

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Construction sector



Representativeness of the European social partner organisations: Construction sector



When citing this report, please use the following wording:

Eurofound (2024), *Representativeness of the European social partner organisations: Construction sector*, Sectoral social dialogue series, Dublin.

Authors: Georg Adam (FORBA) and Peter Kerckhofs (Eurofound)

Research managers: Peter Kerckhofs, with the support of Maria Sedlakova

Eurofound project: Representativeness studies (170203)

Provider: Network of Eurofound Correspondents (see Annex 3)

PDF: ISBN 978-92-897-2451-7 doi:10.2806/8265330 TJ-01-24-014-EN-N

This report and any associated materials are available online at <https://eurofound.link/ef23027>

It is part of Eurofound's Sectoral social dialogue series. See the full series at <https://eurofound.link/efs006>

© European Foundation for the Improvement of Living and Working Conditions, 2024

Reproduction is authorised provided the source is acknowledged.

For any use or reproduction of photos or other material that is not under the Eurofound copyright, permission must be sought directly from the copyright holders.

Cover image: © Andreas Karelias/Adobe Stock

Any queries on copyright must be addressed in writing to: copyright@eurofound.europa.eu

Research carried out prior to the UK's withdrawal from the European Union on 31 January 2020, and published subsequently, may include data relating to the 28 EU Member States. Following this date, research only takes into account the 27 EU Member States (EU28 minus the UK), unless specified otherwise.

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

European Foundation for the Improvement of Living and Working Conditions

Telephone: (+353 1) 204 31 00

Email: information@eurofound.europa.eu

Web: www.eurofound.europa.eu

Contents

Introduction.....	1
0.1. Objectives of the study	1
0.2. Historical background	2
0.3. Definitions and methodology	6
0.4. Data collection and quality control measures	9
0.5. Structure of the report	10
1. Economic background and employment specificities in the sector.....	11
1.1. Employment in the construction sector	12
1.2. Changes in employment	16
1.3. Main characteristics of employment in the sector	18
1.4. Companies in the construction sector and economic development	21
1.5. Pandemic effects	34
2. National level of interest representation	35
2.1. Construction sector coverage, membership domain and organisational density of trade unions....	36
2.2. Trade union involvement in collective bargaining	53
2.3. Trade union involvement in social dialogue and consultation practices	62
2.4. Construction sector coverage, membership domain and organisational density of employer organisations and business associations	65
2.5. Employer organisations' and business associations' involvement in collective bargaining	88
2.6. Involvement of employer organisations and business associations in social dialogue and consultation practices	95
2.7. The system of sector-related collective bargaining.....	98
2.8. Participation in tripartite and bipartite social dialogue bodies	100
2.9. Participation in paritarian organisations	118
2.10. Fragmentation and pluralism in the construction sector	126
2.11. Industrial relations system in the construction sector in Germany.....	129
2.12. Industrial relations system in the construction sector in France.....	130
3. European level of interest representation	135
3.1. Membership domain of the EFBWW	135
3.2. Membership domain of the FIEC	140
3.3. Representativeness of the EFBWW and the FIEC	147
3.4. National trade unions not represented by the EFBWW	151
3.5. National employer organisations not represented by the FIEC.....	153
3.6. Other European trade union associations	154
3.7. Other European employer organisations and business associations	155
3.8. Membership domain of the EBC.....	158
3.9. Capacity to negotiate of the EFBWW, the FIEC and the EBC.....	162
3.10. Effective participation	167
3.11. Representation of social partners in the AEIP	168
4. Conclusions	170
Economic background and employment trends	170
National level of interest representation	170
Collective bargaining	172
Social dialogue and consultation.....	172
European level of interest representation	173

References..... 175
Annexes..... 176
Annex 1: List of national trade unions176
Annex 2: List of national sectoral employer organisations178
Annex 3: Network of Eurofound Correspondents.....182

List of tables

Table 1: Number of joint texts adopted by the construction European social partners.....	4
Table 2: Joint texts by their type	4
Table 3: Demarcation of the construction sector based on NACE codes.....	6
Table 4: Domain patterns of the membership of an organisation	7
Table 5: People employed in the construction sector in the EU, 2019	12
Table 6: People employed in the construction sector in the EU, 2020	13
Table 7: Employment in NACE codes 41, 42 and 43 (% of the sectoral workforce), 2020.....	14
Table 8: Absolute and relative change in sectoral employment, 2011–2020.....	17
Table 9: Share of employees out of total people employed (%).....	18
Table 10: Employee representation and role of trade unions in EU27 construction companies	20
Table 11: Number and share of companies in the construction sector and average number of workers per company, 2020	22
Table 12: Number and share of companies and workers in the three subsectors, and average workforce size per company, 2020	24
Table 13: Companies in construction and each subsector, by size group (number and share of total), 2019–2020.....	25
Table 14: Total construction sector companies, share by size group and average employees per company, 2020	26
Table 15: Relative importance of large companies in the sector	27
Table 16: Subsectoral coverage, number of employees, trade union presence, affiliation to employer organisations and collective bargaining application of the three largest (in terms of number of employees) construction companies per country.....	28
Table 17: Number of sector-related organisations per country, 2021.....	35
Table 18: Sector coverage of the construction sector trade unions, 2021	36
Table 19: Construction sector trade unions’ domain coverage in terms of worker categories, 2021 .	41
Table 20: Construction sector trade unions’ domain coverage in terms of company size, 2021	44
Table 21: Trade union membership strength and organisational density in the construction sector, 2021	48
Table 22: Cumulative trade union organisational density in the construction sector, 2021	52
Table 23: Collective bargaining involvement of construction sector trade unions and subsector coverage, 2021	54
Table 24: Collective bargaining involvement of construction sector trade unions and coverage in terms of type/category of workers, 2021	57
Table 25: Collective bargaining involvement of construction sector trade unions and coverage in terms of company size classes, 2021.....	60
Table 26: Involvement of construction sector trade unions in social dialogue and consultation practices, 2021	63
Table 27: Sector coverage of the construction sector employer organisations and business associations, 2021	65
Table 28: Coverage in terms of company size classes of the construction sector employer organisations and business associations, 2021.....	70
Table 29: Company size classes contributing the largest proportion of membership fees to the construction sector employer organisations and business associations, 2021	74

