Recent developments in the European Sectoral Social Dialogue

European Commission

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European Commission
Directorate-General for Employment, Social Affairs
and Equal Opportunities
Unit D.1

Manuscript completed in December 2005

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Cataloguing data can be found at the end of this publication.

Luxembourg: Office for Official Publications of the European Communities, 2006

ISBN 92-79-00242-2

Printed in Belgium

PRINTED ON WHITE CHLORINE-FREE PAPER

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INTRODUCTION

Social dialogue between representative organisations of workers and employers at all levels is essential for the development of globally competitive business, efficient public authorities and good practice in employment. Social dialogue is a characteristic of the employment relationship in the Member States of the EU and is firmly embedded at the European level, both across and within economic sectors. Its success is derived from the commitment of the social partners to the effective representation of their member organisations and to their engagement with each other in informed discussion leading to joint outcomes. This is underpinned by a Community framework that encourages and supports social dialogue as central to developing good practice, based on understanding and agreement. In this way actions can be implemented through involvement and commitment and lead to successful outcomes for employers and workers alike.

Sectoral social dialogue produces outcomes of practical importance and makes a significant contribution to the governance of the EU as a whole. This dual role explains the growing importance of sectoral social dialogue and the decisions to support and enhance its role made when the foundations were laid in 1998, the strategy set by the Lisbon Agenda in 2000 and the position consolidated through the Commission Communications of 2002 and 2004[1]. The significance of sectoral social dialogue is made clear when we note that over 70 million workers and nearly six million undertakings can be covered by the decisions, declarations and agreements of the social partners. Sectoral social dialogue is central to the EU's continuing ability to compete in a global economy.

THE SOCIAL PARTNERS

Sectoral social dialogue at European level has its roots in informal relations between representative bodies of workers and employers in the 1960s and 1970s. It developed alongside cross-sector arrangements as workers and employers saw the importance of ensuring that Community strategies and actions reflected the needs of their particular industries. As social dialogue grew, the social partners recognised the importance of the opportunities for the exchange of views and of the need to formalise arrangements to ensure regular meetings and real commitment. For this to happen, the representative nature of employer and worker organisations had to be recognised and consolidated and structural reforms would lead to the creation of effective bodies in this respect. This practice is important to the development of the EU as new Member States join and need to add their weight to the sectoral social dialogue. As we can see from the examples in this report, many Sectoral Social Dialogue Committees (SSDCs) have responded to the challenge of an expanded Community by working with their partners in new and candidate countries to support them in building their capacity, so that they can make a meaningful contribution the social dialogue process. The sectoral organisations listed in the report can all lay claim to their representativeness that is continuously monitored in sectoral studies (see the technical note below). This, together with their social mandate, gives them the authority to negotiate and, where it is appropriate, to reach agreements.

1 COM(2002) 341 final, COM(2004) 557 final.

EMPLOYERS' ORGANISATIONS

In the context of social dialogue, employer's organisations, like their workers' equivalents, operate at levels from the local to the national, to the European and the global. They function to represent the interests of their members to the public authorities and to seek agreements with the representative organisations of workers. At the European level the cross-sector representatives of the employers are UNICE which represents the interests of European business and industry along with UEAPME that represents SMEs and CEEP which covers enterprises with public participation. At the sector level, employer organisations also represent each of these interest groups dependent on the enterprise composition of the particular industry. This may lead to a difference in employer organisations which may represent individual companies directly where large-scale enterprises dominate a sector or, more commonly, national associations of employers. The most important point remains their social mandate from their affiliated organisations and their embeddedness in the industry that ensures they are representative of all employers.

WORKERS' ORGANISATIONS

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

At European level, the cross-industry trade union organisation is the European Trade Union Confederation (ETUC). Sector organisations of unions at the European level work closely with the ETUC and with the international organisations that operate in their sector. They also advise and work with national unions, particularly in relation to the European dimension and the emergence, for example, of European Works Councils. As with employer organisations, their embeddedness within a sector ensures the representativeness that gives them the authority to speak on behalf of the workforce.

ACTIONS OF THE SECTORAL SOCIAL DIALOGUE COMMITTEES

SSDCs have developed forms of action to enable them to respond flexibly in relation to their own needs, to the interests of their sectors and within the scope of the authority laid down by the Commission. In effect there are three key areas where they might seek to take action. Firstly, in influencing their own members within the sector, secondly in ensuring that the sector's views are heard beyond the confines of the particular industry and thirdly to negotiate agreements for implementation.

In the first case, the SSDCs must be authoritative so, as well as being guided by experts, they may also initiate their own activities and commission analysis and research in their sector; for example, surveys of policies on equal opportunities or teleworking or the analysis of health and safety issues specific to their industry. In order to disseminate this information and encourage the development of best practice the social partners might hold conferences and seminars or create training packages.

In ensuring their views are heard beyond the sector, the social partners might seek to comment on specific areas of policy or make contributions to broader debates. They might make declarations or have opinions in relation to themes that cut across sectors, such as in relation to trade liberalisation, EU enlargement or lifelong learning.

Finally, the SSDCs might seek to adopt joint texts for a sector. These may take the form of guidelines or codes of conduct that depend on the efforts of national organisations for their effectiveness and, in doing so, disseminate good practice through a sector. More formally, agreements in the sector may lead to Community directives such as in the area of working time.

The flexibility of forms of action allows SSDCs to develop initiatives in accordance with the needs of their sector and encourages the social partners to agree on actions that they are committed to and have ownership of.

OUTCOMES AND ACTIVITIES

The factors outlined above account for the high level of activity in SSDCs. Truly representative bodies can choose appropriate forms of action for their sector and influence decision-making at both the national and European level. The examples of this are illustrated in each of the sector reports but it is clear that common themes are emerging and driving the dialogue forward into the 21st century.

Social partners in new Member States and candidate countries

There is no doubt that EU enlargement has been a major issue for SSDCs and one they have taken very seriously. The social partners in candidate countries are important agents in the successful negotiation of entry and also demonstrate the effectiveness of the social institutions of those countries. In order to support and reinforce the work of the social partners in new Member States and candidate countries the SSDCs have taken a series of initiatives in conferences and round tables to actively engage with them and help them build their capacity to work effectively. Examples are as diverse as the live performance, private security and tanning and leather SSDCs. In live performance the social partners took the opportunity in 2004 to organise a conference, leading to a joint opinion highlighting the importance of freedom of association, the representativeness of the social partners with mandates to negotiate and reach agreements. Three regional round tables are now planned to strengthen the social dialogue. In private security, the social partners issued a joint declaration to reinforce action to help the new Member States and candidate countries harmonise their private security systems within the European model and followed this up with a further conference in 2005. In the same year in the tanning and leather SSDC a capacity-building project was launched to develop the skills of the new social partners in establishing independent social dialogue in their own countries and in contributing to the European SSDC.

Sector restructuring

Trade liberalisation, privatisation and global competition have all led to major restructuring across EU economic sectors. No industry has been impervious to change whether it has been in the management of employment opportunities, the opening up of new or redefined niche markets or the implementation of technological change amongst a range of different factors. SSDCs have responded to restructuring through policy development, joint opinions and disseminating ideas and action through seminars, conferences and training. In the shipbuilding sector for example, the social partners have participated in a high-level group called 'LeaderSHIP 2015' aimed at initiating a programme to ensure the long-term future of the sector. They are also preparing a 'tool box' containing information about legislation and best practice across Europe to help deal with cyclical fluctuations in demand. Mining is another industry where global change has led to massive employment and enterprise restructuring and new environmental policies have had important structural impacts. The SSDC has responded to each of these developments through joint opinions and in 2004 organised a conference, which encouraged good practice in a time of restructuring by developing the theme of information and consultation and the future of mines in Europe.

Corporate Social Responsibility

Restructuring and globalisation present enormous challenges to the public authorities and to the large multinational corporations at the forefront of change. The social partners recognise the importance of acting in ways that protect our world and its peoples and deliver the benefits of growth to all. Ideas of Corporate Social Responsibility (CSR) now permeate the business community and are becoming central to their activities. Workers' organisations are critical to ensuring that CSR strategies are developed and implemented and it is no surprise to find this area assuming significant importance as, for example, is demonstrated by action in areas as diverse as sugar, banking and the hospitality sector (HORECA). In the latter, the social partners took an initiative in 2004 to encourage action beyond existing legal requirements in areas such as equal opportunities and working conditions and made provision for regular follow up work. In Banking, a joint statement in 2005 encouraged organisations to adopt good practice in areas such as work-life balance, parental leave and flexible working arrangements. The SSDC supported this with further encouragement to banks to improve internal communications and employment relations procedures. Action in the sugar sector has been ongoing, given the importance of some of the issues globally. For instance, in 2001 a joint declaration on social responsibility deplored the use of child labour as a mechanism for competing on costs. A 2003 Code of Conduct covering key areas such as human rights and fair pay followed this and the SSDC has now issued two annual reports assessing the implementation of the Code.

Core Labour Standards

A key element in ensuring CSR is the adoption of the ILO core labour standards on freedom of association, the right to collective bargaining, bans on forced and child labour and freedom from discrimination. It is particularly important, as the EU itself enlarges and as companies engage in global markets, that the highest standards are established worldwide to protect workers from exploitation. Activity in this respect needs to take place at different levels, from the incorporation of ILO standards into international agreements to their implementation in the smallest enterprise. The ILO standards are already embedded in good practice across the EU but SSDCs have been keen to take action to ensure that member organisations are at the forefront of implementing the standards, establishing best practice and raising awareness. Longstanding agreements are being updated or adapted, thus, in textiles for example, the agreement on a code of conduct was signed in 1997 but the SSDC worked with the ILO in delivering a training project in Turkey in 2004 and are exploring the possibility of non-EU countries becoming signatories to the code and transposing it into collective agreements. In footwear we see another example where an existing commitment is revived and developed through working with external organisations (in this case Social Accountability International) to organise awareness-raising, training and capacity-building across the EU-25.

Training and lifelong learning

Restructuring of industry, new techniques and technologies, and the opening of global markets make training imperative if Europe is to continue to compete in new global markets. Equally, training and lifelong learning are central to opening up opportunities for young people and disadvantaged sectors of the workforce, so that they can benefit from good employment prospects and their own personal development. Training also helps to disseminate best practice and encourage innovation so it is easy to understand why developments in this field have been characteristic of so many SSDCs. For example, the electricity SSDC carried out a study in 2002 to identify the future skill needs of their sector and this was followed by a joint statement on lifelong learning in 2003. In 2004, a declaration was adopted encouraging member organisations to develop training plans and increase apprenticeships at all levels. In construction, there has been an important focus on the training of young people, to encourage them to enter and remain within the sector. In 2003, the social partners issued a training package aimed at integrating young people through the utilisation of the skills of older employees as tutors. In the chemical sector, a joint declaration adopted in 2005 noted the need to invest in vocational skills and a working group was set up to analyse the situation. In the retail trade (commerce sector), a project has been designed which develops practical training schemes and certifies qualifications in areas such as cash point service and marketing. In 2002 the agricultural social partners signed a European agreement on vocational training proposing a number of initiatives concerning the organisation of vocational training, skills assessment, validation and transparency. This agreement has so far led to negotiations in seven Member States and structured partnerships in several others.

Equal opportunities

Equal opportunities policies have been at the foundation of the European project and remain a live issue and, as progress on gender equality still needs to continue, action is needed in other areas to embrace diversity. This is particularly important as the EU enlarges to include people from new countries and as individuals cross borders to work. Examples of initiatives and actions in this area include guidelines on eliminating workplace harassment and bullying agreed in 2004 in the sea transport sector. In commerce, in the same year, social partners adopted a statement calling on member organisations to establish a disability management strategy to ensure the integration and support of disabled workers. This followed statements on combating racism in 2000 and good practice guidelines on age diversity in 2002. In the telecommunications sector, the social partners are carrying out a research programme and have published a report dealing with discrimination in areas of gender, ethnicity, age, disability, sexual orientation and religion/belief. In 2005, an audit of company practice was completed and the SSDC is currently developing a project to disseminate details of good practice.

Health and safety

The protection of the health and safety of employees has long been Community practice, through the setting of standards and the implementation of Directives, which have involved the consultation of workers' representatives in delivering successful outcomes. SSDCs have been concerned that general policies are shaped to the needs of their particular industries, so that specific areas of risk can be managed most effectively. This has led to action such as the 2004 joint declaration in agriculture on how to reduce accidents at work and occupational diseases. Further action was taken in 2005 with a view to reaching agreement on guidelines to prevent musculo-skeletal disorders. In the contrasting sector of personal services, health and safety has also been an important area for action, as the social partners implement the 'Cinderella project', to reduce the occupational risks in hairdressing, and develop improved ergonomic furniture and tools. The SSDC is also studying the feasibility of website publication of health and safety information.

Sector initiatives

Each of the different sectors has particular areas of action that are specific to themselves and SSDCs might take initiatives and actions that respond to those demands. So, for example, we find that in civil aviation, the SSDC is addressing the issue of the 'SINGLE EUROPEAN SKY' and air traffic management.

In local and regional government, the social partners called on affiliated member organisations to implement across industry agreement on telework.

In chemicals, the social partners are dealing with the European chemical policy review (REACH) and issued a joint position in 2004 and an update in 2005.

TECHNICAL NOTE

The tables included under each sector list the joint texts adopted by the social partners since 2003, when the publication 'The Sectoral Social Dialogue in Europe' was issued[2]. These joint texts can be found in the Social Dialogue section on the Europa website[3].

The following references are made in the SSDC summaries.

The NACE classification is taken as the most appropriate for the sector.

Employment statistics are taken, as far as possible, from the most recent (usually 2004) Labour Force surveys. Both set of data have been compiled with the help of Eurostat.

The representativeness of employers' and workers' organisations is established on the basis of regular studies[4]. The organisations participating in SSDCs are the most representative bodies of organisations that are able to negotiate agreements at local, national or European levels.

2 ISBN 92-894-5315-X, available at http://europa.eu.int/comm/employment_social/publications/2003/ke4702397_en.pdf.
3 http://europa.eu.int/comm/employment_social/social_dialogue/.
4 Available studies can be found at http://www.trav.ucl.ac.be/recherche/dg5.html.

Agriculture

PART 1. INDUSTRY AND EMPLOYMENT

1.1 Sector classification

The NACE classification 01 most closely covers the sector and includes the growing of crops, market gardening, horticulture farming of animals, hunting and related services.

1.2 Employment and Enterprise

In the EU-25 (2004) 9 million people work in agriculture. The majority of them are self-employed (55.9%) or family workers (16.3%), whilst 27.8% have employee status with full-time work dominating (80.5%). Women make up 36% of the total agriculture workforce and account for 31% of working time. 93.4% of the workforce has a low or intermediate education level. The majority of enterprises are small-scale.

1.3 Challenges and perspectives

The agricultural sector accounts for 14.2% of total EU manufacturing output, with EUR 675 billion worth of production. The 2004 enlargement meant an increase of 30% of agricultural land, while production expanded by about 15% for most products. In order to be more market-oriented and more sustainable, the CAP (Common Agricultural Policy) has been in a process of ongoing reform since the early 1990s. This has focused mainly on increasing the competitiveness of agriculture by reducing support prices and compensating farmers through the introduction of direct aid payments. Trade liberalisation discussions in the framework of the WTO's Doha Development Agenda have a direct impact on this sector and further restructuring is expected, including a reduction in aid and an opening up of world markets.

PART 2. THE SOCIAL PARTNERS OF THE AGRICULTURE SECTOR

The social partners in agriculture played a pioneering role in the development of sectoral social dialogue. The first joint commission was set up in 1974. The agriculture sectoral social dialogue committee was created in 1999 when the rules of procedures were adopted.

2.1 Workers' representatives

- The **European Federation of Food, Agriculture and Tourism Workers (EFFAT)** represents 128 national trade unions from 37 European countries having more than 2 600 000 members. EFFAT is a member of the European Trade Union Confederation, (ETUC), and is a regional organisation of the IUF (International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations).

2.2 Employers' representatives

- Employers' Group of Agricultural Organisations in the European Union/Confederation of Agricultural Organisations in the European Union (GEOPA/COPA) represents 53 organisations from the EU-25, Bulgaria, Romania, and Turkey as well as from Iceland, Norway and Switzerland.

