yes	UGT	GEOPA-COPA
		PROPOLLO	NA	NA	NA	Yes	FIAB, CEOE	AVEC, UNICE
		SEH	300	NA	NA	Yes	FEPEX, CEOE, CEPYME	EUCOFEL
		FEEJ	NA	NA	NA	Yes	-	-
		ASEPRHU	NA	NA	NA	Yes	ASAJA	EUWEP, UNICE
FI	54,000	MTL	1,024	9,000	16.7%	Yes	TT	GEOPA-COPA, UNICE
FR	800,000	FNSEA	135,000	NA	NA	Yes	FNSEA	GEOPA-COPA, CEA
		CP ⁷⁴	NA	NA	NA	Yes	-	CPE
		MODEF	NA	NA	NA	Yes	-	CPE
		FFA ⁷⁵	NA	NA	NA	Yes	-	-
		SNA	NA	NA	NA	Yes	-	-
		SNGP	NA	NA	NA	Yes	-	-
GR	25,199	PASEGES	7000 coop,	NA	NA	Yes	-	GEOPA-COPA, CEA
IRL	123,800	IFA	8000	85,000	68%	Yes	IBEC	GEOPA-COPA, UNICE
		ICMSA	NA	30,000	24%	Yes	-	-
		ICOS	30 to 40	3,000	2.4%	Yes	-	-
IT	451,000	Coldiretti	568,000	NA	NA	Yes	Coldiretti	GEOPA-COPA
		Confagricoltura	685,000	NA	NA	Yes	Confagricoltura	GEOPA-COPA, CEA
		CIA	880,023	NA	NA	Yes	CIA	GEOPA-COPA
LUX	742	-	-	-	-	-	-	-
NL	120,000	LTO Nederland	74,000	30,000	25%	Yes	LTO	GEOPA-COPA
		NBVB	1,850	NA	NA	Yes	LTO	GEOPA-COPA
		CNC	450	4,300	3.5%	Yes	LTO	GEOPA-COPA
		NVO	20	3,300	2.75%	Yes	LTO	GEOPA-COPA
		Plantum NL	500	2,400	2%	Yes	VNO-NCW	UNICE
		VHG	1,155	11,767	9.8%	Yes	VNO-NCW, MKB Nederland	UEAPME, ELCA, UNICE
		CUMELA	1,574	13,457	11.5%	Yes	MKB Nederland	UEAPME
		LCB	17	11,404	9.5%	Yes	AWVN, LTO	GEOPA-COPA
PT	504,043	CAP	314 org,	NA	NA	Yes	CAP	GEOPA-COPA, CEA
UK	200,000	NFU	70,000	NA	NA	Yes	NFU	GEOPA-COPA
		NFUS	9,500	NA	NA	Yes	CIB	GEOPA-COPA, UNICE
		UFU	13,000	NA	NA	Yes	CIB	GEOPA-COPA, UNICE
S	22,300	SLA	3,000	12,500	56%	Yes	SAF	GEOPA-COPA, UNICE

⁶⁶ AALG: our acronym for Arbeitsgemeinschaft der Arbeitgebervereinigungen im ländlichen Genossenschaftswesen

⁶⁷ AGA: our acronym for Arbeitsgemeinschaft der gärtnerischen Arbeitgeberverbände

⁶⁸ ARGSH: our acronym for Association Royale Chambre Syndicale de l'Horticulture - Koninklijke Syndicale Kamer van de Belgische Tuinbouw

⁶⁹ FHPB: our acronym for Fédération des Horticulteurs et Pépiniéristes de Belgique

⁷⁰ CNAS: our acronym for Centre Nationale Agro-Service/Nationale Centrale Landbouw-Service