Table 30: Membership structure of construction sector employer organisations and business associations, 2021	77
Table 31: Employer organisations' and business associations' membership strength in total and disaggregated by company size classes in construction, 2021	80
Table 32: Employer organisations' and business associations' organisational density in terms of workers employed by member companies in the construction sector, 2021	85
Table 33: Collective bargaining involvement of construction sector employer organisations and subsector coverage, 2021	89
Table 34: Collective bargaining involvement of construction sector employer organisations/ business associations and coverage in terms of company size classes, 2021	92
Table 35: Involvement of construction sector employer organisations and business associations in social dialogue and consultation practices, 2021	96
Table 36: Collective bargaining in the construction sector (number and % of total), 2021	99
Table 37: Type of collective bargaining by Member State, 2021	99
Table 38: Collective bargaining coverage by type of bargaining, 2021	100
Table 39: Tripartite and bipartite social dialogue bodies in which sector-related issues are dealt with, and social partner participation, 2021	109
Table 40: Paritarian organisations in construction, their origin, activities and coverage, and social partner participation, 2021	120
Table 41: Reasons for organisational fragmentation and pluralism on the trade union side in the construction sector, 2021	126
Table 42: Reasons for organisational fragmentation and pluralism on the employer organisation and business association side in the construction sector, 2021	128
Table 43: Membership strength of FFB and CAPEB in different company size groups	133
Table 44: Types of collective bargaining agreements in the construction sector in France	134
Table 45: Affiliation of sector-related trade unions to the EFBWW, 2021	136
Table 46: Cumulative sector coverage of EFBWW member trade unions per country, 2021	138
Table 47: Cumulative coverage in terms of company size of EFBWW member trade unions per country, 2021	139
Table 48: Affiliation of sector-related employer organisations and business associations to the FIEC,* 2021	142
Table 49: Cumulative sector coverage of FIEC member organisations per country, 2021	144
Table 50: FIEC member organisations' coverage and relative strength in terms of company size classes, and importance of company size classes for contributing membership fees, 2021	146
Table 51: Membership structure of the EFBWW and the FIEC, 2021	148
Table 52: Organisational capacity of the EFBWW, based on the involvement of its member organisations	149
Table 53: Organisational capacity of the FIEC, based on the involvement of its member organisations	150
Table 54: Construction sector trade unions affiliated to other European associations, 2021	155
Table 55: Construction sector employer organisations and business associations affiliated to the FIEC* and other European associations except the EBC, 2021	156
Table 56: EU associations other than the FIEC and the EBC with construction sector national employer organisations and business associations as members, 2021	157
Table 57: Affiliation of sector-related employer organisations and business associations to the EBC, 2021	159

Table 58: Cumulative sector coverage of EBC member organisations per country, 2021	160
Table 59: EBC member organisations’ coverage and relative strength in terms of company size classes, and importance of company size classes for contributing membership fees, 2021	161
Table 60: Joint documents produced by the construction ESSDC, 1996–2021.....	165
Table 61: Effective participation.....	168
Table 62: National correspondents who have contributed to this study.....	182

List of figures

Figure 1: Joint texts per year of adoption	4
Figure 2: Thematic distribution of joint texts by European social partners in the construction sector	5
Figure 3: Four types of sector-relatedness.....	7
Figure 4: Employment in NACE codes 41, 42 and 43 (% of the sectoral workforce), 2020.....	15
Figure 5: Number of people employed in the construction sector in the EU, 2011–2020	16
Figure 6: Absolute and relative change in construction sector employment, 2011–2020	17
Figure 7: Number of companies in the construction sector in the EU, 2011–2020	21
Figure 8: Share of companies in the three subsectors (%), 2020	23
Figure 9: Share of employment in the three subsectors (%), 2020.....	23
Figure 10: Share of companies by company size (number of people employed) (%), 2019	24
Figure 11: Share of employment by company size (%), 2020	25
Figure 12: Turnover or gross premiums written (million euro), 2011–2020	34
Figure 13: Distribution of membership domain patterns of sector-related trade unions in construction (%), 2021	39
Figure 14: Involvement of construction sector trade unions in different forms of collective bargaining (%), 2021	62
Figure 15: Distribution of membership domain patterns of sector-related employer organisations/business associations in construction, 2021.....	69
Figure 16: Involvement of construction sector employer organisations/business associations in different forms of collective bargaining (%), 2021	95
Figure 17: Scoreboard of the representativeness of the EFBWW in the construction sector	136
Figure 18: Scoreboard of the representativeness of the FIEC in the construction sector	141
Figure 19: Scoreboard of the representativeness of the EBC in the construction sector	158

Country codes

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

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners – that is, the trade unions and employer organisations – in the construction sector and to show how they relate to the sector’s European-level organisations representing employees and employers.

The report is divided into three parts: an overview of the economic specificities of and the employment trends in the construction sector; an analysis of the social partner organisations in the 27 EU Member States (EU27); and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate. This study takes 2021 as the year of reference.

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the construction sector, which was established in its current form in 1999.

0.1. Objectives of the study

Representativeness studies are conducted for three reasons.

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

Beyond these three formal reasons based on Articles 154 and 155 of the TFEU and on Commission Decision 98/500/EC of 1998, the assessment of representativeness in this study allows organisations to identify opportunities for capacity building (in terms of active participation in European social dialogue) – for example the national sectoral organisations listed in Sections 3.6 and 3.7 that are not represented in the ESSDC by either the European Federation of Building and Wood Workers (EFBWW) or the European Construction Industry Federation (FIEC). In comparison with the 2015 Eurofound representativeness study for the construction sector, changes in the industrial relations in the sector can be observed. The findings can also help to clarify the importance of social partner organisations for social dialogue coordinators in other directorates-general (as set out in Section 3.3 of the Commission communication of 25 January 2023 on strengthening social dialogue in the European Union) and provide support for applications for project funding.

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

- to relate to specific sectors or categories and be organised at European level

- to consist of organisations that are themselves an integral and recognised part of Member States' social partner structures, have the capacity to negotiate agreements and are representative of several Member States
- to have adequate structures to ensure its effective participation in the work of the sectoral social dialogue committees

To accomplish its aim, the study first identifies the relevant national social partner organisations in the construction sector, before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the sector-relatedness of both the national and European levels of interest representation. The study includes only organisations whose membership domain is classed as 'sector-related' – that is, trade unions and employer organisations that have members in the sector and that are part of sectoral industrial relations through being involved in sector-related collective bargaining, social dialogue and/or consultation over sector-related policies. In terms of territorial coverage, the study covers the EU27.