PART 3. RECENT OUTCOMES OF THE AGRICULTURE SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	European agreement on the reduction of workers' exposure to the risk of work-related musculo-skeletal disorders in agriculture	Joint Declaration on health and safety	
2004	Health and Safety in Agriculture – Best practices and Proposals for Action		
2002		European agreement on vocational training in agriculture	

3.1 Health and safety

EFFAT and GEOPA-COPA adopted a joint declaration in 2004 on how to reduce work accidents and occupational diseases. In particular, two lines of action were proposed, related to the collection of statistics and the development and dissemination of measures at national level. Further action was taken in 2005 with a view to reaching agreement on guidelines for a prevention policy in relation to musculo-skeletal disorders.

Previous joint texts have concerned safety of employees when using tractors, handling chemical products or carrying out forestry work, such as the instructions for spray operators and the safety manual for forestry work, both published in 2001.

3.2 Restructuring and enlargement

The social partners have held three conferences since 2000 focussing on restructuring and the development of the social dialogue following enlargement. The conferences highlighted the factors leading to restructuring in their sector, i.e. technological progress, changes in consumer demand, modernisation of the CAP and trade liberalisation. A commitment was made to pursue work on issues such as vocational training, workers mobility and the improvement of the health and safety conditions of agriculture workers.

3.3 Training and lifelong learning

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

3.4 Working time

With regard to the organisation of working time, three agreements were signed in 1978, 1980 and 1997. The 1997 agreement supplements the 1993 Directive on this issue, and recommends affiliates to conclude collective agreements laying down a maximum annual working time of 1 827 hours or fewer.

3.5 Current work programme

In addition to the ongoing negotiations on musculo-skeletal disorders and the activities linked to the agreement on vocational training, the social partners are currently discussing a training model for drivers of agricultural vehicles, as well as the possibilities of setting up an observatory of vocational hazards in the sector, and the organisation of a European Year for accident prevention. They are also looking at seasonal work and the shadow economy.

Audiovisual

PART 1. INDUSTRY AND EMPLOYMENT

1.1 Sector classification

The NACE classifications 22 and 92 most closely cover the sector and include publishing, the reproduction of recorded media, recreational, cultural and sporting activities, motion pictures and video, radio and television as well as the activities of news agencies.

1.2 Employment and enterprise

In the EU-25[1] (2004), 1.2 million people were estimated to work in the audiovisual sector. 46% of them were women, 82% had employee status and 75% were full-time. 42% of the workforce had a high education level.

In 2000, the audiovisual sector in the EU embraced 13 600 TV and radio enterprises, 3 657 musical production enterprises and 40 100 entities in the film production and video subsector, although there is some domination by conglomerate organisations.

1.3 Challenges and perspectives

The progressive liberalisation of the audiovisual industries has lead to an increasing division of labour across the value chain, particularly in the television subsector. A similar process has occurred within the field of radio broadcasting, with the growth of independent radio production companies and service providers. The initial expansion of the audiovisual sector has been followed by a process of rationalisation, with the domination in many countries of a handful of large players.

So far, the GATS agreement has allowed the EU to preserve the 'cultural exception', by allowing transmission quotas and subsidy systems geared towards achieving structural change.

PART 2. THE SOCIAL PARTNERS OF THE AUDIOVISUAL SECTOR

The audiovisual social dialogue committee was created in 2004, when the rules of procedure were also adopted.

2.1 Workers' representatives

- The **Media and Entertainment International-Technical Professions of the Entertainment Sector (EURO-MEI)** is part of Union Network International (UNI), which represents over 130 trade unions, with a total membership of 250 000 workers and 14 service sectors.

- The **European Federation of Artists and Actors (EuroFIA)** represents trade unions in the EU-25 Member States (with the exception of Lithuania and Malta) as well as in EFTA countries. It is part of the International Federation of Artists and Actors (FIA), which represents more than 100 unions, guilds and associations, in more than 75 countries.

- The **International Federation of Musicians (FIM)** represents 24 member organisations in the EU-25, and 72 throughout the world and has close working relations within the framework of the International Arts Entertainment Alliance (IAEA).

- The **European Federation of Journalists (EFJ)** represents 37 organisations in the EU-25 and is part of the International Federation of Journalists (IFJ), which represents around 280 000 journalists in over 30 countries.

In the audiovisual sector, the four organisations represent jointly around 326 000 workers in the EU-25 and UNI-MEI acts as the employees' secretariat.

1 The 2004 LFS data are lacking for BE, CY, DK, EL, FI, IE, LV, SE, SI and the UK.

2.2 Employers' representatives

- The **European Union of Broadcasters (EBU)** has 72 members in 52 countries.

- The **European Co-ordination of Independent Producers (CEPI)** represents the interests of independent cinema and television producers in Europe, covering approximately 4 000 cinema and television producers.

- The **Association of Commercial Television (ACT)** represents the interests of the commercial (private) television sector with 22 member companies active in 19 European countries.

- The **Association of European Radios (AER)** represents the interests of over 4 500 private/commercial radio stations in 11 EU Member States, Switzerland and Romania.

- The **International Federation of Film Producers Association (FIAPF)** has member associations in each of the EU-25 Member States.

The five organisations together represent the interests of about 12 325 audiovisual enterprises in the EU-25. EBU acts as the employers' secretariat.

PART 3. RECENT OUTCOMES OF THE AUDIOVISUAL SECTORAL SOCIAL DIALOGUE

The audiovisual sectoral social dialogue committee has only recently been established. So far, it has focused on enlargement and how to improve social dialogue in the new Member States; health and safety at work; training as a tool for change; equal opportunities and diversity, as well as following up EU draft legislation and policies (such as the revision of the working-time Directive and the proposal for a Directive on services in the internal market).

Banking

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 65 most closely covers the sector and includes banks and other credit institutions other than insurance and pension funds.

1.2 Employment and enterprise

In the EU-25 (2004), 3.6 million people worked in the banking sector, in more than 6 000 credit institutions[1]. 97% of the workers have employee status and full-time work is predominant (86%). Women account for just over half of the total employed in banking (51%). 38% of the workforce has a high education level.

1.3 Challenges and perspectives

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

Achieving an integrated market for banks and financial companies is a core component of the European policy in the area of financial services. The financial services action plan, adopted in 1999, lays out EU regulation policies and is based on the principles of mutual recognition that allows financial services operators legally established in one Member State, to establish and provide their services in other Member States without further authorisation.

PART 2. THE SOCIAL PARTNERS OF THE BANKING SECTOR

An informal working party was set up in 1990 and the sectoral social dialogue committee was established in 1999, when the rules of procedure were adopted.

2.1 Workers' representatives

- **UNI-Europa, is part of Union Network International (UNI)**, which represents around 1 000 trade unions in 140 countries. It is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including the finance sector, for which it has a specific section. The number of affiliated workers in the banking sector is about 800 000.

2.2 Employers' representatives

- The **European Banking Federation (FBE)** represents the interests of the European banking sector and has members in all Member States except in Lithuania as well as Iceland, Norway and Switzerland. Its members are estimated to employ over 2.3 million people.

- The **European Saving Bank Group (ESBG)** represents the interests of savings and retail banks in the Member States, except in Belgium, Cyprus, Estonia, Ireland, Lithuania and Slovenia. ESBG also has members in Bulgaria, Norway and Romania, and a Russian member as observer. ESBG's members employ 691 000 people.

1 2002 Eurostat business statistics are lacking for DE, HU, IE, LU, LV, MT and SK.

All members of ESBG are members of the World Savings Banks' Institute.

- The **European Association of Co-operative Banks (EACB)** has a membership base comprising co-operative banking groups from the Member States (except the Czech Republic, Estonia, Latvia, Malta, Slovakia and Slovenia) as well as Bulgaria, Romania and Switzerland. EACB's members represent an estimated 547 000 employees.

PART 3. RECENT OUTCOMES OF THE BANKING SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Joint Statement on 'Employment and social affairs in the European banking sector: some aspects related to CSR'		
2003		Joint declaration on lifelong learning in the banking sector	

3.1 Corporate Social Responsibility

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

3.2 Integrating organisations from the new Member States and the candidate countries

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

A follow-up project is currently being carried out that will bring together the social partners from Slovakia, the Czech Republic and Hungary with their counterparts from another Member State in twinning meetings.

3.3 Training and lifelong learning

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

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

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

3.4 Current work programme

The topics of demography, enlargement and the follow-up of the CSR statement will be dealt with in the near future within the banking committee.

Chemical industry

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classifications 24 and 25 most closely cover the sector and include petrochemicals and plastics, specialty and fine chemicals, consumer and other chemicals.

1.2 Employment and enterprise

In the EU-25 (2004) 3.9 million people worked in the chemical industry. 97% of chemical workers have an employee status and full-time work is predominant (93%). 33% of workers are women. 24% of the workforce has a high education level. The total number of undertakings in the EU-25 chemical industry is 31 000, 86% of which have 1 to 49 employees; 12% have 50-499 employees and 2% 500 or more employees.

1.3 Challenges and perspectives

The EU is the leading chemical-producing area of the world, representing 28% of world production. The chemical industry is a high-tech industry underpinning numerous innovations and closely linked to new developments such as bio- and nanotechnology.

The challenges facing the industry include slow demand growth in Europe, high demand growth in Asia, relocation, higher production costs and a highly regulated environment. The main regulatory challenge for the sector is the implementation of a workable and cost-effective REACH system (Registration, Evaluation and Authorisation of Chemical substances). If adopted, REACH would represent a unified regulatory regime that should invigorate the international competitiveness and innovative capacity of the sector (notably of its SMEs), and improve the sector's performance as regards the environment and health and safety.

PART 2. THE SOCIAL PARTNERS OF THE CHEMICAL SECTOR

Following informal arrangements, the chemical sectoral social dialogue committee was formally set up in 2004 when the rules of procedure were also adopted.

2.1 Workers' representatives

- The **European Mine, Chemical and Energy Workers' Union (EMCEF)** represents 128 European trade unions in 35 countries, with more than 2.5 million members. It is a member of the European Trade Union Confederation (ETUC) and is part of the International Federation of Chemical, Energy, Mine and General Workers' Unions (ICEM).

2.2 Employers' representatives

- The **European Chemical Employers' Group (ECEG)** represents employers organisations from Austria, Belgium, Denmark, Finland, Germany, Italy, Norway, Portugal, Spain, Sweden, the United Kingdom, Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia. ECEG works closely with the European Chemical Industry Council (CEFIC). The member organisations of ECEG represent companies that employ about 90% of the workers in the industry.

PART 3. RECENT OUTCOMES OF THE CHEMICAL SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Joint position on REACH		
2004	Joint Position on REACH		
	Joint Declaration on the establishment of a formalised Sector Dialogue Committee for the European Chemical Industry		
	Joint Position on Education, Vocational Training and Lifelong Learning		
2003	Joint statement on the New European Chemicals Policy (REACH)		
	Memorandum of Understanding on Responsible Care		

3.1 Corporate Social Responsibility

In February 2003, EMCEF and ECEG (together with CEFIC) adopted a Memorandum of Understanding on responsible care, aiming at improving and promoting the safety, health and environmental performance of the industry. The chemical social partners decided to set up a joint monitoring group to review improvements in safety, health and environmental performance, share best practice and develop education and training.

3.2 Economic and sectoral policies

The social partners are currently dealing with the European chemical policy review (REACH) as well as health and safety management in chemical and downstream user industries.

3.3 Training and lifelong learning

In 2005, ECEG and EMCEF adopted a joint declaration that underlined the lack of skills facing the chemical industry and stated the mutual interest of employers and employees in investing in them. A working group was set up to develop an in-depth analysis of the situation relating to skills, qualifications, vocational training and lifelong learning and to exchange good practice.

3.4 Current work programme

The social partners are following-up on their previous initiatives relating to training, health and safety and responsible care. They are also discussing actions with regard to social dialogue in the new Member States and the candidate countries.

Civil aviation

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The sector comprises scheduled and non-scheduled air transport (NACE classifications 62.1 and 62.2), the ground-handling market and air traffic management.

1.2 Employment and enterprise

In the EU-25 (2003), airline companies employed around 342 000 people. 89.7% of these workers have an employee status and full-time work is predominant (94.5%). 39.2% of workers are women. 66.4% of the workforce has a low or intermediate education level.

1.3 Challenges and perspectives

Following the major crisis that hit the industry in the early 1990s, efforts to restructure and deregulate the European market have enabled airlines to operate successfully again. After a limited recovery in 2002, the European airline industry faced a new set of challenges when the SARS global health crisis and Iraq war dampened demand in the early part of 2003. Full service and charter airlines faced increasingly widespread competition from the expanding low-cost sector. Nevertheless, overall European traffic increased in 2003 but growth in air travel is exacerbating problems of saturation levels at airports and the overloaded air traffic control system.

PART 2. THE SOCIAL PARTNERS OF THE CIVIL AVIATION SECTOR

A joint civil aviation committee was established in 1990. The civil aviation social dialogue committee was established in 2000 and the internal rules of procedure were adopted in 2003.

2.1 Workers' representatives

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

2.2 Employers' representatives

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

European organisations representing the low-cost carriers and the independent ground handlers may request to be recognised as social partners and to join the committee.

PART 3. RECENT OUTCOMES OF THE CIVIL AVIATION SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	ETF/CANSO, Statement on the Community Air Traffic Controller Licence draft Directive		
	ETF/ACI Europe, Joint Statement on Quality, Safety and Training in the ground-handling sector		
2004	ETF/CANSO, Joint Statement 'Social partners: key players in the functional airspace blocks'		
2003	ETF, ECA /ACI, AEA ERA, IACA, CANSO, Rules of procedures		
	ETF/CANSO Letter to the Commission – Single European Sky		

3.1 Economic and sectoral policies

In 2001, the social partners adopted a joint opinion on the crisis in air transport following September 11th. They called upon the Councils of Transport and Finance Ministers to approve measures to provide assistance to the aviation sector to address both economic and social factors affecting the future of the industry. The social partners represented in the air traffic management (ATM) working group, CANSO and ETF, jointly organised a conference on functional airspace blocks in 2004 to exchange views on the 'bottom-up approach' to the development of the Single European Sky. A joint statement, adopted at the conference, announced the development of an action plan addressing operational and technical issues, human resources and economic and financial issues.

3.2 Training and lifelong learning

The working group on ground-handling has discussed training and qualification issues and in 2005 ACI Europe and ETF agreed a joint statement on quality, safety and training in the ground-handling sector. However, the other organisations participating in the working group (AEA, ERA, and IACA) have not adopted the statement and this difference of opinion should be seen in the context of the revision of the current ground-handling Directive.

3.3 Working time

In 2000, AEA, ERA, IACA, ECA and ETF concluded an agreement on the working time of mobile workers in civil aviation and this sectoral agreement was transformed into EU legislation by a Council decision.

3.4 Current work programme

In the field of air traffic management, the working group is following up its conference with a view to presenting joint conclusions. The civil aviation social partners are also monitoring a study on the social impact of the Single European Sky and are closely monitoring the adoption of the Community Air Traffic Controller Licence proposal.

The ground-handling working group intends to address training and qualification issues, in particular by gathering examples of best practice in the field.

The newly created air crew working group decided to launch a survey and analysis of the scope and contents of existing legal rules governing cabin crew licensing, recruitment and vocational training in the EU-25. They are also addressing issues such as privacy and personal data protection, workplace health promotion and mobile staff in consolidation processes. All seven organisations together have launched a debate on the future of the industry.

Cleaning industry

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 74.7 most closely covers the sector and includes services provided by specialised contractors, building maintenance and associated cleaning, cleaning of trains, buses and planes, waste management services and disinfecting and exterminating activities.

1.2 Employment and enterprise

In the EU-25 (2002), the cleaning industry comprised nearly 100 000 undertakings employing 2.7 million people. 92% of workers have an employee status although there is a high prevalence of undeclared work in domestic cleaning for private households and part-time work is common (51%). 72% of workers in the cleaning industry are female. 93% of the workforce has a low or intermediate education level.