⁷¹ GA: our acronym for Gartneribrugets Arbejdsgiverforening

⁷² LSA: our acronym for Land og Skovbrugets Arbejdsgivere

⁷³ KA: our acronym for Kristelig Arbejdsgiverforening

⁷⁴ CP: our acronym for Coordination Paysanne

⁷⁵ FFA: our acronym for Fédération Française d' Aquaculture

5.4 Trade unions that negotiate collective agreements

Country	Employees	Name	Members	Density	NC	National affiliation	European affiliations – indirect
Germany	600,000	IG Bauen ⁷⁶	56,511	9.5%	Yes	DGB	EFFAT, ETUC
Austria	45,191	GANG	42,841*	NA	Yes	ÖGB	EFFAT, EAL, ETUC,
		GPA	5,600	12.3%	Yes	ÖGB	EFFAT, ETUC
		GÖD	550	1.2%	Yes	ÖGB	EFFAT, ETUC
Belgium	30,081	CCAS	6,477	21%	Yes	CSC-ACV	EFFAT, ETUC
		FGTB	2,400	7.9%	Yes	FGTB-ABVV	EFFAT, ETUC
		CGSLB	438	1.5%	Yes	CGSLB-ACLVB	CESI
Denmark	101,605	Sid GLS groups	14,000	13.78%	Yes	LO	EFFAT, ETUC
		Kristelig fagforening	270	0.27%	Yes	-	-
Spain	330,000	FTT-UGT	26,500	8%	Yes	UGT	EFFAT, ETUC
		FA-CC,OO	20,000	6%	Yes	CC.OO	EFFAT, ETUC
Finland	54,000	PUU-Ja	9,000	16.7%	Yes	SAK	EFFAT, ETUC, EFBWW
France	800,000	FNAF-CGT	1,700	NA	Yes	CGT	-
		FGA-CFDT	2,500-3,000	0.38%	Yes	CFDT	ETUC
		CFTC	1,800	0.23%	Yes	CFTC	Confédération mondiale du travail, FEMTA
		FGTA-FO	6,150	0.81%	Yes	FO	ETUC
		CGC	NA	NA	Yes	CFE-CGC	CEC
		FGSOA	12,000	1.5%	Yes	UNSA	ETUC
		STCPOA	NA	NA	Yes	-	-
Greece	25,199	OSEGO	9,629	38%	Yes	GSEE	EFFAT, ETUC
Ireland	123,800	SIPTU	7,000	5.6%	Yes	ICTU	EFFAT, ETUC, ECF, EMCEF, EMF, IUF
		VOA	315	0.2%	Yes	ICTU	ETUC
		IVU	665	0.5%	Yes	ICTU	EFFAT, ETUC
Italy	451,000	FLAI-CGIL	302,510	27.6%*	Yes	CGIL	EFFAT, ETUC
		FISBA-CISL	179,311	16%*	Yes	CISL	EFFAT, ETUC
		UGC-CISL	67,752	6%*	Yes	CISL	EFFAT, ETUC
		UILA-UIL	142,192	12.7%*	Yes	UIL	EFFAT, ETUC
		UIMEC-UIL	41,869	3.7%*	Yes	UIL	EFFAT, ETUC
		Confederdia	NA	NA	Yes	Confederdia	-
		ANDAA	1,500	0.13%*	Yes	CIDA	CEC
Luxembourg	742	OGB-L	286	38%	Yes	CGT-L	EFFAT, ETUC
		LCBG	NA	NA	Yes	LCBG	EFFAT, ETUC
Netherlands	120,000	FNV Bondgenoten	17,000	14.2%	Yes	FNV	EFFAT, ETUC
		CNV Bedrijvenbond	6,800	5.7%	Yes	CNV	EFFAT, ETUC
		De Unie	219	0.1%	Yes	UOV, Unie MHP	ETUC
		VHP BVVN	NA	NA	Yes	UOV, Unie MHP	ETUC
Portugal	504,043	SNTTAFP ⁷⁷	4,000	NA	Yes	CGTP-IN	FSA
		SETAA	17,080	3.4%	Yes	UGT	EFFAT, ETUC
United Kingdom	200,000	RAWVW-TGWU	20,000	10%	Yes	TUC	ETUC
Sweden	22,300	SLF-LO	7,000	32%	Yes	LOI	EFFAT, ETUC
		SLF-TCO	477	5.6%	Yes	TCO	EFFAT, ETUC, Eurocadres
		HTF	400	1.7%	Yes	TCO	EFFAT, ETUC, Eurocadres
		SIF	400	1.7%	Yes	TCO	EFFAT, ETUC, Eurocadres
		Agrifack	500	2.2%	Yes	SACO	ETUC, Eurocadres
		SVF	250	1.1%	Yes	SACO	ETUC, Eurocadres
		CF	20	0.08%	Yes	SACO	ETUC, Eurocadres
		Ledarna	420	1.9%	Yes	-	CEC

* density estimated on total employment

⁷⁶ IG Bauen-Agrar-Umwelt

⁷⁷ SNTTAFP: our acronym for Sindicato Nacional dos Trabalhadores e Técnicos da Agricultura, Florestas e Pecuária