A specific objective of this study is the assessment of the FIEC and the EFBWW, the European social partner organisations currently involved in the ESSDC for the construction sector, and to what extent both the large companies in the sector and the small and medium-sized enterprises (SMEs) and microfirms are represented. In addition, it aims to assess these in comparison with the representativeness of the European Builders Confederation (EBC) for the employers of mainly SMEs and microfirms. A detailed analysis of the representativeness of trade unions and employer organisations among the three largest companies in each Member State can be found in Table 16. For the different size groups, the analyses of the national sectoral trade unions are given in Tables 20 and 21; for the national sectoral employer organisations, these are given in Tables 28, 29, 31 and 32.

0.2. Historical background

There are two officially recognised European social partners in the construction sector, both of which have a long history. Employer organisations are represented by the FIEC, established in 1905. Workers' organisations are represented by the EFBWW, operating since 1958.

The two organisations started having regular meetings in 1983 on issues such as the introduction of new technologies and employee training (Lubanski, 2000). According to Nikolaj Lubanski (2000), the construction sector was strongly embedded in national and local economic settings. With the implementation of the single market, this gradually changed, as it brought a process of Europeanisation through the free movement of people and services and the liberalisation of public procurement. Companies expanded their home markets into neighbouring countries through mergers or takeovers and by increasing the work carried out across frontiers, while simultaneously the movement of labour was facilitated (Druker and Dupre, 1998). In this context, the 1996 Posting of Workers Directive and national regulations on the working conditions of expatriated employees are important for the sector (Lubanski and Sörries, 1997), while trade unions are more closely tied to the specific national area of their membership domain (Ahrne, 1990). Related case law of the European Court of Justice appeared in Case C-133/89, when Rush Portuguesa, a Portuguese construction company, had been subcontracted to build a railway line in France with Portuguese workers. Some of these rulings were controversial, as they interpreted employment contract aspects of the 1980 Convention on the Law Applicable to Contract Obligations. At the global level, the International Labour Organization's Sectoral Policies Department has undertaken research on

emerging labour issues in the construction sector, while the European Commission published the Atkin report on the construction sector (Atkin International, 1993).

When the European Commission started to inform social partners of an initiative related to the Social Charter of 1989, the FIEC and the EFBWW took part in meetings, which resulted in informal social dialogue meetings in March 1990 and three or four regular meetings in subsequent years (Lubanski, 2000). A first joint declaration was reached at the beginning of 1992 as a common input to the decision-making process regarding Council Directive 92/57/EEC on the implementation of minimum safety and health requirements at temporary or mobile construction sites. A second European social partner joint declaration by the FIEC and the EFBWW was made regarding the planned Posting of Workers Directive in 1993 (Lubanski, 2000).

The ESSDC for the construction sector was officially established six years later in 1999 and covers three Nomenclature of Economic Activities (NACE) (Rev. 2) areas: construction of buildings (41), civil engineering (42) and specialised construction activities (43) (European Commission, undated). Founded in 1990, the EBC has been invited to participate in the social dialogue meetings within the delegation led by the FIEC,¹ following the first request for direct participation in 2005.

The ESSDC has established three working groups: one on labour market issues, one on health and safety matters, and a third one on youth and vocational training.

The past two decades of European social dialogue in the construction sector point to relatively stable and productive cooperation between the two officially recognised social partners, with 41 joint texts adopted between 1996 and 2024 (see Table 1). After the official formation of the ESSDC in the sector, the number of adopted joint texts reached its peak in 2003 when the FIEC and the EFBWW agreed on six joint texts² in the areas of tutorship, the entry and residence of third-country nationals, Directive 2001/45 on working at heights, and health and safety issues. In 2004, this number dropped to four joint texts per year. The activities of the social partners, measured by the number of adopted joint texts, increased again around 2010–2012 due to the crisis-induced issues in the construction sector (for example, the joint opinion *Emerging from the crisis: Fostering growth and jobs for a sustainable construction industry* and *Joint conclusions and recommendations of the European social partners in the construction industry on self-employment and bogus self-employment*) and various discussions about the Posting of Workers Directive.³ Since 2017, the social partners have adopted on average one text per year, except in 2019, when they did not produce any joint texts (see Figure 1). The vast majority of texts are joint opinions (30 documents), followed by declarations and tools (4 documents each) (Table 2; see also Table 60 in Section 3.9). Having requested direct involvement as a European employer organisation in 2005, the EBC has been invited to attend the ESSDC meetings⁴ as part of the FIEC delegation but is not a signatory party to any of the joint texts concluded by the FIEC and the EFBWW.

¹ For more information about EBC members, see <https://www.ebc-construction.eu/about-us/members/>

² However, three texts relate to the same thematic area: guidance on best practices on the coordination of health and safety.

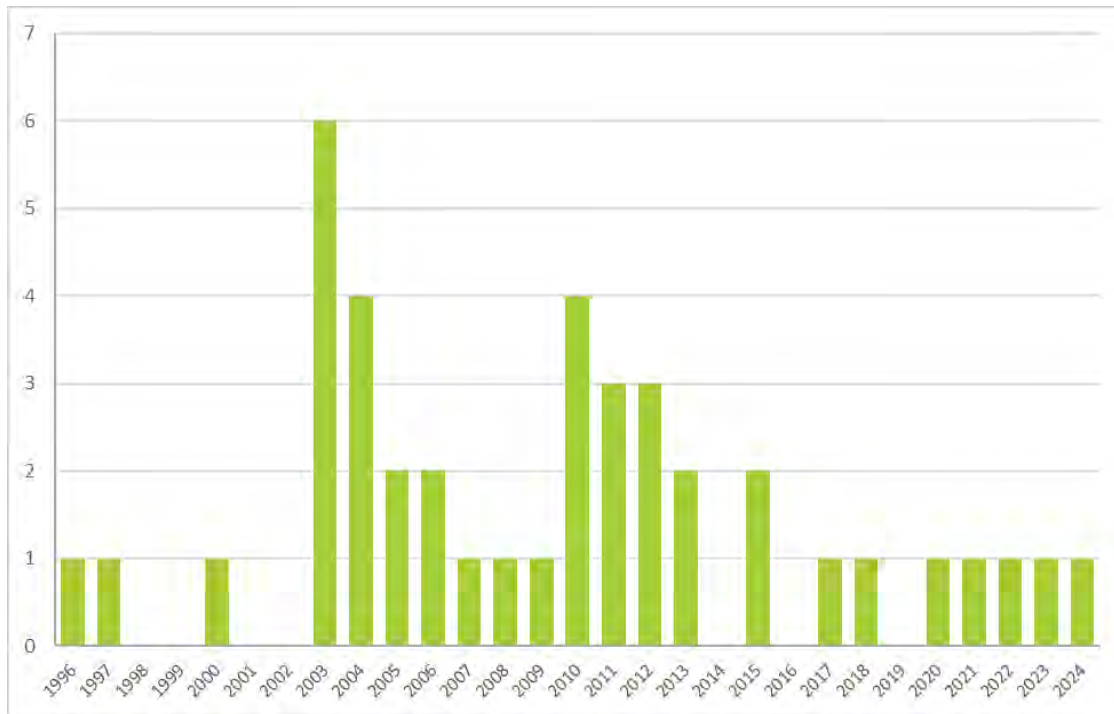
³ Directive 96/71/EC (the Posting of Workers Directive) was amended in 2018 by Directive (EU) 2018/957.