1.3 Challenges and perspectives

The contract cleaning industry has grown steadily over the past 15 years as a direct consequence of outsourcing. This growth is particularly important in the new Member States and, although national situations are often different, the sector is facing common challenges and opportunities. Markets are developing towards more global service delivery, which goes beyond simple cleaning and towards, for example, facilities management and support services. However, companies are confronted with difficulties in recruiting, particularly because the working hours of employees in the sector are often divided between two limited time periods (early morning and late afternoon/early evening) which generally leads to activities being carried out alone or in small groups, involving some risks for the workers. However, there are real opportunities for development and diversification.

PART 2. THE SOCIAL PARTNERS OF THE CLEANING INDUSTRY SECTORAL SOCIAL DIALOGUE COMMITTEE

The social partners have been working together in an informal working party since 1992. The sectoral social dialogue committee for the cleaning industry adopted its internal rules of procedure in 1998 and it has been active since the following year.

2.1 Workers' representatives

- **UNI-Europa, is a part of UNI (Union Network International)** which represents around 1 000 trade unions in 140 countries. It is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including the cleaning industry where it has a property services section.

2.2 Employers' representatives

- **European Federation of Cleaning Industries (EFCI)** represents the employers' side and its members are national trade associations in the EU-25 and Norway. EFCI has no members in Cyprus, Estonia, Greece, Latvia, Lithuania and Malta.

PART 3. RECENT OUTCOMES OF THE CLEANING INDUSTRY SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	European Initiative for Youth – Letter to President Barroso		
2004	Joint declaration: Selecting best value for the public procurement of cleaning services	Common recommendations of the European social partners for the cleaning industry	
	Framework programme of the social dialogue committee in the cleaning industry		

3.1 Employment and undeclared work

In 1996, a joint opinion on new sources of employment was signed, which asked public authorities to discourage the use of clandestine labour for cleaning services for private individuals which could account for two million jobs. In 1998, the social partners issued a declaration on undeclared work in order to detect the problems, to try and solve them by introducing the necessary controls and to record the progress achieved in the fight against undeclared work. They sought to raise awareness of the problem and its implication for the awarding of public contracts at low rates and the consequent challenge to social legislation and collective agreements leading to decline in quality and customer satisfaction.

3.2 Public procurement

In order to promote the selection of best value, rather than the lowest price in calls for tenders, a handbook was published in 2001 for organisations awarding such contracts. In 2004, this manual was promoted during conferences organised in Belgium, Finland, France, Italy, the Netherlands, Spain, Sweden and the UK.

3.3 Integrating organisations from the new Member States and the candidate countries

In 2001 a joint declaration on enlargement was adopted, which committed support to new EU countries. The social partners committed to support in these countries through actions including the setting-up of employers' and employees' independent representative organisations which would recognise each other at all levels; the development between them of a well-articulated social dialogue and the creation of closer links between those social partners, EFCI and UNI-Europa. In the same text, EFCI and UNI-Europa also encouraged cleaning companies that created subsidiaries in the new Member States and the candidate countries to offer good working conditions to their employees.

3.4 Training and lifelong learning

In 1994, a report entitled 'forecasts for the evolution of qualifications and training in the industrial cleaning sector' was published. In 1995, guidelines on vocational training were adopted which underlined the commitment to increase professionalism through creating the conditions for developing vocational training.

In 2000, a guide concerning domestic cleaning services containing tools for setting up training programmes was issued and, in the same year, a European training manual on health and safety was published. In 2001, a training kit of basic office cleaning techniques was released.

3.5 Working conditions

In 2004 the social partners acknowledged their recruitment difficulties particularly among young people and agreed to work towards modernisation of employment relations in order to increase the attractiveness of the sector. In particular, they committed to the promotion of full-time and day work. They also sought to tackle the ongoing problems of discrimination and social integration that can be particularly prevalent in the industry.

3.6 Current work programme

The cleaning industry social partners are currently working on the anticipation and management of change, the integration of young people, the development of vocational training, the prevention of occupational risks, the increased understanding of national systems as well as the development and recognition of the profession.

Commerce

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

NACE classifications 50, 51, and 52 most closely cover the sector and include wholesale, retail and commission trade including the motor trade.

1.2 Employment and enterprise

In the EU-25 (2004) 28.23 million people worked in the commerce sector. 77% of commercial workers have an employee status and part-time work accounts for 22%. 48% of the workforce is female. 85% of the workforce has a low or intermediate education level.

In 2002, the sector comprised 5.49 million enterprises in the EU-25. 93.7% of the EU-25 commerce enterprises are micro enterprises, comprising less than 10 workers. The average number of persons employed per enterprise is 4.8 but there is a decrease in the share of employment represented by the SMEs.

1.3 Challenges and perspectives

Increased internationalisation, as well as deregulation in different countries on issues such as opening hours and establishment size, has increased competitive pressures in the commerce sector. With the transition to market economies, Central and Eastern European countries have attracted increased Foreign Direct Investment inflows, including large commercial multinational corporations. This was accompanied by technological innovation, such as self-scanning and electronic commerce. New skilled jobs are expected to be created in database management and marketing and traditional jobs are expected to be redefined. The geographical location of work, working-time occupational and pay structures are likely to undergo a transformation in the sector. However, there is scope for employment creation in the sector. Employment in the commerce sector is 9% of the working-age population in the EU-25.

PART 2. THE SOCIAL PARTNERS OF THE COMMERCE SECTOR

The social partners have been working together in an informal working party since 1985 and the internal rules of procedure were adopted in 1998.

2.1 Workers' representatives

- **UNI-Europa, is a part of UNI (Union Network International)** which represents around 1 000 trade unions in 140 countries and is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including commerce for which it has a specific section. UNI-Europa Commerce has at least one member in each EU-25 country involved in collective bargaining for commerce.

2.2 Employers' representatives

- **EuroCommerce** represents the employers' side within the committee. It has a membership of over 100 organisations including commerce federations in 28 European countries, European and national associations representing specific branches of commerce and individual companies. EuroCommerce represents a large number of SMEs, but some corporate multinationals are also directly affiliated. With the exception of Lithuania, EuroCommerce has at least one member in each country of the EU-25.

PART 3. RECENT OUTCOMES OF THE COMMERCE SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Joint statement on the draft Directive on services in the internal market		
2004		Statement on promoting employment and integration of disabled people	
2003		Joint statement on Corporate Social Responsibility	

3.1 Ageing workforce

In 2002 voluntary guidelines on age diversity were adopted. This developed good practice in order to reach the Lisbon target of a 50% employment rate for the EU population aged between 55-64 years. The guidelines recognise that the social partners have a special role to play in finding new forms of work and training to facilitate the continuous integration of mature workers.

3.2 Corporate Social Responsibility

The joint statement on Corporate Social Responsibility responds to the challenge of promoting high standards throughout business activities, to raise awareness about CSR among European enterprises and their workers, to develop social dialogue at European, national and company levels on issues relating to CSR and to disseminate good practice on CSR.

3.3 Disability

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

3.4 Integrating organisations from the new Member States and the candidate countries

The social partners in commerce have debated important questions relating to enlargement during a series of round tables in Estonia (1998), Hungary (1998), the Czech Republic (1999), Poland (1999), Lithuania and Slovakia (2000), Latvia (2002) and Slovenia (2002). Round tables are continuing in Bulgaria, Romania and Turkey.

3.5 Racism

A joint statement on combating racism and xenophobia was issued in 2000. It emphasised that any discrimination on the grounds of race, ethnic or national origin, religion or any other comparable reason is in contravention of the fundamental principles of human rights. They recommended that the problems of racism and xenophobia be included in all applicable training programmes, to create a broad awareness of the necessity for all commerce employers and employees to address the issue in their daily activities.

3.6 Telework

In 2001, the social partners adopted guidelines on telework, which indicated that it should be designed so that it is favourable both for the company and the employee. Furthermore, an employee who is doing telework should be employed on a similar basis to any other employees including comparable employment rights, remuneration structures and career opportunities. Measures should be taken to ensure that social contact with the workplace and other workers is not lost. As a rule, the company should be responsible for all necessary equipment and for its installation. Participation in trade union activities should be permitted.

3.7 Training and lifelong learning

Since 2004, UNI-Europa Commerce and EuroCommerce have joined the BE-QUA-WE project (Berufsbildende Qualifizierung für den Wertschöpfungsprozess des Handels in Europa). The project designs practical training schemes for vocational schools and certifies qualification modules for the retail trade.

3.8 Working conditions

In 1995, the social partners issued a statement on combating violence in commerce through the identification of the risk, its reduction and dealing with after-effects.

In 1999 the social partners adopted proposals on fundamental principles and rights at work promoting respect for the fundamental principles of human rights, notably as embodied in the International Labour Organisation (ILO) Declaration. They committed to avoid dealing with products that are manufactured in violation of these core labour standards.

3.9 Current work programme

The commerce sectoral social dialogue committee is currently examining issues such as the promotion of gender equality and the integration of young people in the commerce labour market. The commerce social partners intend to collect and disseminate data on violence at the workplace as well as on prevention schemes, staff training and awareness-raising measures. National round tables and a European conference will be organised.

Construction

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 45 most closely covers the sector, and includes all forms of building and civil engineering activities and the renting of construction or demolition equipment with operators.

1.2 Employment and enterprise

In the EU-25 (2004) the construction sector employed 15 million people. 74.4% of construction workers have an employee status and full-time work predominates (94.5%). 91.77% of workers are men. 87.8% of the workforce has a low or intermediate education level. There is a high prevalence of undeclared work in the construction sector.

The sector is composed of more than 2.2 million enterprises and 93% of them comprise less than 10 people. The few large companies are, in a number of cases, parts of mixed activity organisations providing services, including the financing of construction activities, or are active in fields such as energy, transport, telecommunication and media.

1.3 Challenges and perspectives

Construction is a labour-intensive sector and the value-added per person employed is significantly lower than in many other activities, mostly due to the limited potential for increased automation and capital intensity of production.

Fluctuation of demand has an important influence on the performance of construction and this is influenced by the business cycle and country-specific support measures such as subsidies, credit or tax incentives for homeowners.

The globalisation of construction activities is especially important for large civil engineering companies that are exporting management and planning concepts and accordingly, managerial and engineering skills. However, the manual labour is generally performed by the local workforce.

Consolidation is expected among the large construction companies, which would lead to the emergence of a few firms dealing with project management that might outsource building work to subcontractors (small or micro enterprises).

PART 2. THE SOCIAL PARTNERS OF THE CONSTRUCTION SECTOR

The social partners have been working together in an informal working group since 1992 and in the sectoral dialogue committee for construction since 1999.

2.1 Workers' representatives

- The **European Federation of Building and Woodworkers (EFBWW)** represents 50 affiliated trade unions in the EU-25 with 2 300 000 members. It has no members in Cyprus, Estonia, Greece, Lithuania and Malta. EFBWW is a member organisation of the European Trade Union Confederation (ETUC).

2.2 Employers' organisation

- **European Construction Industry Federation (FIEC)** represents the employers' side within the construction sectoral social dialogue committee. FIEC has member organisations in every EU-25 Member States, except in Latvia, Lithuania and Malta. It also has member organisations in Bulgaria, Norway, Romania, Switzerland and Turkey.

- The **European Builders Confederation (EBC)** represents small and medium-sized construction enterprises and has members in Belgium, the Czech Republic, France, Hungary, Italy, Luxembourg, Slovenia, Spain, the UK and Romania.

PART 3. RECENT OUTCOMES OF THE CONSTRUCTION SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Third joint statement of the European Construction Industry's Social Partners on the European Commission's Proposal for a Directive on Services in the Internal Market (COM(2004) 002		
	Joint statement on young people		
2004	Joint Declaration on the occasion of the European Health & Safety Summit		
	Second joint statement on the European Commission's proposal for a Directive on services in the internal market		
	Joint statement on the European week for Safety and health at work 2004 'building in safety'		
	02/04: Joint statement on the European Commission's proposal for a Directive on services in the internal market		
2003	Brochure on tutorship		
	Joint declaration regarding the proposed Directive relating to entry and residence conditions for workers who are national of other countries		
	Recommendations regarding implementation of Directive on 'working at heights'		
	01/04: Guide of best practices on the co-ordination of health and safety		

3.1 Employment

The free movement of people within the EU has an important impact on this sector. In 2004, a conference was held that was dedicated to an analysis of the implementation of the EU Posted Workers Directive in ten countries, and in 2005 a common database was launched.

3.2 Health and safety

In 2002 a technical guide on health and safety for the use of small and medium-sized undertakings was published. It aimed to make all players in the sector aware of the basic rules to follow on construction sites. This was followed in 2004 by a joint declaration insisting on the need for health and safety training.

In 2003 recommendations were adopted regarding the implementation of the Directive on 'working at heights'. The recommendations concern the skills required by the 'competent person', and can be used by the members of FIEC and EFBWW to assist governments in transposing and implementing the Directive on a uniform basis.

3.3 Integrating organisations from the new Member States and the candidate countries

Initiatives were developed in order to promote social dialogue in the new Member States and the candidate countries and a conference and further round table were held in 2002.

3.4 Training and lifelong learning

In 2003 a brochure on tutorship was issued, aimed at training and integrating young people in the sector on a long-term basis, through utilising the experience of older employees. The high number of young people leaving either during training, or after just a few years working in the sector, represents a serious waste of the resources invested in the various vocational training systems supported by the industry.

3.5 Young people

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

3.6 Current work programme

According to their work programme for 2004-2007, the construction social partners are currently developing the following themes: health and safety, occupational diseases and industrial accidents, work-related stress, the image of the sector, lifelong learning, undeclared work and enlargement. They are also closely monitoring the development of European legislation on waste management.

Electricity

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 40.1 most closely covers the sector and includes the production and distribution of electricity.

1.2 Employment and enterprise

The electricity sector in the EU-15 (2002) comprised approximately 3 200 companies employing 750 000 people in the production and distribution of electricity. 99% of the electricity workers have an employee status and full-time work is predominant (95%). 81% of workers are men. 73% of the workforce has a low or intermediate education level.

The size of enterprises varies widely between countries. One or a few large companies dominate in some, while in others smaller companies play a more significant role.

1.3 Challenges and perspectives

The restructuring which has occurred in the electricity sector is mainly a consequence of the EU liberalisation of network industries since the second half of the 1990s. The first steps towards this were taken through the adoption of a 1996 Directive, which came into effect in 1999, and further Directives that gave deadlines for the full opening up of the market by 2007. This key legislation contains a number of obligations for national regulators and they must monitor the development of competition, levels of investment and, where appropriate, the level of prices. This should lead to more transparency and give operators more ability to predict change. The electricity sector remains in transition in many European regions, particularly in countries in which the liberalisation process (and in some cases also the privatisation process) is still continuing.

PART 2. THE SOCIAL PARTNERS OF THE ELECTRICITY SECTOR

An informal working party was established in 1995 and the electricity sectoral dialogue committee was established in 2000, when it adopted its internal rules of procedure.

2.1 Workers' representatives

- The **European Mine, Chemical and Energy Workers' Union (EMCEF)** represents 128 European trade unions in 35 countries, with more than 2.5 million members. It organises both blue and white-collar workers. It is a member of the European Trade Union Confederation (ETUC) and is part of the International Federation of Chemical, Energy, Mine and General Workers' Unions (ICEM). EMCEF represents 300 000 trade union members in electricity.
- The **European Federation of Public Service Unions (EPSU)** represents over 216 public sector unions covering approximately 8 million workers in more than 36 EU and applicant countries as well as EFTA countries. EPSU represents 330 000 trade union members in electricity. EPSU is a member of the European Trade Union Confederation (ETUC).

2.2 Employers' representatives

- **EURELECTRIC** represents employers in the Electricity Industry and has members in all Member States, in the four candidate countries as well as in Iceland, Norway and Switzerland. EURELECTRIC represents electric companies employing 600 000 people.

PART 3. RECENT OUTCOMES OF THE ELECTRICITY SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2004	Joint statement: South East European Energy Community		
	Joint declaration on work-related stress		
	Joint statement on future skills needs		
2003	Joint statement and final report on the study on lifelong learning		
2003		Joint declaration on equal opportunities/diversity	

3.1 Anti-discrimination

In June 2003, policies were adopted on equal opportunities and diversity, where the social partners undertook to combat workplace discrimination on the basis of age, health, national or ethnic origin, sex, sexual preference, language, religion, opinion, family ties, trade union activity, political activity or any other comparable circumstance.