⁴ The EBC indicates that it is invited only to the plenary parts of the meetings with trade unions, not to the internal discussions of the employer organisations' delegation. The EBC also indicates that it was not always invited. The FIEC acknowledges that occasionally it might have forgotten to invite the EBC, but for most of the meetings, the EBC was invited. The EBC would have liked to be involved more.

Table 1: Number of joint texts adopted by the construction sector European social partners

Period	Years when joint texts were adopted	Number of adopted texts in this period
Informal dialogue: 1992–1998	1996, 1997	2
First decade of formal ESSDC: 1999–2008	2000, 2003, 2004, 2005, 2006, 2007, 2008	17
2009–2018	2009, 2010, 2011, 2012, 2013, 2015, 2017, 2018	17
2019–2024	2020, 2021, 2022, 2023, 2024	5
Total		41

Figure 1: Joint texts per year of adoption



Sources: European Commission, Social Dialogue Texts Database, and own update

Table 2: Number of joint texts by type

Type of document	Count
Declaration	4
Joint opinion	30
Policy orientations	1
Procedural text	2
Tool	4
Total	41

Source: European Commission, Social Dialogue Texts Database

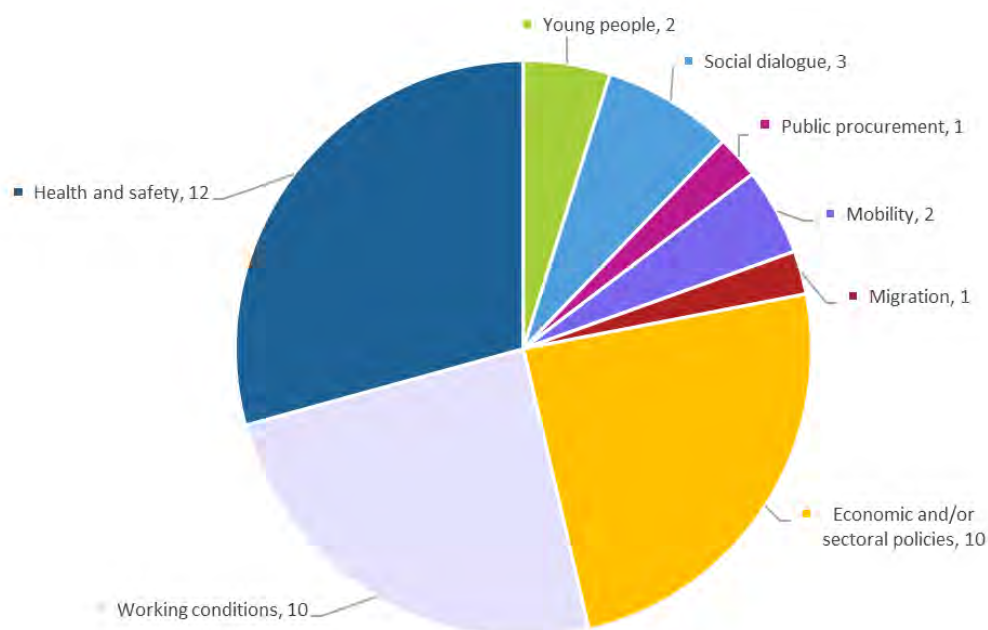
In the Pact for Skills, the EFBWW and the FIEC have cooperated with the EBC. The Pact for Skills is an initiative by the European Commission in which the EFBWW, the FIEC and the EBC have cooperated since February 2022. It aims to mobilise a concerted effort among private and public partners for

quality investment in vocational education and training and knowledge, skills and competencies for all working age people across the EU. The signatories have committed to support the aim of 3.8 million people participating in upskilling and reskilling across the construction ecosystem each year by 2030.

From January 2019 to March 2023, the EFBWW, the FIEC and the EBC cooperated in the Erasmus+-funded initiative Construction Blueprint, which released a joint statement entitled ‘A new sectoral strategic approach to cooperate on skills in the construction industry’ in February 2023. This joint statement was signed by the EFBWW, the FIEC and the EBC; it is, however, not considered part of the outcome of the ESSDC. The joint texts reached in the ESSDC are listed in Table 60.

The three most important themes for European social dialogue in the construction industry are health and safety issues (12 joint texts), working conditions (10) and economic and/or sectoral policies (10). Some texts tackle issues related to young people in the sector, mobility, social dialogue, public procurement and migration (see Figure 2). A complete list of joint texts is given in Table 60 in Section 3.9.