The social partners see diversity in the workforce as an asset to the business development of the sector and the fight against discrimination as a 'win-win' strategy to promote both equity and economic efficiency, and indicate a number of measures to be taken at sectoral and company levels.

3.2 Corporate Social Responsibility

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

3.3 Integrating organisations from the new Member States and the candidate countries

The necessity of involving the social partners in the processes of enlargement was underlined in a joint statement adopted during a 2002 conference on the social implications of the electricity sector restructuring in the candidate countries. In 2003, EMCEF, EPSU and EURELECTRIC set up three workshops in the candidate countries on the social implications of the internal electricity market.

3.4 Stress

In 2004, the social partners adopted a joint declaration on work-related stress, encouraging their affiliated member organisations to implement the cross-industry agreement on this issue.

3.5 Telework

In 2002 the social partners called upon their member organisations to implement the cross-industry agreement on telework.

3.6 Training and lifelong learning

In a declaration adopted in 2000 on the social implications of the internal electricity market, the social partners highlighted the importance of training, re-training and re-deploying of workers following restructuring. In 2002, the social partners carried out a study with the aim of identifying the future skill needs of the sector and adopted a declaration in 2004. This encouraged the development of training plans, increasing the number of apprenticeships and plans for monitoring and evaluating actions. In a joint statement on lifelong learning in 2003 the social partners recommended their members to explore all possible means to improve and establish further frameworks for training and lifelong learning at all levels.

3.7 Current work programme

The electricity social partners are currently examining the employment and social aspects of the South East Europe Energy Regulatory Process[1]. They are also dealing with issues concerning equality, diversity, training, health and safety as well as CSR.

1 The countries involved in the creation of the South East European Energy Community are Albania, Bosnia-Herzegovina, Bulgaria, Croatia, Kosovo, Macedonia, Serbia and Montenegro as well as Turkey. Other states are engaged in a supportive role such as Austria, Greece, Hungary, Italy and Slovenia. See http://europa.eu.int/comm/energy/electricity/south_east/index_en.htm.

Extractive industry

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classifications 10, 13 and 14 most closely cover the sector.

1.2 Employment and enterprise

In the EU-25 (2004), the extractive industry sector covers 19 000 enterprises employing 613 000 workers. 97% of them have an employee status with full-time work predominating (98%). 89% of workers are men. 90% of the workforce has a low or intermediate education level.

1.3 Challenges and perspectives

The extractive industry sector is located in many of the EU-25 countries, and in particular in Finland, France, Germany, Greece, Poland, Portugal, Slovakia, Spain, Sweden, the UK and Poland. Rationalisation measures and the reduction of activity in the extractive industry in most producing countries has led to a significant reduction in jobs. Competition is strong from large-scale, high-grade overseas operations capable of producing under low-cost conditions. The EU extractive industry tries to compete by supplying high-quality materials.

In 2000, the Commission adopted a Communication, setting out the broad policy lines for promoting sustainable development in the EU extractive industry and for reconciling the need for more secure and less polluting activities whilst maintaining competitiveness. The Commission stressed the need for an improvement in the environmental performance of the industry in general and for improved accident prevention.

PART 2. THE SOCIAL PARTNERS OF THE EXTRACTIVE INDUSTRY SECTOR

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

2.1 Workers' representatives

- The **European Mine, Chemical and Energy Workers' union (EMCEF)** represents 128 European trade unions in 35 countries with more than 2.5 million members. It is a member of the European Trade Union Confederation (ETUC) and is part of the International Federation of Chemical, Energy, Mine and General Workers Unions (ICEM).

2.2 Employers' representatives

- The **European Association for Coal and Lignite (EURACOAL)** represents the coal industries of Austria, Belgium, the Czech Republic, France, Germany, Greece, Hungary, Poland, Slovenia, Spain, the UK as well as Romania, Bulgaria, and Serbia/Montenegro.

- The **European Association of extractive industry Industries, Metal Ores and Industrial Minerals, (EUROMINES)** represents the European metals and minerals extractive industry in the EU. EUROMINES has members in Austria, the Czech Republic, Finland, France, Germany, Greece, Ireland, Slovakia, Sweden, the UK and Turkey.

- The **European Association of Potash Producers (APEP)** represents Cleveland Potash, Iberpotash and K+S who are active in the United Kingdom, Spain and Germany.

- The **European Industrial Minerals Association (IMA-Europe)** represents the interest of the industrial minerals industry and represents eight European associations specific to individual minerals. IMA-Europe's member organisations come from Austria, Belgium, Cyprus, the Czech Republic, Denmark, Finland, France, Germany, Greece, Italy, Luxemburg, the Netherlands, Portugal, Spain, Sweden, as well as from Norway, Switzerland, and Turkey.

PART 3. RECENT OUTCOMES OF THE EXTRACTIVE INDUSTRY SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Joint Statement 'Need for a European Mineral Resources Strategy'		
2004	Joint Declaration of the Social Dialogue for the extractive industry sector on general questions of health and safety in raw materials extraction		
	Joint opinion on position on training and lifelong learning		
	Joint opinion on the Anti-dumping proceedings of the European Commission		
2003	Joint opinion on the proposed Directive on the management of waste from the extractive industries		
	Declaration on training and lifelong learning		
	Joint statement on the preservation of the Safety and health commission for the extractive industry and other extractive industries		
	Joint opinion on the SCOEL recommendation for an occupational exposure limit for nitrogen monoxide (NO)		

3.1 Economic and sectoral policies

In 2002, the social partners signed a joint opinion on the social policy aspects of the new rules for aid to the coal industry in the EU. They signed two further joint opinions concerning draft European Directives on the management of waste from the extractive industries and on emissions trading. In 2003, they adopted a joint opinion on the recommendations from SCOEL (Scientific Committee on Occupational Exposure Limits) for an occupational exposure limit for nitrogen monoxide.

In 2004, the social partners organised a conference on the theme of information and consultation on the future of mines in Europe that dealt with good practice at a time of restructuring.

3.2 Health and safety

In November 2004, the sectoral social dialogue committee agreed on a joint declaration on general questions of health and safety in raw materials extraction and dealt with the link between health and safety training and prevention, as well as the role of employees and employee participation.

3.3 Integrating organisations from the new Member States and the candidate countries

In order to respond to the challenge of enlargement a conference was organised in 2003, with the aim of promoting sustainable development in European extractive industry industries. The social partners also organised conferences focusing on the situation in Poland (2004) and Romania (2005) and on the involvement of the social partners in the ongoing restructuring process.

3.4 Training and lifelong learning

The extractive industry social partners are concerned at the possible scarcity of suitable researchers, technicians and managers for the extractive industry in the EU by 2015. A module entitled 'European competence with international partners' has been devised, and in 2003 a joint opinion was adopted underlining the importance of vocational training and skills in a knowledge-based society.

3.5 Current work programme

Thirteen European social partners and industrial organisations in the sectors of glass, ceramics industry, aggregates, foundries, industrial minerals, raw materials, glass wool, mines, cement and concrete, have negotiated the first multi-sectorial agreement on protecting workers against the silica crystalline dusts. The aims of this agreement, which will be formally signed at the beginning of 2006, are:

(1) Health protection at the workplace

(2) Reduction of the exposure to silica crystalline through good practices.

(3) Better knowledge of silica crystalline effects and good practices

The agreement will be followed up by regular reports to ensure the implementation of good practices. In addition, a joint monitoring committee will draw up annual implementation reports. This agreement falls within the framework of the Community strategy on health and safety at work 2002-2006.

In addition, the sectoral social dialogue committee is currently debating issues dealing with working conditions for miners, health and safety, environmental protection, sustainable development and CSR.

Footwear

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 19.3 most closely covers the sector and includes footwear made from materials such as textiles, plastics, rubber or leather as well as specialised products such as snowboard boots and protective footwear.

1.2 Employment and enterprise

In the EU-25 (2004) footwear comprises 27 000 enterprises employing 335 000 people. 88% of the footwear workers have an employee status and full-time work predominates (96%). Women represent the majority of workers (53%). 95% of the workforce has a low or intermediate education level. The footwear sector is characterised by networks of micro and small enterprises and employment is concentrated in these, while companies of more than 500 people employ less than 15% of the workforce.

1.3 Challenges and perspectives

The footwear sector is undergoing restructuring due to the globalisation of markets, deregulation, trade liberalisation and technological change. The number of enterprises has decreased by more than 20% in the last ten years, and employment in the footwear industry has fallen steeply recently. For example, between 2001 and 2003, the sector lost about 10% of its workforce. Manufacturing is mainly located in the Czech Republic, Hungary, Italy, Slovakia, Spain, Poland and Portugal. As a labour intensive sector, the footwear industry faces competition from low labour cost countries. The EU sector was severely affected by the elimination of the quota system within the World Trade Organisation in January 2005 (which had applied for the previous four decades). The recent surge in imports is creating pressure for trade restrictions. Nevertheless, the competitive advantages of the EU lies in the high quality of production in technical, design and fashion-related terms and the development of highly demanded brands with a strong image.

PART 2. THE SOCIAL PARTNERS OF THE FOOTWEAR SECTOR

The footwear sector was one of the first industrial sectors to set up a European joint committee (1982), replaced and expanded in 1991 by an informal working group and since 1999 by a Sectoral Social Dialogue Committee.

2.1 Workers' representatives

- The **European Trade Union Federation: Textile, Clothing, Leather (ETUF:TCL)** represents 70 trade unions in 40 European countries and has at least one member in each Member State, with the exception of Luxembourg. ETUF:TCL represents more than 1.2 million workers and is a member organisation of the ETUC and of the International Textile, Garment and Leather Workers' Federation (ITGLWF).

2.2 Employers' representatives

- The **European Confederation of the Footwear Industry/Confédération Européénne de la Chaussure (CEC)** represents members in 17 of the Member States. It is not represented in Austria, the three Baltic States, Cyprus, Germany, Luxembourg and Malta, but has members in Norway, Ukraine, Russia, Morocco, Tunisia and Turkey.

PART 3. RECENT OUTCOMES OF THE FOOTWEAR SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2000		Code of conduct: A charter of the social partners in the footwear sector	
	Social action programme		
	Contribution of social partners to the Lisbon summit		

3.1 Economic and sectoral policies

Within the committee, the social partners monitor developments of trade policy issues with an economic and social impact on their sector (for example, market access of EU products in other countries, marking of origin and trade development since the end of the quota system) as well as industrial and social measures aimed at improving the competitiveness of the sector.

3.2 Integrating organisations from the new Member States and the candidate countries

CEC and ETUF:TCL are actively involved in the promotion of social dialogue in the new Member States and the candidate countries and organise, on a regular basis, joint social and economic fora with their members in these countries. The first forum took place in 2001 and the second was organised in Turkey in 2004. The objective of these events is to address the social and economic impact of enlargement on the sector and to enhance social dialogue in the new Member States and candidate countries.

3.3 Training and lifelong learning

In order to reduce the mismatch between labour supply and demand in the footwear sector, CEC and ETUF:TCL issued a study, in 1997, on changing needs in employment and training. Subsequently, the footwear social partners organised national round tables to raise awareness on the need to enhance quality, update business management methods and modernise work organisation.

Other projects have now developed, aimed at analysing needs and skills in the sector, developing new methodologies and specific training for SMEs.

3.4 Working conditions

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

3.5 Current work programme

The sectoral social dialogue committee is currently working on Corporate Social Responsibility, enlargement, trade developments, market access, marking of origin and the protection of intellectual property rights. They are also considering extending to their sector the public procurement guide developed in the textile and clothing sector.

Furniture

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 36.1 most closely covers the sector.

1.2 Employment and enterprise

In the EU-25 (2004) the furniture sector employs 1.3 million people. 82.6% of furniture workers have an employee status and full-time work is predominant (95%). 79% of workers are men. 89.6% of the workforce has a low or intermediate education level. In 2002, the furniture sector included around 138 000 companies which are mainly small and medium-sized enterprises.

1.3 Challenges and perspectives

Production of furniture is a labour-intensive activity and the possibilities of introducing automation into manufacturing are limited or already in place. The industry has developed a strategy focusing on improving co-operation with the new Member States and candidate countries' producers by transferring production of labour-intensive parts to the new Member States whilst maintaining the design, know-how, distribution and commercial aspects of business in the hands of EU-15 companies.

The strong quality competitiveness of the EU furniture sector is the main explanation for the relatively high level of exports maintained, despite the very significant disadvantage in labour costs relative to the major competitors. The EU furniture industry is a major player in the global market, accounting for almost 35 % of world exports. However, this position has been declining recently, under pressure from low labour cost competitors and, in recent years, the decrease in production has resulted in a drop in employment. For example, between 2001 and 2003, the industry lost between 35 000 – 40 000 jobs.

PART 2. THE SOCIAL PARTNERS OF THE FURNITURE SECTOR

UEA and EFBWW participate in the furniture sectoral social dialogue committee since 2001. The rules of procedure were adopted 12 March 2001.

2.1 Workers' representatives

- The **European Federation of Building and Woodworkers (EFBWW)** represents 50 affiliated trade unions in the EU-25 with 2 300 000 members. It has no members in Cyprus, Estonia, Greece, Lithuania and Malta. EFBWW is a member organisation of the European Trade Union Confederation (ETUC).

2.2 Employers' representatives

- The **European Furniture Manufacturers Federation (UEA)** has affiliates in all the Member States, except in Belgium, Denmark, Ireland, Greece, Luxembourg and Slovenia. UEA has also members in Bosnia-Herzegovina, Bulgaria, Norway, Romania, Russia and Switzerland.

PART 3. RECENT OUTCOMES OF THE FURNITURE SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2002	Joint declaration on enlargement		

3.1 Enlargement

In 2002, UEA and EFBWW adopted a joint declaration at a conference where they endeavoured to achieve effective co-operation with their counterparts in the candidate countries.

3.2 Restructuring

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

3.3 Current work programme

The social partners are currently working on issues related to vocational training and health and safety, as well as debating questions related to the competitiveness and development of the sector.

Horeca

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Statistical classification

The NACE classification 55 most closely covers the sector and includes catering, hotels, restaurants, cafés, canteens, short-stay accommodation and similar establishments.

1.2 Employment and enterprise

In the EU-25 (2004) the HORECA sector employs 7.8 million people. 76.4% of those working in the sector have an employee status and just under three quarters are full-time (72.6%). 54.3% of workers are women. 89.7% of the workforce has a low or intermediate education level. Large numbers of seasonal workers are hired in addition to permanent staff during peak periods. This is largely an SME-dominated sector, with over 99% of firms employing fewer than 250 individuals. Although more than 90% of enterprises in the sector employ fewer than ten people, larger enterprises are important in terms of employment. Over 45% of employment is concentrated in these enterprises, and a sub-sector of HORECA, contract catering, is strongly characterised by large enterprises of this type.

1.3 Challenges and perspectives

The HORECA sector is very sensitive to business cycles and to political events.

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

PART 2. THE SOCIAL PARTNERS OF THE HORECA SECTOR

The HORECA sectoral social dialogue committee was created in 1999 and rules of procedure adopted in 2004. An informal social dialogue had been in place since 1983.

2.1 Workers' representatives

- The **European Federation of Food, Agriculture and Tourism Workers (EFFAT)** comprises 128 national trade unions from 37 European countries, representing more than 2 600 000 members. EFFAT is a member of the ETUC (European Trade Union Confederation), and is a regional organisation of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF).

2.2 Employers' representatives

- The **Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments (HOTREC)** represents 36 national trade and employers' associations from the EU and has members in all Member States (except Cyprus, Latvia, Luxembourg, Slovenia and Slovakia) as well as in Norway and Switzerland.