Figure 2: Thematic distribution of joint texts by European social partners in the construction sector



Source: European Commission, Social Dialogue Texts Database

Among the recent joint opinions are the 2023 memorandum of understanding on the sustainable reconstruction of Ukraine and a joint declaration on the EU Strategic Framework on Health and Safety at Work 2021–2027. In 2024, the 2024–2027 work programme was agreed as a procedural text. Back in 2020 and 2021, there were joint opinions on the COVID-19 pandemic and migration. As early as April 2020, social partners adopted a joint recommendation to counteract the negative impact and consequences of the COVID-19 crisis for the construction industry, addressed to the national, regional and local social partner organisations. The EFBWW and the FIEC stressed the importance of continuity of production and open borders for construction work, while adhering to

the national health and safety and hygiene standards and regulations. They urged national employer and workers' organisations to negotiate jointly and with the national/regional/local authorities, to which they addressed several practical recommendations on the coordinated resumption of sectoral activities (EFBWW and FIEC, 2020). In the joint opinion from 2021 addressed to the EU and national institutions, the EFBWW and the FIEC expressed support for the initiatives for efficient and effective EU migration policy and third-country-national workers and companies in the EU construction market (EFBWW and FIEC, 2021).

While the construction sector continues to deal with the above-mentioned issues, the listed priorities of the ESSDC still focus on issues related to the demographic change and ageing workforce, initiatives for youth employment, vocational training, health and safety, improved and functioning labour markets, and mobility within the single market (European Commission, undated).

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC, including sector-relatedness, membership and organisational capacity. Each of these criteria will be defined successively in this section, starting with sector-relatedness – that is, the demarcation of the construction sector in agreement with the social partners and the European Commission.

Sector-relatedness

In this study, the construction sector is described as covering the following NACE⁵ codes: 41, 42 and 43 (Table 3).

Table 3: Demarcation of the construction sector based on NACE codes

NACE 41	Construction of buildings
41.10	<ul style="list-style-type: none"> Development of buildings projects
41.20	<ul style="list-style-type: none"> Construction of residential (houses and apartment blocks) and non-residential buildings (factories, hospitals, schools, office buildings, hotels, stores, restaurants, airport buildings, sport facilities, garages, warehouses, religious buildings, erection of prefabricated constructions)
NACE 42	Civil engineering
42.11	<ul style="list-style-type: none"> Construction of roads and motorways
42.12	<ul style="list-style-type: none"> Construction of railways and underground railways
42.13	<ul style="list-style-type: none"> Construction of bridges and tunnels
42.21	<ul style="list-style-type: none"> Construction of utility projects for fluids
42.22	<ul style="list-style-type: none"> Construction of utility projects for electricity and telecommunications
42.9	<ul style="list-style-type: none"> Construction of other civil engineering projects
NACE 43	Specialised construction activities
43.11	<ul style="list-style-type: none"> Demolition
43.12	<ul style="list-style-type: none"> Site preparation
43.13	<ul style="list-style-type: none"> Test drilling and boring
43.21	<ul style="list-style-type: none"> Electrical installation
43.22	<ul style="list-style-type: none"> Plumbing, heat and air conditioning installation
43.29	<ul style="list-style-type: none"> Other construction installation

⁵ NACE is the European statistical classification of economic activities – specifically, NACE Rev. 2 (<https://ec.europa.eu/eurostat/documents/3859598/5902521/KS-RA-07-015-EN.PDF>). For the demarcation of a specific sector, reference is made to specific NACE codes.

43.31	<ul style="list-style-type: none"> Plastering
43.32	<ul style="list-style-type: none"> Joinery installation
43.33	<ul style="list-style-type: none"> Floor and wall covering
43.34	<ul style="list-style-type: none"> Painting and glazing
43.91	<ul style="list-style-type: none"> Roofing activities

Source: NACE (Rev. 2)

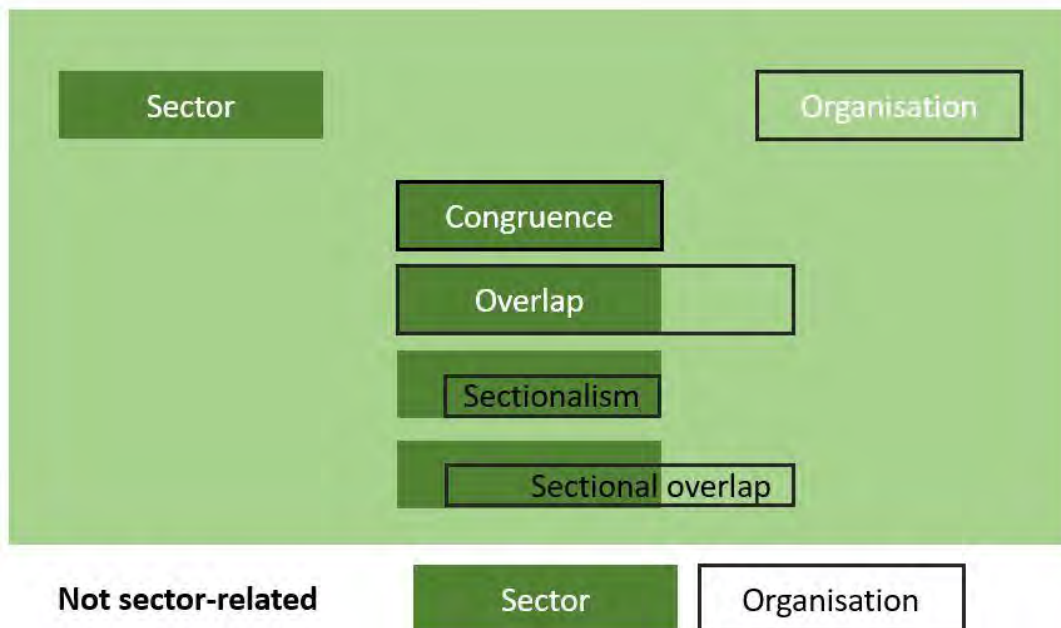
The membership domains of trade unions and employer organisations can strictly correspond to this demarcation of the sector, which is a type of sector-relatedness known as ‘congruence’. If the membership domain of an organisation goes beyond the construction sector as it is described here, that is called an ‘overlapping’ representational domain. An organisation is ‘sectional’ if it covers part of the construction sector and nothing else, whereas ‘sectional overlapping’ describes an organisation that covers part of the construction sector and organises other sectors too (Table 4).

Table 4: Domain patterns of the membership of an organisation

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

Figure 3 presents the four types of sector-relatedness graphically.

Figure 3: Four types of sector-relatedness



Membership

Membership constitutes another important aspect of representativeness. Two dimensions of membership are to be looked at here: first, the geographical coverage of the EU-level organisations (the Member States where the EU-level trade union/employer organisation has affiliates) and, second, the organisational density of the national affiliates.⁶ Moreover, it is important to consider whether the EU-level players organise most of the national-level players, or at least the most significant ones, in terms of density and involvement in sector-related collective bargaining and/or policymaking.