PART 3. RECENT OUTCOMES OF THE HORECA SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Young people and the hospitality industry – Contribution to the European Youth Initiative		
	Common reply to the Commission consultation (31 January 2005) on: '2006 – European Year of Mobility for Workers – Towards a European Labour Market'		
2004	Social Dialogue in the European hotel and restaurant sector – Work programme 2004	An initiative for improving Corporate Social Responsibility in the hospitality sector	
	Joint Recommendation: Guidelines for training and development, especially in SMEs, in the hotel, restaurant and café sector		
	Social Dialogue work programme 2004		
2002	Joint declaration on EU-Enlargement		
	Participation of the representatives of the social partners of the candidate countries in the sector social dialogue		
	Joint comments on the Commission communication 'Working together for the future of European tourism'		

3.1 Corporate Social Responsibility

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

3.2 Integrating organisations from the new Member States and the candidate countries

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

3.3 Training and lifelong learning

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

3.4 Undeclared work

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

3.5 Young people

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

3.6 Current work programme

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

Inland waterways

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 61.2 most closely covers the sector.

1.2 Employment and enterprise

The nautical personnel in the inland navigation is estimated to 35 000 persons in the EU-25. The following categorisation can be made:

- About 23 000 belong to the Rhine corridor (i.e. Switzerland, Germany, Luxembourg, France and the Netherlands);
- About 5 000 to the South-East corridor (Germany, Austria, Slovakia, Hungary, Romania and Bulgaria);
- 3 000 to the East-West corridor (Germany, Poland, the Czech Republic); and
- About 4 000 to the North-South corridor (the Netherlands, Belgium and France).

In the major inland waterway transport countries, the single-vessel operators, which are often family enterprises, form by far the majority of enterprises.

1.3 Challenges and perspectives

While 18 out of 25 Member States have inland waterways (10 of which have an interconnected waterway network), river transport accounts for a 7% share of the total inland transport of goods in the EU-25. The White Paper on the European transport policy for 2010 recommends that inland waterway transport, together with rail and short sea shipping, take a larger share of the transport market.

Inland waterway transport in the EU is currently administered under different regimes, namely the Mannheim and Belgrade Conventions for navigation on the Rhine and Danube as well as relevant EU legislation and legislation from the Member States. Despite well-established co-operation between the different participants, the current framework is characterised by a lack of efficiency. Its legitimacy is also challenged by the fact that only the EU can adopt binding rules for its entire network.

PART 2. THE SOCIAL PARTNERS OF THE INLAND WATERWAY TRANSPORT SECTOR

The inland waterway transport social dialogue committee was established in 1999 and the internal rules of procedure were adopted in 2005.

2.1 Workers' representatives

- The **European Transport Workers' Federation (ETF)** represents some three million workers from all transport modes in 39 European countries.

2.2 Employers' representatives

- The **European Barge Union (EBU)** represents the barge owners and barge operators in Austria, Belgium, the Czech Republic, France, Germany, the Netherlands and Switzerland.
- The **European Skippers' Organisation (ESO)** represents the interests of the European private inland shipping entrepreneurs on a European level. The ESO-Council is composed of representatives of Belgian, Dutch, French and German inland shipping organisations.

PART 3. RECENT OUTCOMES OF THE INLAND WATERWAY TRANSPORT COMMITTEE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Rules of procedure		

The inland waterway transport sectoral social dialogue committee did not meet between 2000 and 2004, but discussions were restarted in 2004. The committee adopted its internal rules of procedure and work programme in 2005.

3.1 Integrating organisations from the new Member States and candidate countries

Identifying and integrating social partner organisations from the new Member States and the candidate countries along the Danube is another objective of the inland waterway transport social partners.

3.2 Training and lifelong learning

The social partners are developing an inventory of professional qualifications in the EU. The aim is to enhance mobility and to reach equivalence in professional qualifications. The final objective could be the definition of EU-wide professional qualification requirements.

3.3 Working time

According to the committee the current working-time Directive does not take into account the specific needs of the sector, such as a definition of periods of availability. The parties have so far exchanged position papers, with a view to starting negotiations, in order to come to a sector-specific solution for working-time arrangements.

3.4 Current work programme

The current work programme includes the above-mentioned points.

Insurance

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 66 most closely covers the sector and includes insurance and pension funding, except compulsory social security.

1.2 Employment and enterprise

In 2004, 1.2 million people worked in the insurance sector in the EU-25. 86% of the insurance workers have an employee status and full-time work predominates (86%). Women account for just over half of the total employed (51.3%). 32% of the workforce has a high education level.

1.3 Challenges and perspectives

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

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

PART 2. THE SOCIAL PARTNERS OF THE INSURANCE SECTOR

An informal working party had been in place since 1987 and the sectoral dialogue committee was established in 1999 when the internal rules of procedure were adopted.

2.1 Workers' representatives

- **UNI-Europa, is part of Union Network International (UNI)** which represents around 1 000 trade unions in 140 countries. It is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including the finance sector, for which it has a specific section. The number of affiliated workers in the banking sector is about 800 000.

2.2 Employers' representatives

- **The European Federation of National Insurance Associations/Comité Européen des Assurances (CEA)** is a federation of national associations of insurance companies composed of associations or employers organisations with one member from each country. It has members in each country of the EU-25, in the 4 candidate countries and those of EFTA (Iceland, Liechtenstein, Switzerland and Norway). More than 5 000 European insurance and reinsurance companies are represented by CEA and they employ more than 1 million people.

- **The Association of European Cooperative and Mutual Insurers/l'Association des Assureurs Coopératifs et Mutualistes Européens (L'ACME)** is made up of mutual and co-operative insurance organisations. It is the European regional organisation of International Cooperative and Mutual Insurance Federation – ICMIF. ACME has members in the Member States, except in the Baltic States, Cyprus, Malta, Hungary and Slovenia and also in Bulgaria, Iceland, the Russian Federation and Switzerland.

- The **European Federation of Insurance Intermediaries (BIPAR)** consists of some 48 national associations of professional insurance agents and brokers from all Member States except Cyprus, Latvia and the UK. BIPAR also has members in Israel, Lebanon, Norway, Romania, the Russian Federation, Switzerland, Turkey and Ukraine. BIPAR represents about 100 000 self-employed and corporate professional insurance intermediaries employing more than 150 000 people and is a member of the World Federation of Insurance Intermediaries (WFII).

PART 3. RECENT OUTCOMES OF THE INSURANCE SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2003	Proposal for a joint statement at European level		
	CEA Survey on supply and demand for training in EU countries (+Norway)		
	Reflections on the Commission's Green Paper on partnership for a new organisation of work		

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

Since 2002, the key item has been vocational training. A joint survey on supply and demand for training in EU countries (and Norway) was launched in 2003, the statements and reflections of which have been approved by the insurance social partners. However a joint text on this issue has not yet been concluded.

Live performance

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 92.3 most closely covers the sector and includes artistic and literary creation, interpretation, operation of arts facilities, fair and amusement parks and other entertainment activities in direct contact with the public.

1.2 Employment and enterprise

In the EU-25 (2004[1]) the live performance sector employs more than 700 000 workers. 60% of them have an employee status and part-time work accounts for 29%. 43% of workers are women. 42% of the workforce has a high education level.

1.3 Challenges and perspectives

The slow growth or even decline in public subsidies in EU countries in recent years has put the budgets of many established performing arts organisations under pressure. By its nature, the live performance sector sees significant geographical mobility. However, the European social partners consider that there is still no satisfactory response to the problems of visas, work permits, residence, recognition of diplomas, status of artists in terms of social protection and taxation. This arises from disparities in legislation between European countries.

PART 2. THE SOCIAL PARTNERS OF THE LIVE PERFORMANCE SECTOR

The live performance sectoral social dialogue committee was established in 1999 and the internal rules of procedure were adopted in January 2003.

2.1 Workers' representatives

- The **European Arts and Entertainment Alliance (EAEA)** is recognised as the social partner on the workers' side. The EEA comprises EURO-MEI, FIM and FIA, and represents cultural and media workers at the international and regional level. The EEA is recognised as the industry federation for media, entertainments and arts by the ETUC.
- The **Media and Entertainment International-Technical Professions of the Entertainment Sector (EURO-MEI)** is part of Union Network International (UNI), which represents over 130 trade unions with a total membership of 250 000 workers and 14 service sectors.
- The **European Federation of Artists and Actors (EuroFIA)** represents trade unions in the EU-25 Member States (with the exception of Lithuania and Malta) as well as in EFTA countries. It is part of the International Federation of Artists and Actors (FIA) which represents more than 100 unions, guilds and associations, in more than 75 countries.
- The **International Federation of Musicians (FIM)** represents 24 member organisations in the EU-25, and 72 throughout the world and has close working relations within the framework of the International Arts Entertainment Alliance (IAEA).

2.2 Employers' organisations

- The **Performing Arts Employers Association League in Europe (PEARLE*)** represents more than 3 000 employers from theatres, theatre production companies, orchestras and music ensembles, opera houses, ballet and dance companies, festivals, and other organisations within the performing arts sector. PEARLE* is member of EEN (the European Employers' Network)

1 2004 LFS are lacking for BE, CY, DK, EL, FI, IE, LV, SE, SI and the UK.

facilitated by UNICE (Union of Industrial and Employers Confederations of Europe) and of EFAH (the European Forum for the Arts and Heritage). PEARLE* has members in every EU-25 country, except in Cyprus, Greece, Ireland, Latvia, Lithuania, Luxembourg, Malta, Portugal and Slovenia. PEARLE* also has members in Norway and Switzerland.

PART 3. RECENT OUTCOMES OF THE LIVE PERFORMANCE SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Joint declaration on the Unesco Convention on the protection and promotion of the diversity of cultural expressions in relation to the GATS-negotiations within the WTO		
2004	Declaration 'towards enlargement of the European social dialogue in the performing arts sector'		
2003	Rules of procedure		

3.1 Integrating organisations from the new Member States and the candidate countries

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

EAEA and PEARLE* are implementing a project aimed at the organisation of three regional round tables to strengthen social dialogue and reinforce the capacities of national partner organisations in the new Member States.

3.2 Training and lifelong learning

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

Since then, the sectoral social dialogue committee has launched a three-year project on job creation and promotion, aimed at identifying and publicising good practice and other measures and initiatives introduced in the public and private sectors.

3.3 Current work programme

The sectoral social dialogue committee is working on issues of enlargement, technical training in theatre and mobility. In particular, in response to the European year of mobility in 2006, they are preparing a study on the free movement of workers and products in the cultural sector.

EAEA and PEARLE* are also following the European Parliament's report on the dynamics of the live performance sector and are identifying problems regarding health and safety in the performing arts sector, particularly in relation to the EU Directive on noise at the workplace.

Local and regional government

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sectoral classification

No specific NACE classification covers local and regional government. 75.1 covers administration of the state and the economic and social policy of the community and 75.2 covers provision of services to the community as a whole (excluding central government). Other activities such as social work, healthcare and education may, in some cases, form part of local and regional government.

1.2 Employment and enterprise

In the EU-15 (2001) 11.86 million people were working in local and regional government. 99.6% of the local and regional governments' workers have an employee status and 11% work part-time. 41% of these workers are women. 30.5% of the workforce has a high education level[1].

1.3 Challenges and perspectives

A Commission White Paper (2004) on public services sets out its approach to developing a role for the EU in fostering high-quality services, accessible to all citizens and enterprises in the EU at affordable prices. These services can be organised in co-operation with the private sector or delivered by private or public undertakings, but the public authorities remain responsible for market regulation and monitoring outcomes. This responsibility is carried out in the context of decisions made at the level of the EU and national states but it is primarily for the relevant national, regional and local authorities to define, organise, finance and monitor this area. The Commission is now taking action to modernise and clarify the framework in which public services are delivered.

PART 2. THE SOCIAL PARTNERS OF THE LOCAL AND REGIONAL GOVERNMENTS SECTORAL SOCIAL DIALOGUE

The social partners began working together and issuing common texts in 1998 and have continued in the sectoral social dialogue committee since they adopted their internal rules of procedure in 2004.

2.1 Workers' representatives

- The **European Federation of Public Service Unions (EPSU)** represents over 216 public sector unions covering approximately 8 million workers in more than 36 EU and applicant countries, as well as EFTA countries. EPSU is a member of the European Trade Union Confederation (ETUC) and Public Service International (PSI). In 2003, EPSU agreed with EUROFEDOP to integrate into EPSU's delegation two permanent representatives from EUROFEDOP.

2.2 Employers' representatives

- The **Council of European Municipalities and Regions (CEMR)** represents national associations of towns, municipalities and regions from every EU-25 country as well as from Albania, Bulgaria, the Former Yugoslav Republic of Macedonia, Iceland, Israel, Norway, the Federation of Serbia and Montenegro, Switzerland and Ukraine. Together these associations represent some 100 000 local and regional authorities. CEMR is the European section of the International Union of Local Authorities (IULA).

1 The 2004 LFS cover AT, CZ, DE, EE, ES, FI, FR, IT, LT, LU, HU, MT, NL, PL, PT and SK for NACE codes 75.1 and 75.2.

PART 3. RECENT OUTCOMES OF THE LOCAL AND REGIONAL GOVERNMENTS SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Joint statement on EU employment policy		
2004		Joint statement on telework	

3.1 Gender equality

In order to achieve equality between women and men at work, CEMR and EPSU adopted a joint declaration in 1998. This encouraged member organisations to develop a strategy including positive action programmes; diversification of women's educational and professional choices; campaigning against sexual harassment; encouraging work-life balance and supporting equal pay for work of equal value.

3.2 Telework

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

3.3 Current work programme

The social partners have agreed to structure their actions in the years 2006 and 2007 around four broad themes: strengthening social dialogue in local and regional government in the new Member States and in candidate countries, supporting the reform process in local and regional government, promoting diversity and equality in local and regional government and evaluating experience in various forms of service provision.

Personal services

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 92.02 most closely covers the sector and includes hairdressing and other beauty treatments.

1.2 Employment and Enterprise

In the EU-15 (2001), the personal services sector covered over one million workers. The sector has a large majority of women workers (over 80%). Many of them work part-time and only stay in the sector for short periods of time. The sector has a significant number of self-employed workers and undeclared work is common[1].

The total number of hairdressing companies (2001) in the EU-15 amounted to some 355 000 and the total number of salons to some 400 000. The nature of companies in the sector varies significantly from large international chains to small salons that are usually family-run. For the most part, however, firms are usually small or very small.

1.3 Challenges and perspectives

During the last years there have been few innovations in technology, products and techniques and new developments largely revolve around the improvement in the user-friendliness, quality and safety of mass marketed products for home use, in particular colouring products. The reduction in business resulting from this increasing trend towards 'do-it-yourself' is leading the personal services industry to seek to compete on quality, to diversify and to develop new niche markets such as health and beauty treatments.

In some EU countries, significant efforts have also been made to raise training standards and the quality of entrants into the profession, while at the same time restructuring hairdressing into a holistic fashion and beauty service provider.

PART 2. THE SOCIAL PARTNERS OF THE PERSONAL SERVICES SECTOR

There has been an informal working party since 1998 and a sectoral dialogue committee for the personal services since 1999. Currently, the dialogue is restricted to the trade unions and employers' representatives in the hairdressing sector, although there is the also the possibility that social partners' representatives from the cosmetics industry will soon participate.

2.1 Workers' representatives

- **UNI-Europa** is a part of UNI (Union Network International) which represents around a 1 000 trade unions in 140 countries and is responsible for social dialogue with the corresponding employers' organisations in various areas of activity in the service sector, including personal services, where it has a separate section called Hair and Beauty.

2.2 Employers' representatives

- **Coiffure EU** is the association of employers' organisations active in the field of hairdressing in the EU and EFTA countries of Austria, Belgium, Denmark, Finland, Germany, Italy, the Netherlands, Poland, Sweden and the UK as well as Switzerland and Norway.

1. See http://europa.eu.int/comm/employment_social/employment_analysis/work/undecl_work_final_en.pdf.

PART 3. RECENT OUTCOMES OF THE PERSONAL SERVICES SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Declaration on the development of professional hairdresser training in Europe		
2005	Covenant on health and safety, in particular the use and handling of cosmetic products and their chemical agents		

3.1 Health and safety

Health and safety at work is an important topic, given that individuals working in hairdressing have problems with regular contact with chemical products and frequent non-ergonomic postures. The social partners are currently implementing the 'Cinderella' research project to develop better ergonomic tools and furniture in order to reduce risks such as repetitive strain injury. Information materials will be developed and disseminated to raise awareness of research outcomes and best practice. The social partners are also preparing a study on the feasibility of a website collecting official information relating to the sector, such as legislation in the Member States in relation to occupational diseases, national collective agreements and so on.