Organisational capacity

The organisational capacity of the European social partners is analysed in terms of their ability to act on behalf of their members and to conclude binding agreements or commit to actions that can be implemented or monitored EU-wide through the support of their affiliates. To complete an assessment of the capacity to negotiate, it is necessary to analyse the organisations: their institutional objectives and decision-making structures, as provided in their statutes; the expected outcomes of the actions, for instance whether their institutional mission includes the possibility of negotiating and coming to agreements with other parties; and the processes through which the organisations obtain a mandate, support and approval from their member organisations in the negotiation process.

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

Finally, representativeness also depends on the structures, resources and capacity of the organisations to mobilise the active participation of their members and aggregate the different interests of member organisations and on their ability to act autonomously at EU level. Effective participation in the ESSDC meetings is assessed in terms of presence at the meetings of the ESSDC in the two-year period before the year of publication of this report.⁷

⁶ Trade union organisation density refers to the proportion of the total number of employees who are members of a trade union. Employer organisation density refers to the proportion of employees in firms who are organised in employer organisations among all employees. Please note that this report presents two types of densities: the sectoral density of an individual union or employer organisation/business association, and cumulative densities aggregating the density of each individual organisation for the whole country.

⁷ More information on the definitions of key terms can be found in Eurofound's Industrial Relations Dictionary, available at <https://www.eurofound.europa.eu/en/european-industrial-relations-dictionary>

0.4. Data collection and quality control measures

Representativeness studies combine top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of the FIEC, the EBC and the EFBWW, while the bottom-up approach looks for the organisations involved in construction sector-related collective bargaining and social dialogue in the EU Member States and their membership of European-level organisations.

Unless otherwise noted, this study draws on the country studies provided by the Network of Eurofound Correspondents (NEC). Where precise quantitative data could not be obtained, estimates were provided rather than leaving a question blank. Thus, quantitative data (used, for example, to calculate the density rates) may stem from three sources:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the organisations (used, for example, to calculate the density rates)
- estimates, expert opinions and assessments made by Eurofound national correspondents or by representatives of the organisations

Other sources used in this report include data and reports published by the European social partners, the European Commission's Social Dialogue Texts Database and the articles of association of the EU-level organisations.

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

First, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the NEC between July and December 2021. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise them between January and April 2022.

An overview of the national contributions was made available to the European social partners, to allow their affiliates to double-check and comment on the information, in May and June 2022. As social partner organisations could see the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information of organisations representing similar membership, this triangulation process included an element of mutual control and recognition.

Draft versions of the overview report were shared with the FIEC, the EBC, the EFBWW and the European Commission in April 2024 for feedback and comments. The final report, taking these comments into consideration, was evaluated and approved in a written evaluation procedure from 14 June 2024 to 10 July 2024 by Eurofound's Advisory Committee on Industrial Relations – which consists of representatives of both sides of industry, governments and the European Commission – in the presence of the European-level sectoral social partners identified in the report.

0.5. Structure of the report

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

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

1. Economic background and employment specificities in the sector

The construction sector, as defined for the purpose of this representativeness study, covers the subsectors NACE 41 (construction of buildings), 42 (civil engineering) and 43 (specialised construction activities). The sector covers many different business activities, all of which are listed in Table 3 in the introduction.

This chapter describes the economic background of the construction sector in terms of employment and company structure. The largest part of the sectoral employment (59.9%) is in specialised construction activities, almost a third (30.0%) is in the construction of buildings and 10.1% is in civil engineering.

Microfirms and SMEs constitute the largest share of companies, in numbers, within the construction sector. The construction sector has an average of four employees per company in the EU27. About 46% of the sectoral workforce is in microfirms (fewer than 10 employees), and companies with fewer than 50 employees cover 74% of the sectoral workforce. The largest companies in the sector, with 250 employees or more, employ 13% of the sectoral workforce (see Figure 11).

Within specialised construction activities (NACE 43) and the construction of buildings (NACE 41), the proportion of microfirms and SMEs is the highest in terms of proportion of the workforce. For civil engineering (NACE 42), larger companies have a relatively higher proportion of the workforce, although SMEs are also present.

The five **largest construction companies**, each having more than 50,000 employees, are ACS from Spain, with around 181,000 employees; FCC from Spain with around 59,000 employees, Bouygues and Vinci from France, with around 66,000 and 55,000 employees, respectively; and Hochtief from Germany, with over 53,000 employees. Very large construction companies with more than 10,000 employees appear only in seven Member States: Austria, France, Germany, Italy, Netherlands, Spain and Sweden. For all other Member States, the three largest construction companies employ less than 5% of the national sectoral workforce.

Given the importance in the sector of microfirms and SMEs on the one hand and larger companies on the other, they are analysed separately in this study. For trade unions, they are assessed in Tables 20 and 21 in the next chapter; for employer organisations, they are covered in Tables 28, 29 and 31. For the trade unions organising the largest companies, and the employer organisations to which they are affiliated, these are included in Table 16 in this chapter.

1.1. Employment in the construction sector

Table 5 shows that the construction sector in the EU employed 12,687,246 people in 2019, which amounted to around 6.8% of the total EU workforce.

With over 2.6 million workers, Germany has the highest number of sectoral employees within the EU, having over 20% of the total construction workforce within the EU27, followed by France (13.9% of the EU construction workforce), Spain (10.5%) and Italy (10.4%). Poland also has a significant share of the sectoral EU workforce, with 8.4%, while the other countries' shares lie below 4%. The six Member States with the largest sectoral workforces – Germany, France, Spain, Italy, Poland and the Netherlands – together employ about 68% of the EU sectoral workforce.

Relative to total national employment, the construction sector represents, for most EU Member States, between 6% and 8% of the entire national workforce. There are only a few Member States where the construction sector workforce is less than 6% of the national workforce. Based on the European Union Labour Force Survey (EU-LFS) data from 2019 in Table 5, this is the case for Greece, Italy, Luxembourg, the Netherlands and Slovenia. Based on the structural business statistics (SBS) data for 2020 in Table 6, this applies in Bulgaria, Greece, Malta and the Netherlands. According to the EU-LFS data from 2019, the seven Member States where it is 8% or more are Austria, Cyprus, Estonia, Latvia, Poland, Romania and Slovakia. The SBS data for 2020 indicate more than 8% of the national workforce is in the construction sector in Cyprus, Estonia, Finland, Latvia, Lithuania and Sweden.

Table 5: People employed in the construction sector in the EU, 2019

Member State	Number of people employed in the construction sector	Share of EU construction sector workforce (%)	Share of national employment (%)
DE	2,643,029	20.8	6.7
FR	1,759,286	13.9	6.7
ES	1,337,009	10.5	6.5
IT	1,319,155	10.4	5.8
PL	1,065,139	8.4	8.0
NL	493,119	3.9	4.6
SE	439,258	3.5	7.1
RO	407,008	3.2	8.5
CZ	381,643	3.0	7.1
PT	353,398	2.8	6.4
BE	335,160	2.6	7.0
AT	328,025	2.6	8.3
HU	271,031	2.1	7.7
FI	211,046	1.7	7.5
DK	182,706	1.4	6.1
SK	179,153	1.4	9.2
IE	158,227	1.2	6.4
BG	156,179	1.2	7.9
EL	142,259	1.1	3.8
HR	119,702	0.9	6.7
LT	113,450	0.9	7.7
SI	73,280	0.6	5.8

Member State	Number of people employed in the construction sector	Share of EU construction sector workforce (%)	Share of national employment (%)
LV	70,252	0.6	9.1
EE	52,179	0.4	9.3
LU	49,028	0.4	5.6
CY	34,381	0.3	9.7
MT	13,144	0.1	6.9
EU27	12,687,246	100.00	6.8

Notes: Green shading indicates a share of national employment of 8% or more; red shading indicates a share of national employment of less than 6%. Member States are ordered by number of people employed (descending); EU-LFS data differ somewhat from SBS data in that they tend to be slightly higher in terms of absolute numbers.

Sources: Eurostat, SBS data for 2019 (number of people employed in the construction sector and share of EU construction sector workforce), and EU-LFS data for 2019 (share of national employment)

Table 6: People employed in the construction sector in the EU, 2020

Member State	Number of people employed in the construction sector	Share of EU construction sector workforce (%)	Share of national employment (%)
DE	2,633,988	20.4	6.6
FR	1,867,592	14.5	7.0
IT	1,355,427	10.5	6.1
ES	1,245,049	9.7	6.6
PL	1,115,455	8.7	7.0
NL	507,931	3.9	5.9
RO	443,896	3.4	5.4
SE	433,441	3.4	8.9
CZ	383,786	3.0	7.5
PT	362,320	2.8	8.0
BE	346,841	2.7	7.3
AT	331,158	2.6	7.8
HU	281,723	2.2	6.4
FI	207,128	1.6	8.5
DK	191,474	1.5	7.0
SK	175,402	1.4	7.0
IE	157,349	1.2	7.1
BG	153,912	1.2	5.1
EL	152,043	1.2	4.0
HR	126,701	1.0	7.8
LT	115,789	0.9	8.9
SI	73,585	0.6	7.6
LV	70,181	0.5	8.2
EE	51,528	0.4	8.4
LU	50,483	0.4	n.a.
CY	36,454	0.3	9.0
MT	14,017	0.1	5.5
EU27	12,884,653	100.0	6.7

Notes: *n.a.* = not available. Green shading indicates a share of national employment of 8% or more; red shading indicates a share of national employment of less than 6%. Member States ordered by number of people employed (descending); EU-LFS data differ somewhat from SBS data in that they tend to be slightly higher in terms of absolute numbers.

Sources: Eurostat, SBS data for 2020 (number of people employed in the construction sector and share of EU construction sector workforce), and EU-LFS data for 2020 (share of national employment)

Table 7 and Figure 4 indicate that the three subsectors (NACE 41: construction of buildings; NACE 42: civil engineering; NACE 43: specialised construction activities) vary greatly in size: specialised construction activities is the largest, with 59.9% of the sectoral workforce within the EU, followed by construction of buildings (30.0%) and civil engineering (10.1%) (EU-LFS data for 2020).

In Table 7, the five Member States for which the proportions for each of the three subsectors are the highest are marked in green; the two or three with the lowest proportions are marked in red. For the construction of buildings, the highest workforce proportions are found in Bulgaria, Cyprus, Estonia, Latvia and Romania, and the lowest in France and Germany. For civil engineering, the highest proportions are in Austria, Croatia, Estonia, Latvia and Lithuania, and the lowest in Italy and Romania. Specialised construction activities have the largest proportion of national sectoral employment in Belgium, Denmark, France, Germany and Sweden, and the lowest in Bulgaria, Latvia and Romania.

Table 7: Employment in NACE codes 41, 42 and 43 (% of the sectoral workforce), 2020