3.2 Training and lifelong learning

Development of the workforce through training is one of the key topics in the work of the personal services sectoral social dialogue committee and CD ROM-based training materials were created and disseminated in 1999. Since 2002, the social partners have been working towards increasing quality standards through the mutual recognition of qualifications.

3.3 Working conditions

In 2001 the social partners signed a code of conduct entitled 'guidelines for European hairdressers', that made recommendations establishing standards for behaviour concerning training, equal treatment and non-discrimination, the prohibition of child labour, freedom of association, collective bargaining, information and consultation, fair wages and decent benefits, the reconciliation of private and professional life and the condemnation of undeclared work. There is a commitment to continuously monitor progress.

3.4 Current work programme

UNI-Europa and Coiffure EU are currently working on issues dealing with health and safety, skills certification and enlargement.

Postal services

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 64.1 most closely covers the sector and includes post and courier activities.

1.2 Employment and enterprise

Employment in the postal sector (2001) is of around 1.7 million people in 33 200 enterprises. 97% of the postal workers have an employee status and full-time work is predominant (79%). 49 % of postal workers are women. 89% of the workforce has a low or intermediate education level[1].

1.3 Challenges and perspectives

Postal services have been gradually liberalised since 1997 when a Directive opened about 3% of the regulated national mail services markets to competition. The postal services Directive adopted in 2002 defined further steps in the process up until 2006 when a further 20% of the sector will be subject to competition. A further study by the Commission will make proposals for the potential opening up of a full internal market for postal services in 2009. However, Community legislation allows the EU Member States to appoint one or more universal service providers (USP), which are obliged to deliver such a service but also to benefit from a monopoly of the postal market still not liberalised.

PART 2. THE SOCIAL PARTNERS OF THE POSTAL SECTOR

The social partners have been working together inside the structure of an informal working party for the postal sector since 1994. A sectoral dialogue committee was established in 1999 and adopted its internal rules of procedure in the same year.

2.1 Workers' representation

- **UNI-Europa is a part of UNI (Union Network International)**, which represents around 1 000 trade unions in 140 countries and is responsible for social dialogue with the corresponding employers' organisations, in numerous areas of activity in the service sector, including postal services, for which it has a specific section. In 1999, UNI-Europa agreed with EUROFEDOP to integrate 2 permanent representatives from EUROFEDOP into their delegation.
- **EUROFEDOP** represents 52 public service trade unions and is part of the International Federation of Employees in the Public Service (INFEDOP). EUROFEDOP has members in every country of the EU-25, except Cyprus, Estonia, Lithuania, Poland and Slovenia and also has members in Albania, Bulgaria, Croatia, Romania and Switzerland.

2.2 Employers' organisation

- The **Association of European Public Postal Operators (PostEurop)** represents members in every EU-25 Member State, in the four candidate countries as well as in the EFTA countries. Post Europ is part of the Universal Postal Union (UPU).

1 2004 LFS data are lacking for BE, CY, DK, EL, IE, LV, SI, SE and the UK.

PART 3. RECENT OUTCOMES OF THE POSTAL SERVICES SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Joint statement of the EU social partners in the postal sector on Corporate Social Responsibility		
2004	Common website Postal Sector: 'social dialogue on line – PostSocial-Dialogue'		
2004	Joint declaration on enlargement		

3.1 Employment

In 1998 the sectoral social dialogue committee adopted guidelines in order to promote employment. They made commitments on the protection of employment, recruitment and non-discrimination and developed recommendations on the improvement of working conditions. The guidelines indicated the need for greater consultation with employee representatives, to help facilitate change. The social partners committed to review the guidelines every year in order to further develop its approach and to publish and distribute the results and conclusions of the follow-up process.

3.2 Equal opportunities

In 2001, PostEurop and UNI-Europa published and disseminated a compendium of good practice in the field of equal opportunities, including examples of measures on work/life balance; protection of pregnant women; reintegration of workers after career breaks; the employment of ethnic minorities, assistance for workers with drug problems and the accessibility of management posts to women.

Since 2002, PostEurop and UNI-Europa have been involved in the Commission's impact assessment of liberalisation with a particular focus on employment change through a study of trends in the EU postal sector.

3.3 Integrating organisations from the new Member States and the candidate countries

In 2001 and 2003, PostEurop and UNI-Europa organised two conferences on enlargement. They issued a joint declaration expressing their willingness to participate in the European social model, to play an effective role in all aspects of the European social dialogue and to promote the process of enlargement.

3.4 Promotion of social dialogue

In order to facilitate the working of the postal services sectoral social dialogue committee and to promote the outcome of their dialogue the committee launched the first sectoral social dialogue website in 2004. This presents good practice in training and skills development, equal opportunities and enlargement. It also aims to encourage and facilitate a continuous exchange of opinions between the social partners at a European level.

3.5 Training and lifelong learning

In 1998 guidelines on promoting employment in the postal sector in Europe, the partners made a commitment to training on issues relating to working methods, the use of equipment, hygiene and safety. In 2000 the sectoral social dialogue committee organised a round table on training and skills development in order to exchange best practices concerning employment, new technologies, adaptation to change, training methods and techniques.

3.6 Current work programme

The committee is currently working on enlargement, vocational training, and Corporate Social Responsibility as well as on health and safety (in particular accident prevention). They are also involved in exchanges with other sectoral social dialogue committees in order to seek synergies and to promote sectoral social dialogue.

Private security

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sectoral classification

The NACE classification 74.6 most closely covers the sector and includes the private security industry including guarding, surveillance and transport security.

1.2 Employment and enterprise

The EU-25[1] (2004) employs 1.1 million workers in private security sector which comprises 27 000 enterprises. 96% of the private security workers have an employee status and full-time work predominates (89%). Most people who work in the sector are men (85%). 87% of the workforce has a low or intermediate education level.

1.3 Challenges and perspectives

The private security sector is experiencing growth, particularly in the new Member States. The general reasons for growth include the increasing outsourcing of security services by public authorities; the transfer by banks and large stores of some of their activities to private sector security firms; the increased demand for security services at sea and airports and increasing demand by private clients. Notwithstanding the global growth of the sector, cash-in-transit (CIT) activities are declining as a result of technological developments and the increased use of electronic transactions, as well as the introduction of the Euro.

PART 2. THE SOCIAL PARTNERS OF THE PRIVATE SECURITY SECTOR

The social partners have been working together inside the structure of an informal working party since 1992 and in the sectoral dialogue committee since 1999 when the internal rules of procedure were adopted.

2.1 Workers' representatives

- **UNI-Europa is a part of UNI (Union Network International)**, which brings together around 1 000 trade unions in 140 countries, and is responsible for social dialogue with the corresponding employers' organisations in various areas of activity in the service sector, including private security for which it has a specific section. In the European private security sector, UNI-Europa represents 30 trade unions and more than 200 000 members. In the property services section dealing with private security, UNI-Europa has no members in Cyprus, the Czech Republic, Latvia, Malta, Slovakia and Slovenia.

2.2 Employers' organisation

- The **Confederation of European Security Services (CoESS)** represents 12 564 companies covering a total of 578 150 employees in the EU-25. CoESS has members in 23 countries of the 25 EU Member States. It is not represented in Lithuania and Malta, but has members in Bulgaria, Romania, Norway, Switzerland and Turkey.

1 Source: CoESS and UNI-Europa. 2004 LFS data are lacking for BE, CY, DK, EL, IE, LV, SI, SE and the UK.

PART 3. RECENT OUTCOMES OF THE PRIVATE SECURITY SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2004	Joint declaration: towards a European Model of Private security Position paper on the Commission's proposal for a Directive on services in the internal market		
2003		Code of conduct and ethics for the private security sector	

3.1 Integrating organisations from the new Member States and the candidate countries

At a 1999 conference the sectoral social dialogue committee adopted a joint declaration on the future enlargement of the European Union. CoESS and Euro-FIET (the predecessor of UNI-Europa) declared that they would organise regular monitoring of the private security sector in this region in order to develop their contacts with the Central and Eastern European social partners. CoESS and UNI-Europa have made efforts to integrate representative organisations from the new Member States in their structures following conferences on enlargement in 2002 and 2005.

3.2 Public procurement

In order to promote best value, rather than lowest price, in call for tenders relating to private security services in 1999 the social partners published a handbook for organisations awarding such contracts.

3.3 Sectoral policy

In order to improve the functioning of the internal market the sectoral social dialogue committee adopted a joint opinion on the regulation of licensing in 1996 and adopted a further joint opinion in 2001 on the harmonisation of legislation governing the sector. This covered issues such as licences, public regulation and minimum standards in areas such as working conditions, health and safety and training.

3.4 Training and lifelong learning

In 2003 the sectoral social dialogue committee adopted a code of conduct for the sector, in which they agreed to promote basic, specialised and ongoing vocational training. A similar commitment had been made in 1996 when they adopted a text on 'vocational training in the European security industry'. In 2001, they developed a European vocational training manual for basic guarding and in 2004 they published a European training manual on the prevention of occupational hazards.

3.5 Working conditions and equal opportunities

In 2000 UNI-Europa and CoESS made a commitment to modernise the organisation of work by adopting a joint declaration, which stressed the importance of innovative solutions to problems being generated through consultation between the social partners. In the 2004 joint declaration entitled 'towards a European model of private security', CoESS and UNI-Europa renewed their commitment to improving working conditions ensuring quality and professionalism.

The 2003 code of conduct promoted equal opportunities and supported the full integration of security employees, regardless of their ethnic or social origin, colour, gender, trade union affiliation, religion, nationality, sexual orientation or other distinguishing characteristics. CoESS and UNI-Europa will monitor and evaluate the implementation of this code within their social dialogue.

3.6 Current work programme

The private security social partners are currently working on issues of cross-border transport security, vocational training, enlargement, the modernisation of work organisation, undeclared work, restructuring and gender equality.

Railways

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 60.1 most closely covers the sector.

1.2 Employment and enterprise

EU-25 employment in railway and infrastructure companies totalled 1.2 million people in 2002. The number of undertakings in the EU was at least 650 in 2001 but there are marked differences between countries, with some very large companies dominant in some cases and small enterprises in others.

1.3 Challenges and perspectives

Rail transport in Europe has experienced significant decline for almost thirty years, especially in the area of freight and, in the last 15 years, the number of workers employed in this sector in the EU was reduced by approximately 45%. The main reasons for this are competition from road haulage and longer delivery times because of the priority given to passenger transport; complicated formalities and cross-border differences in infrastructure and staffing. However, the railways have the advantage of being a safe, environmentally clean transport mode and having high capacity (one train can contain up to 50-60 truckloads). Revitalising the railways is thus a high priority in the EU common transport policy. While the EU is not pursuing privatisation policies in the sector, the Commission encourages competition which stimulates innovation and efficiency.

PART 2. THE SOCIAL PARTNERS OF THE RAILWAYS SECTOR

A joint committee was first established in 1972, followed by a railways sectoral social dialogue committee in 1999, when the internal rules of procedure were adopted.

2.1 Workers' representatives

- The **European Transport Workers' Federation (ETF)** represents some three million workers from all transport modes in 39 European countries.

2.2 Employers' organisations

- The **Community of European Railway and Infrastructure Companies (CER)** represents 44 railway undertakings and infrastructure companies from the EU-25 excluding Cyprus and Malta where there are no railways but including Bulgaria, Croatia and Romania as well as Bosnia/Herzegovina, Norway, Serbia/Montenegro and Switzerland.
- The **European Rail Infrastructure Managers (EIM)** organisation represents 12 independent infrastructure managers' associations in Denmark, Finland, France, the Netherlands, Norway, Portugal, Slovenia, Spain, Sweden and the UK.

PART 3. RECENT OUTCOMES OF THE RAILWAYS SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Final report on 'Representation and better integration of women in the different professions of the railway sector'		
2004	Recommendation on the revision of the Eurovignette Directive		
			Agreement on certain aspects of the working conditions of railway mobile workers assigned to interoperable cross-border services
			Agreement on the European licence for drivers carrying out a cross-border interoperability service

3.1 Working conditions

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

Between 2000 and 2005, the sectoral dialogue committee's working groups carried out several projects which produced reports on the use of new technologies in training, on work organisation, on the employability concept, on interoperability, on the representation of women in the different railway professions, and on the sectoral social dialogue after enlargement.

3.2 Current work programme

In addition to the implementation of the above agreements, the committee is being consulted on the 'human' dimension of draft technical specifications for interoperability. Further projects will address the consequences of the reorganisation of freight services and the social impact of the European Rail Traffic Management System (ERTMS), quality standards for the future accreditation of training centres for train drivers and information seminars in the new Member States and the candidate countries on the importance of European sectoral social dialogue.

Road transport

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 60.2 most closely covers the sector and includes passenger transport and freight transport.

1.2 Employment and enterprise

In the EU-25 more than 3.5 million people work in the road transport sector. There are over 700 000 enterprises in the sector, which are mostly small or medium-sized.

1.3 Challenges and perspectives

Road transport has grown significantly over recent decades and there is important EU policy development in areas such as common rules on access to the market and to the occupation, promotion of fair competition, improvement of social conditions (e.g. working-time legislation implying limitations on driving times and minimum rest periods using the tachograph as mean of control), driving restrictions and road charging.

PART 2. THE SOCIAL PARTNERS OF THE ROAD TRANSPORT SECTOR

The European road transport social partners set up an informal social dialogue in 1965. The road transport sectoral social dialogue committee was formally created in 1999 and the internal rules of procedure were adopted in 2000.

2.1 Workers' representatives

- The **European Transport Workers' Federation (ETF)** represents some three million workers from all transport modes in 39 European countries.

2.2 Employers' representatives

- The **International Road Union (IRU)** represents members in the 25 EU Member States. IRU has signed a co-operation agreement with UITP (International Association of Public Transport) with regard to its participation in the committee.

PART 3. RECENT OUTCOMES OF THE ROAD TRANSPORT SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Joint Recommendations on employment and training in logistics		
2003	Recommendations to the representatives of managements and of trade unions in local public transport companies in the European Union		
	Joint declaration on the road safety action plan		
	Joint declaration concerning the social dialogue and enlargement		
	Summary report – Insecurity and the feeling of insecurity in local public transport		

3.1 Economic and sectoral policies

IRU and ETF adopted a joint opinion in 2000 in which they invited the European authorities to adopt the necessary legislation to stop illegal employment of third country drivers below EU standards on vehicles engaged in intra-community road transport.

3.2 Training and lifelong learning

In 2005, the committee adopted joint recommendations on employment and training in logistics aimed at uplifting the workers' skills and competences, improving the quality of the logistics services and facilitating the mobility of workers.

3.3 Working conditions

In 2002, the committee's working group on urban public transport carried out a study on insecurity in local public transport. At a subsequent conference recommendations were made to promote social dialogue at company level as the best tool to prevent insecurity and the feeling of insecurity. Further recommendations concerned the collection of information and the application of good practice in relation to human resources, technology, the organisation of work and its impact on the individual.

3.4 Current work programme

The social partners are currently working on road safety (in particular minimum criteria for appropriate rest areas for truck drivers), training, work organisation and new technologies (i.e. the digital tachograph).

Sea fisheries

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 0.5 most closely covers the sector.

1.2 Employment and enterprise

In the EU-15 (2003) some 260 000 workers were employed directly in sea fishing and the EU fleet comprised more than 97 000 vessels, which vary greatly in size and fishing capacity.

1.3 Challenges and perspectives

In 2002 the EU-25 produced nearly 7.6 million tonnes of fishery products, or about 5% of the world total, but between 1995 and 2002, EU-25 production fell by 17%, while world production rose by 17%.

The European Union has developed a Common Fisheries Policy (CFP) to allow for the continuous renewal of stocks and the protection of marine ecosystems. Common measures are agreed in the areas of conservation, markets, relations with the outside world and action to help the industries adapt their equipment and organisation.

Balancing fishing capacity with the available resources is a priority to ensure sustainable fishing. Funds are made available through the Financial Instrument for Fisheries Guidance (FIFG) for ending the fishing activities of vessels and for scrapping or reconverting fishing vessels. Grant aid can also be allocated for the construction and modernisation of fishing vessels to ensure that the Community fleet remains competitive, to improve safety on board and to encourage the use of more selective fishing techniques.

PART 2. THE SOCIAL PARTNERS OF THE SEA FISHERIES SECTOR

A joint committee was established in 1974 and the sea fisheries sectoral social dialogue committee in 1999.

2.1 Workers' representatives

- The **European Transport Workers' Federation (ETF)** represents some three million workers from all transport modes in 39 European countries.

2.2 Employers' organisations

- **Europêche** is the representative association of national organisations of fishing enterprises in the EU and has member organisations in Belgium, Denmark, Germany, Greece, Ireland, Italy, Malta, Spain, Sweden, the Netherlands and the UK.
- The **General Confederation of Agricultural and Fisheries Co-operatives (COGECA)** represents about 30 000 agricultural and fisheries co-operative enterprises and has members in all Member States as well as in Romania and Bulgaria. It has a specific fisheries section.

PART 3. RECENT OUTCOMES OF THE SEA FISHERIES SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Position of the Social Dialogue Committee in the fisheries sector regarding the Commission's proposal for a Council regulation on the European Fisheries Fund (COM(2004) 497 final		
2002	Final declaration on the sectoral social dialogue and enlargement		
	Position on the socio-economic dimension of the Common Fisheries Policy and the Commission's Action plan to counter the social, economic and regional consequences of the restructuring of the EU fishing industry		

3.1 Integrating organisations from the new Member States and candidate countries

At a conference in 2002, the social partners signed a declaration, underlining the importance of the recognition by the new Member States of professional organisations as social partners who should be systematically consulted on fisheries policy.

3.2 Restructuring

The social partners monitor the development of the Common Fisheries Policy and have issued several joint opinions in this context.

In 2002, ETF, Europêche and COGECA-Fisheries adopted a joint opinion on the Commission action plan for monitoring the socio-economic consequences of restructuring. The sectoral social dialogue committee considered that more attention should be paid to social considerations and proposed a series of measures such as the promotion of training, sustainable employment objectives, compensation linked to loss of income, health and safety, the modernisation of vessels, combating flags of convenience and illicit practices, and the improvement of retirement conditions. A similar opinion was issued in 2001 concerning the socio-economic aspects of the Commission 'green book' on the future of the Common Fisheries Policy.

3.3 Training and lifelong learning

In 2000, the social partners developed, with the support of the European Commission, the European Network for Fisheries Training and Employment (REFOPE), which connects training institutes in the sector in order to promote employment and access to the profession to young people, in particular through an information service and training activities. REFOPE brings together a list of fisheries' training courses in the various Member States, provides a directory of training institutes, facilitates the exchange of teaching materials and supports the training of teachers.

3.4 Working conditions

In 2001, the social partners issued an opinion inviting EU authorities to insert a social clause in the fishing agreements with third countries. This clause states the right of freedom of association and the right to collective bargaining, the principle of non-discrimination, and the right to certain social security benefits and appropriate remuneration levels.

3.5 Current work programme

Important issues in the current work programme are the ILO Convention on working conditions in the fisheries sector, and an update and follow-up to the REFOPE project, as well as health and safety issues. Future work may deal with reinforcing the involvement of organisations from the new Member States and the candidate countries, as well as an initiative linked to employment and competitiveness of the sector. The social partners are also following the ongoing reflections at EU level on a future maritime policy.

Sea transport

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Statistical classification

The NACE classifications 61.1 and 63.2 most closely cover the sector and include sea transport and other supporting transport activities.

1.2 Employment and enterprise

This sector in the EU (2004)[1] employs more than 1.5 million people. 94.5% of the sea transport workers have an employee status and full-time work predominates (91%). 23% of workers are women and 76% of the workforce has a low or intermediate education level. In 2001 sea transport comprised 6 337 enterprises.

1.3 Challenges and perspectives

European shipping controls more than 40% of the world fleet and has the most important maritime clusters in the world. Shipping transports over 90% of European external trade and more than 41% of intra EU transport is sea borne.

EU regulation has opened up national markets to competition. The high level of globalisation and the use of 'flags of convenience', of countries which are far more attractive to ship-owners than Europe in terms of taxation, social legislation and safety or environmental standards, present serious challenges for the sector. The number of EU seafarers employed on EU-flagged ships fell by 37% in the space of ten years (1985-1995), whilst the number of seafarers from non-EU countries rose by 14% over the same period and only 13% of the world's shipping now sails under a Member State flag, compared with 32% in 1970.

To meet these challenges, the EU has acted to devise a global strategy to make the EU fleet competitive again, by means of 'positive measures'; and to improve on-board safety and environmental protection through strict enforcement of international standards within the EU, to ensure a level playing field for those carrying goods by sea between EU ports.

PART 2. THE SOCIAL PARTNERS OF THE SEA TRANSPORT SECTOR

The sea transport sectoral social dialogue committee was established in 1999 and the internal rules of procedure were adopted in the same year.

2.1 Workers' representatives

- The **European Transport Workers' Federation (ETF)** represents some three million workers from all transport modes in 39 European countries.

2.2 Employers' organisations

- The **European Community Ship-owners' Association (ECSA)** comprises the national shipowners' associations of the European Union, except in Cyprus, the Czech Republic, Hungary, Malta, Poland, Slovakia and Slovenia. ECSA is also represented in Norway and is a member of the International Shipping Federation (ISF).

1 2004 LFS data are lacking for BE, CY, DK, EL, FI, IE, LV, SE, SI and the UK.

PART 3. RECENT OUTCOMES OF THE SEA TRANSPORT SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Career mapping report		
2004		Guidelines on eliminating workplace harassment and bullying 'Equality of opportunity and diversity in the European shipping industry'	
2003	ILO seafarers' identity documents convention (revised)		
2002	Piracy and armed robbery		
2000	Seafarer training and recruitment in Europe		

3.1 Harassment

A set of guidelines entitled 'equal opportunity and diversity in the European shipping industry: Eliminating workplace harassment and bullying' was adopted in 2004. The guidelines aim to help shipping companies eliminate harassment and bullying on board ships and implement effective company policies on equal opportunities. The guidelines have been published in the form of a brochure and are accompanied by training tools.

3.2 Working conditions

A recurrent theme of the work programmes of the social dialogue committee is the development and implementation of measures to ensure good working conditions and a level playing field for carriers between EU ports, notably through relevant ILO instruments.

3.3 Working time

In September 1998, the social partners concluded an agreement on the organisation of the working time of seafarers. The agreement specifies the normal working hours of seafarers in principle at eight hours a day with one day of rest per week and rest on public holidays. The sectoral agreement has been implemented through a Council Directive.

3.4 Current work programme

ETF and ECSA are currently working on issues relating to the ILO draft consolidated maritime convention, as well as a mapping exercise on career and training possibilities in the sector. The situation with regard to manning conditions for regular ferry services is being debated, as well as a possible action on issues with regard to the 2005 Maritime Safety Package. A follow-up of the implementation of the guidelines on eliminating harassment and bullying is being discussed, as well as actions to promote health and safety on board. The social partners are also following the ongoing discussions at EU level on a future maritime policy.

Shipbuilding

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 35.1 most closely covers the sector and includes the building and repairing of ships and boats.

1.2 Employment and enterprise

In 2004, around 350 000 people were directly employed by shipyards and the marine equipment industry in the EU-25[1]. 94% of the shipbuilding workers have an employee status and full-time work predominates (95%). 91% of the workers are men. 82% of the workforce has a low or intermediate education level[2]. There are more than 150 shipyards in the EU and around 9 000 companies are active in them.

1.3 Challenges and perspectives

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

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

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

PART 2. THE SOCIAL PARTNERS OF THE SHIPBUILDING SECTOR

The sectoral dialogue committee for shipbuilding was established in 2003 when its internal rules of procedure were adopted. The committee is the first in the metal trades in the EU.

2.1 Workers' organisation

- The **European Metalworkers' Federation (EMF)** represents 65 metalworkers' unions from 30 countries, with a combined total of 6.5 million members. EMF acts on behalf of unions from all EU-25 Member States as well as from Romania, Bulgaria, Turkey, Norway, Iceland, Croatia, Serbia-Montenegro and Switzerland. It is a part of the ETUC.

2.2 Employers' organisation

- The **Community of European Shipyards' Associations (CESA)** represents members in all EU Member States active in the shipbuilding industry, with the exception of Slovakia. CESA has also members in Croatia, Norway and Romania.

1 Source: DG ENTR.
2 2004 LFS are lacking for DK, EL, FI and the UK.

PART 3. RECENT OUTCOMES OF THE SHIPBUILDING SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Objectives and rules of procedure		

3.1 Restructuring

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

3.2 Training and lifelong learning

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

3.3 Current work programme

The social partners have agreed to work on issues related to the image of the sector, the European Qualifications Framework, restructurings and workers' mobility.

Sugar

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 01.3 most closely covers the sector.

1.2 Employment and enterprise

In the EU-25 in 2000/2001 sugar production involved 335 000 beet-growers and 52 000 employees. The European sugar manufacturing industry comprised 56 companies and 143 factories. There is no sugar production in Cyprus, Estonia, Luxembourg and Malta.

1.3 Challenges and perspectives

The European sugar industry produces annually over 16 million tonnes of white sugar from Community beet and about 1.7 million tonnes from imported raw sugar cane and this level of production puts the EU among the world's leading sugar producers.

The sector is facing important restructuring, due to deregulation and liberalisation pressures. Since the end of the 1990s, the European sugar beet sector has had to face increased competition from sugar cane producers in developing countries, which were given more advantageous market access via the 'Everything but Arms' initiative and the WTO trade liberalisation rounds.

In a 2004 Communication, further developed in 2005, the Commission announced a reform of the sugar common market organisation, implying a decrease in the guaranteed prices and quotas starting with the 2005/2006 campaign. From 2005 to 2007, the social partners expect a reduction of 25% in the number of companies and a reduction of direct employment by 25 000 people, the Member States most affected being Italy, Ireland, Greece and Portugal but also the Czech Republic, Denmark, Finland, Hungary, Latvia, Lithuania, Slovakia, Slovenia and Spain.

PART 2. THE SOCIAL PARTNERS OF THE SUGAR SECTOR

An informal social dialogue was established in 1969 and the sugar sectoral social dialogue committee was created in 1999 when it adopted its rules of procedure.

2.1 Workers' representatives

- The **European Federation of Food, Agriculture and Tourism Workers (EFFAT)** comprises 128 national trade unions from 37 European countries, representing more than 2 600 000 members. EFFAT is a member of the ETUC (European Trade Union Confederation), and is a regional organisation of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF).

2.2 Employers' representatives

- The **European Committee of Sugar Manufacturers (CEFS)** represents the interests of sugar manufacturers and refiners in 21 Member States (non-sugar-producing Member States are Cyprus, Estonia, Luxemburg and Malta) and in Switzerland.

PART 3. RECENT OUTCOMES OF THE SUGAR SECTORAL SOCIAL DIALOGUE COMMITTEE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	Access to the European structural funds practical guide and directions for use for the European sugar industry	Second Report on the Code of conduct on Corporate Social Responsibility	
2004	Brochure on Corporate Social Responsibility and social dialogue in the European Sugar Industry		
		First Report on the Code of conduct on Corporate Social Responsibility	
	Joint position: Commission Green Paper on preferential rules of origin		
2003		Corporate Social Responsibility in the European sugar industry. Code of conduct + annex examples of good practice	

3.1 Corporate Social Responsibility

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

3.2 Economic and sectoral policies

In 1999, the social partners adopted a joint opinion on the common organisation of the market in sugar and its importance for employment, followed in 2000 by a joint text directed to the European authorities on the implications for their sector of the draft Regulation 'Everything but Arms'. A joint opinion was signed in November 2001 on the Generalised System of Preferences, emphasising the need to define rules of origin guaranteeing real added value. A joint position on preferential rules of origin was adopted in February 2004 where a specific approach was requested for the sugar sector, with a view to reconciling transparency, fair trade and real gains for the beneficiary countries.

3.3 Health and safety

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

3.4 Integrating organisations from the new Member States and the candidate countries

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

3.5 Restructuring

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

In 2005, the sugar social partners, together with the beet producers (CIBE) organised a conference with the aim of analysing the restructuring taking place in their sector.

Furthermore, the sugar social partners have approached the Commission requesting the setting up of an EU restructuring fund for their sector. In December, the social partners issued a guide with the title 'Access to the European structural funds practical guide & directions for use for the European sugar industry.'

3.6 Current work programme

The social partners are closely following issues related to the restructuring of the sector. They are also continuing activities with regard to enlargement and CSR.

Tanning and leather

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classifications 19.1 and 19.2 most closely cover the sector and include tanning and dressing of leather; manufacturing of luggage, handbags, saddlery and harness.

1.2 Employment and enterprise

In 2004, the EU tanning and leather industry employed 120 000 workers. 88% of the tanning and leather workers have an employee status and full-time work predominates (90%). 54% of the workers are women. 97% of the workforce has a low or intermediate education level.

In 2002, some 2 798 companies operated in the leather industry in the EU-15. Tanneries in the EU are typically family-owned, small and medium-sized enterprises and regional concentration is strong.

1.3 Challenges and perspectives

As in many European manufacturing industries, employment in the leather industry has dropped considerably in recent years and in the last decade, the EU tanning and leather industry lost over 30% of its companies. Within the overall EU manufacturing industry, the leather industry accounted for 0.18% of total production. Based on indicators such as turnover, production and employment, Italy is by far the leather sector's most important country in the EU, followed by Spain.

Although in 2002 the EU tanning industry was still the world's largest supplier of leather in the international market place, it faced increased competition from, among others, Asia and the Americas. To address this competitive pressure, EU tanners are adjusting their production towards higher quality output and high fashion content leathers. Investments are made in environmental protection, waste reduction, recycling, recovery of secondary raw materials, quality and design.

PART 2. THE SOCIAL PARTNERS OF THE TANNING AND LEATHER SECTOR

The sectoral social dialogue committee in the tanning and leather sector was established in 2001 following activities within an informal working group. The internal rules of procedure were adopted in September 2004.

2.1 Workers' organisations

- The **European Trade Union Federation: Textile, Clothing, Leather (ETUF:TCL)** represents 70 trade unions in 40 European countries and has at least one member in each Member State, with the exception of Luxembourg. ETUF:TCL represents more than 1.2 million workers and is a member of the ETUC and the International Textile, Garment and Leather Workers' Federation (ITGLWF).

2.2 Employers' organisation

- The **European Confederation of National Associations of Tanners and Dressers (COTANCE)** represents national tanners' associations of the 13 EU Member States of Belgium, Finland, France, Germany, Greece, Hungary, Italy, the Netherlands, Portugal, Slovenia, Spain, Sweden and the UK. It has associated members in Norway and Switzerland.

PART 3. RECENT OUTCOMES OF THE TANNING AND LEATHER SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2004	Procedureal rules of the sectoral dialogue committee in the leather/tanning sector		
	EU Spring Summit: Contribution of the Social Partners		
2000		Code of conduct in the sector	
	Programme of social action		
	Contribution to the preparation of the new social policy agenda		
	Contribution to the Lisbon Summit		
	Joint declaration on training		
1999	Impact of the Asian and Russian financial crises on the system		

3.1 Economic and sectoral policies

The social partners closely monitor developments of trade policy issues with an economic and social impact on the sector, such as market access of EU products in third countries, marking of origin, trade development since the end of the quota system, as well as industrial and social measures aimed at improving the competitiveness of the sector.

3.2 Integrating organisations from the new Member States and the candidate countries

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

3.3 Training and lifelong learning

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

3.4 Working conditions

In a code of conduct, the social partners called on their members to actively encourage companies and workers in their sector to respect core labour standards, reasonable working hours, decent working conditions and fair remuneration in all countries in which they operate. As a follow-up to the code in 2003, COTANCE and ETUF:TCL launched, in cooperation with SAI (Social Accountability International), a project aimed at developing and delivering training as well as capacity-building for improved working conditions in the industry. The results of the project were presented at a conference in 2004 and the social partners have decided to organise training activities in countries beyond the EU to ensure the effective implementation of the code down the supply chain.

3.5 Current work programme

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

Telecommunications

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 64.20 most closely covers the sector and includes broadcasting, telephone, telegraph and telex communication and the maintenance of the network.

1.2 Employment and enterprise

In the EU-25 (2004)[1] almost 1.3 million people were employed in telecommunications services. 96% of workers have an employee status and full-time work is predominant (91%). 35% of workers are women. 35% of the workforce has a high education level. In 2001, the telecom sector in the EU comprised 17 874 enterprises, 15% of which had been created during the previous year. The telecom sector in the EU is characterised by a relatively small number of very large firms, many of which were parts of former state monopolies and are the largest employers. However, of the total number of telecommunications enterprises, 84% were micro-enterprises, with less than 10 people and this is characteristic of new entrants to the industry.

1.3 Challenges and perspectives

As a result of liberalisation of the sector, privatisation of state-owned companies, increasing competition, technological innovations as well as the creation of new services and products, telecommunications has undergone large-scale restructuring over the past two decades in order to streamline activities and increase efficiency.

During the 1990s, the community legal framework gradually opened up the telecommunications sector to competition via the services Directive in 1990, the mobiles Directive and full competition Directive in 1996, and the new regulatory framework in 2002.

The development of mobile services in the early 1990s and, more recently, the expansion of Internet services have dramatically transformed the sector from a monolithic industry, based on the copper line, to a multi-faceted services industry comprising, for instance, data transmission and Internet services and mobile data services. Improvements in the quality of networks have reduced the need for traditional skills, such as maintenance and repair but at the same time, demand for new skills such as computer and electronic engineering and marketing and finance has increased.

PART 2. THE SOCIAL PARTNERS OF THE TELECOMMUNICATIONS SECTOR

In 1990 Euro-FIET and ETNO established a joint committee on telecommunications and it was transformed into a sectoral social dialogue committee in 1999.

2.1 Workers' organisations

- **UNI-Europa** is a part of Union Network International (UNI) which represents around 1 000 trade unions in 140 countries, and is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including telecommunications for which it has a specific section called UNI-Europa Telecom. The number of affiliated workers in the telecom sector is about 615 000.
- **EUROFEDOP** represents 52 public service trade unions. It has members in every country of the EU-25, except Cyprus, Estonia, Lithuania, Poland and Slovenia. EUROFEDOP has also members in Albania, Bulgaria, Croatia, Romania and Switzerland. The number of affiliated workers in the telecommunications sector is about 40 000. In 1999, UNI-Europa Telecom agreed with EUROFEDOP to integrate in UNI-

1 2004 LFS are lacking for BE, CY, DK, EL, IE, LV, SE, SI and the UK.

Europa Telecom's delegation two permanent representatives from EUROFEDOP.

2.2 Employers' organisation

- The **European Telecommunications Network Operators' Association (ETNO)** represents enterprises themselves and not employers' organisations. The 41 affiliated enterprises have their main activity in every EU-25 country as well as in the candidate and EFTA countries.

PART 3. RECENT OUTCOMES OF THE TELECOMMUNICATIONS SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2005	UNI-Europa Telecom/ETNO Good practice guidelines for the prevention of musculo-skeletal disorders within the telecommunications sector		
2004		UNI-Europa Telecom/ETNO Guidelines on customers' contact centres	
2003	UNI-Europa Telecom/ETNO Joint statement on European union enlargement		

3.1 Anti-discrimination

A 2004 survey ascertaining the extent to which telecommunications companies across the EU employ policies to combat discrimination and encourage diversity in the workplace according to gender, ethnicity, age, disability, sexual orientation and religion/belief, led to the social partners concluding that companies could take much more action on combating discrimination especially in terms of setting targets and devising activities to encourage diversity.

In 2005, the telecom social partners completed an initial audit of company practice and policies on diversity, and the sectoral social dialogue committee is currently developing a project plan to publish details of the good practices identified, including a seminar to share this information and to encourage companies to adopt these preferred methods.

3.2 Economic and sectoral policies

ETNO and UNI-Europa Telecom organise regular exchanges on the economic and social evolution of their sector. For example, in 2001, they organised a seminar on human resources and social implications of the liberalisation of European telecommunications markets and the privatisation of European telecommunications companies. In 2003, a further conference was organised on social dialogue and business restructuring.

3.3 Integrating organisations from the new Member States and the candidate countries

The social partners in telecommunications have debated important questions relating to enlargement during the above seminar in 2003 during which a declaration was adopted. In this text, ETNO and UNI-Europa Telecom committed to use all opportunities to develop, integrate and enhance social dialogue between the partners from the enlarged EU.

3.4 Telework

Discussions between the ETUC, UNICE/UAEPME and CEEP led to a framework agreement on telework being signed in 2002. Prior to this cross-industry agreement, the telecom social partners adopted guidelines for telework that highlighted issues including the voluntary nature of telework, the principle of equitable treatment with other employees the costs involved, the equipment needed and confidentiality. The guidelines are monitored and a survey of large company respondents has already been completed.

3.5 Training and lifelong learning

In 2000 the sectoral social dialogue committee adopted a declaration on new work organisation and skills for transformation, growth and competitiveness in the information society. This declaration made a commitment to raising awareness of information technologies and developing pan-European qualifications and training to support skills development. This activity was strengthened by a conference in 2001 and the social partners are now exploring mechanisms to encourage women and young people into the sector as well as highly skilled third country nationals.

3.6 Working conditions

In 2004 ETNO and UNI-Europa Telecom adopted guidelines for the telecom companies and unions, which employ people in customer contact centres (call centres). The guidelines addressed the need to maintain and encourage excellent employment conditions in the centres, including training, management, health and safety, discussions on strategy, work organisation, diversity, collective rights and respect of core labour standards.

3.7 Current work programme

The telecommunications sectoral social dialogue committee is currently examining issues such as training, health and safety (in particular musculo-skeletal disorders), diversity, CSR, restructuring and enlargement.

Temporary work

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

Temporary Agency Work (TAW) cuts across NACE sector classifications and refers to situations where workers are employed by an agency, and then, via a commercial contract, hired out to perform work assignments at a user enterprise.

1.2 Employment and enterprise

In 2002 TAW in the EU-15 comprised a daily average 2.8 million workers working with 20 000 firms. The labour market share and the gender profile of TAW vary significantly between Member States, depending on the legal approach adopted. The general profile of temporary agency workers is low-skilled and blue-collar. The temporary agency work sector in most EU Member States is dominated by large enterprises, in particular multinational corporations. However, in some specific and specialised segments of the market, the enterprise's size may be smaller.

1.3 Challenges and perspectives

In 1997, the International Labour Organisation (ILO) revised the fee-charging employment agencies convention of 1949 (No. 96), effectively abandoning its restrictive policies toward private employment agencies and the revised text encourages their effective operation. Since then the sector has grown steadily and this is likely to continue although annual changes are highly responsive to business cycles. At EU level, two draft Directives on services in the internal market and on temporary work might have an important impact on the development of the sector.

PART 2. THE SOCIAL PARTNERS OF THE TEMPORARY AGENCY WORK SECTORAL SOCIAL DIALOGUE COMMITTEE

The sectoral dialogue committee for temporary agency work has been effective since 2000.

2.1 Workers' organisations

- **UNI-Europa** is a part of Union Network International (UNI) and represents around 1 000 trade unions in 140 countries and is responsible for social dialogue with the corresponding employers' organisations in numerous areas of activity in the service sector, including temporary agency work. The Information, Business and Information Technology Services (IBITS) section has responsibility for the temporary agency work sector. It has no members in Greece or in the new Member States.

2.2 Employers' organisation

- **Euro-CIETT** represents the employers' side within the committee. Euro-CIETT is the European organisation of the International Confederation of Private Employment Agencies (CIETT). Euro-CIETT represents the national agency work federations in the EU-25, Norway, Romania and Switzerland. It also includes six corporate members (Adecco, Kelly Services, Manpower, Randstad, Vedior and USG). Euro-CIETT has no members in the Baltic States, Cyprus, Hungary, Malta, Slovakia and Slovenia.

PART 3. RECENT OUTCOMES OF THE TEMPORARY AGENCY WORK SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2001	Joint Declaration: Objectives of the European Directive on Private Agency work		

The temporary agency work sectoral social dialogue was suspended between July 2000 and June 2001 following cross-industry negotiations on a framework agreement on temporary work. These negotiations did not lead to any agreement, and the sectoral social dialogue resumed in order to negotiate a joint opinion on the aims of the Commission's draft Directive on temporary work.

3.1 Working conditions

A text was signed in October 2001 in which Euro-CIETT and UNI-Europa support a legal framework for TAW that takes into account the balance necessary between flexibility and the safety of workers. In this joint opinion the social partners insisted on the need for training opportunities for temporary agency workers, on the equal treatment principle, on the promotion of social dialogue and on the role of temporary agency work for disadvantaged groups. It specifically focussed on recommending the promotion of trade union rights and that agency workers are not used to replace workers on strike and that employment laws are applied to them.

3.2 Current work programme

In their ongoing work programme, Euro-CIETT and UNI-Europa have further developed the principles in the 2001 joint opinion. In particular, they intend to set up a study on measures enacted by the EU-25 Member States and the candidate countries, aimed at integrating disadvantaged categories of workers in the labour market through temporary agency work. In order to respond to the challenge of enlargement, the temporary agency work social partners intend to organise round tables in the new Member States.

Textiles and clothing

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classifications 17 and 18 most closely cover the sector and include the manufacturing and production of textiles and clothing.

1.2 Employment and enterprise

The EU-25 (2004) employs 2.6 million workers in the textile and clothing sector. 88% of the workers have an employee status and full-time work predominates (89%). 67% of these workers are women. 92% of the workforce has a low or intermediate education level.

In 2002, 224 000 enterprises were active in the EU-25 textile and clothing industry. The sector is predominantly based on small and medium-sized enterprises. Enterprises of less than 50 employees account for 60% of the workforce in the EU clothing sub-sector.

1.3 Challenges and perspectives

The sector of textiles and clothing is undergoing restructuring deriving from the globalisation of markets, deregulation, trade liberalisation and technological change. As a labour intensive sector, the textiles and clothing industry faces competition from low labour cost countries. The elimination of the quota system within the World Trade Organisation from January 2005 (which had been applied for the past four decades) also implies major restructuring. However, innovation, technology content, quality and creativity ensures the industry remains competitive in niche markets such as technical/industrial textiles and non-wovens as well as for high-quality garments with high design content.

Following the adoption by the Commission of the 2003 Communication on the future of the textile and clothing sector in the enlarged EU, a high-level group was set up with the aim of formulating concrete proposals to improve the competitiveness of the European textiles and clothing industry.

PART 2. THE SOCIAL PARTNERS OF THE TEXTILES AND CLOTHING SECTOR

ETUF:TCL and EURATEX had been working together in an informal working party since 1992 and now participate in the committee which was established in 1999 when the internal rules of procedure were adopted.

2.1 Workers' representatives

- The **European Trade Union Federation: Textile, Clothing, and Leather** represents 70 trade unions in 40 European countries and has at least one member in each Member State, with the exception of Luxembourg. ETUF:TCL represents more than 1.2 million workers and is a member of the ETUC and the International Textile, Garment and Leather Workers' Federation (ITGLWF).

2.2 Employers' representatives

- **EURATEX** represents members in 21 of the 25 EU Member States. It is not represented in Cyprus, Hungary, Luxembourg and Malta, but has members in Morocco, Norway, Switzerland and Turkey. EURATEX is member of the International Apparel Federation.

PART 3. RECENT OUTCOMES OF THE TEXTILES AND CLOTHING SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2004	Handbook on public procurement		
2002	Guide to best practice on equal opportunities		

3.1 Gender equality

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

3.2 Integrating organisations from the new Member States and the candidate countries

EURATEX and ETUF:TCL regularly organise joint social and economic fora with the objective of addressing the social and economic impact of enlargement on their sector and to enhance social dialogue in the new Member States and candidate countries. These took place in 2002 and 2004,with a further one scheduled for 2006. A seminar on social dialogue and fundamental rights was also organised in Turkey in 2000. EURATEX and ETUF:TCL (together with COTANCE) also launched in 2005 an integrated project of capacity building of social partners of the textiles/clothing, leather/tanning and footwear sectors in the new Member States and candidate countries.

3.3 Public procurement

In order to promote the selection of best value in public procurement, relating to textiles and clothing supplies, the sectoral social dialogue committee published a handbook in 2004 for organisations awarding such contracts. The aim is to promote transparency and quality criteria. The guide is currently disseminated in the European Union through national seminars.

3.4 Training and lifelong learning

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

3.5 Working conditions

One of the most significant outcomes of the textiles and clothing sectoral social dialogue committee is the 1997 code of conduct in which the social partners call on their members to actively encourage companies and workers in their sector to comply with the ILO conventions dealing with the core labour standards. In this framework, the social partners, together with the ILO, launched a training project in Turkey in 2004, targeting managers and workers of about ten companies. The social partners are currently discussing the possibility of including, as signatories to the code, partners from non-EU countries and the possibility of extending the transposition of the code into national collective agreements.

3.6 Current work programme

The sectoral social dialogue committee is currently working on vocational training, enlargement and restructuring. It closely follows trade issues concerning their sector, such as the abolition of quotas, market access of EU products in third countries, marking of origin and the social dimension of trade The sectoral social dialogue committee also discuss industrial and social measures aimed at improving the competitiveness of the sector, with an emphasis on the implementation of the recommendations of the high-level group and on the follow-up of the Commission's Communication 'The future of Textile and Clothing sector after 2005'.

Woodworking

PART 1. INDUSTRY AND EMPLOYMENT CHARACTERISTICS

1.1 Sector classification

The NACE classification 20 most closely covers the sector.

1.2 Employment and enterprise

The European Union (2004) employs 1.4 million workers in the woodworking industry. 83% of the woodworking workers have an employee status and full-time work is predominant (94%). 84% of these workers are men. 92% of the workforce has a low or intermediate education level. The woodworking industry includes 131 000 enterprises in the European Union and these are mostly small and medium-sized enterprises.

1.3 Challenges and perspectives

Among the competitive strengths of the sector are the strong technology, know-how and skill base, and the proximity and access to one of the world's largest markets. Competitive weaknesses relate to the EU lack of 'wood culture', and to high factor costs, causing low profitability although labour productivity has been rising, largely through increased use of automation and information technology. The industries main opportunities lie in expanding the use of wood, since the main internal threat is the increasing substitution by other materials. Other advantages may be obtained from geographic clustering and other synergies between sub-sectors, as well as from participating in the supply chains from cost-competitive regions.

PART 2. THE SOCIAL PARTNERS OF THE WOODWORKING SECTOR

2.1 Workers' representatives

- The **European Federation of Building and Woodworkers (EFBWW)** represents 50 affiliated trade unions in the EU-25 with 2 300 000 members. It has no members in Cyprus, Estonia, Greece, Lithuania and Malta. EFBWW is a member organisation of the European Trade Union Confederation (ETUC).

2.2 Employers' representatives

- The **European Confederation of Woodworking Industries (CEI-Bois)** represents members in all the Member States except Cyprus, the Czech Republic, Greece, Ireland, Luxembourg, Malta and Poland and also has members in Norway and Switzerland.

PART 3. RECENT OUTCOMES OF THE WOODWORKING SECTORAL SOCIAL DIALOGUE

	Joint opinions, declarations, tools, procedural texts	Process-oriented texts	Agreements
2003	Biomass combustion beyond reasonable limits		

3.1 Sustainable development

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

In June 2003, CEI-Bois and EFBWW signed a joint declaration on biomass, which, among other things, opposed any hasty policy relating to the incineration of biomass in excess of reasonable limits and offered to cooperate with all parties concerned to develop the best possible solution to the problem of climate change.

3.2 Working conditions

A major outcome of the woodworking sectoral social dialogue committee is the signature in March 2002 of a code of conduct that calls for the active encouragement of companies and workers to comply with the ILO conventions dealing with the core labour standards.

3.3 Current work programme

The social partners are currently working on issues related to vocational training and health and safety, as well as debating questions related to the competitiveness and development of the sector.

European Commission

Recent developments in the European Sectoral Social Dialogue

Luxembourg: Office for Official Publications of the European Communities

2006 – 92 pp. – 21 x 29.7 cm

ISBN 92-79-00242-2

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KE-70-05-625-EN-C

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Publications Office
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ISBN 92-79-00242-2

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