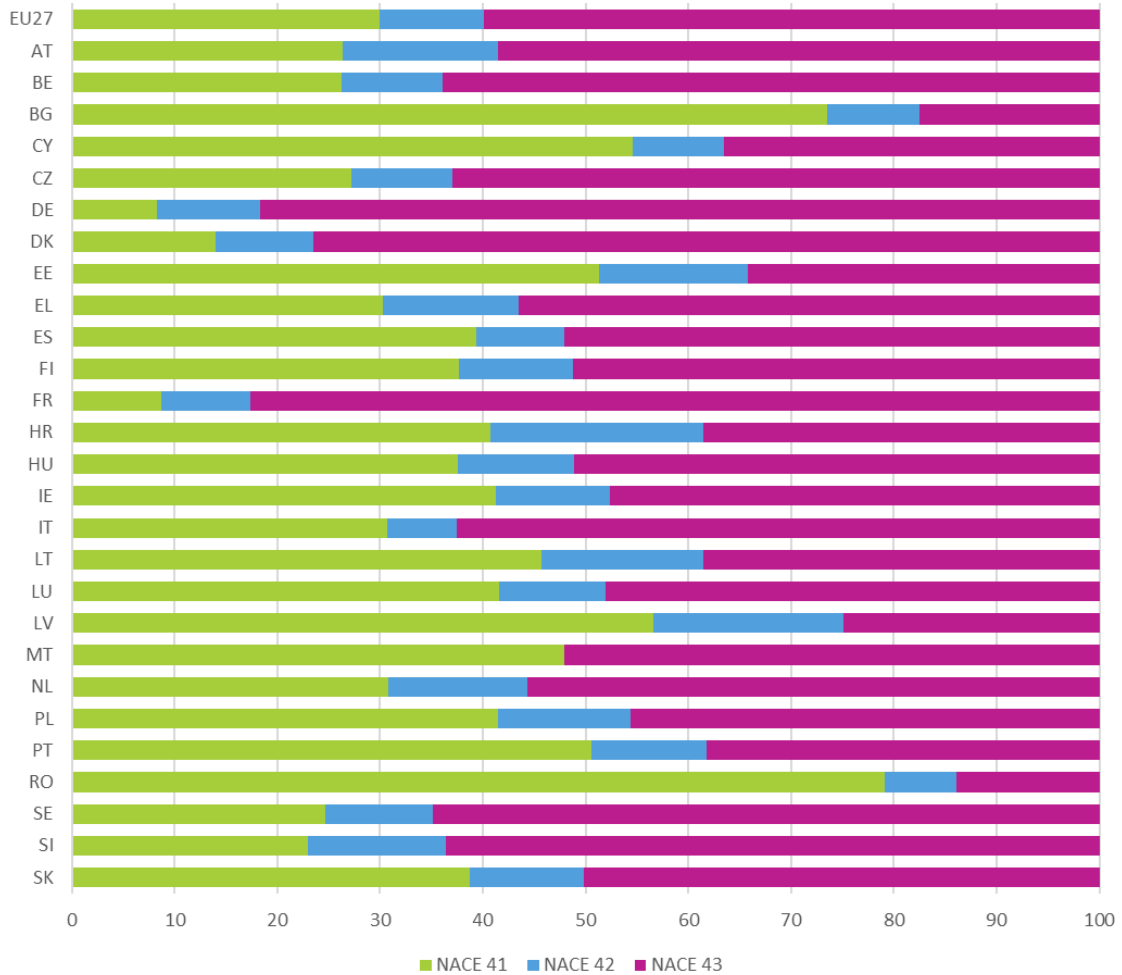
Member State	NACE 41	NACE 42	NACE 43
EU27	30.0	10.1	59.9
AT	26.3	15.2	58.5
BE	26.2	9.9	63.9
BG	73.5	9.0	17.5
CY	54.6	8.8	36.6
CZ	27.2	9.8	63.0
DE	8.3	10.1	81.6
DK	14.0	9.6	76.4
EE	51.3	14.4	34.2
EL	30.3	13.2	56.5
ES	39.3	8.6	52.1
FI	37.7	11.0	51.3
FR	8.7	8.7	82.6
HR	40.8	20.7	38.5
HU	37.6	11.4	51.1
IE	41.3	11.1	47.7
IT	30.7	6.8	62.5
LT	45.7	15.7	38.6
LU	41.6	10.4	48.1
LV	56.6	18.5	24.9
MT	48.0	n.a.	52.0
NL	30.8	13.5	55.7
PL	41.5	12.9	45.6
PT	50.6	11.3	38.2

Representativeness of the European social partner organisations: Construction sector

RO	79.1	7.0	13.9
SE	24.7	10.5	64.8
SI	22.9	13.5	63.6
SK	38.8	11.1	50.2

Source: EU-LFS data for 2020

Figure 4: Employment in NACE codes 41, 42 and 43 (% of the sectoral workforce), 2020



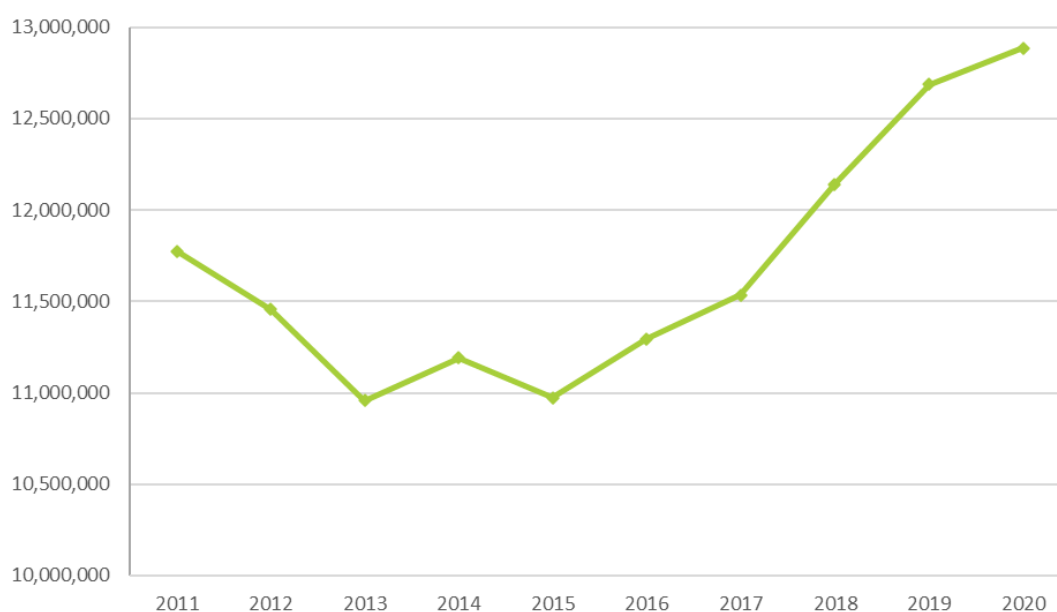
Source: EU-LFS data for 2020

In contrast to the majority of the EU countries, the construction of buildings sector (NACE 41) is the largest of the three subsectors in Bulgaria, Croatia, Cyprus, Estonia, Latvia, Lithuania, Portugal and Romania. In Denmark, France and Germany, the specialised construction activities sector (NACE 43) is disproportionately large, with more than 70% of the sectoral workforce (see Figure 4).

1.2. Changes in employment

The trend shows a decrease in employment in the overall construction sector in the EU until 2015 and a sharp increase thereafter, returning to the levels seen prior to the economic crisis (Figure 5). The data for 2020 show that, overall, the trend of an increase in the number of employees continued throughout the first pandemic year. A decrease between 2019 and 2020 could be observed in nine countries: Bulgaria, Estonia, Finland, Germany, Ireland, Latvia, Slovakia, Spain and Sweden.

Figure 5: Number of people employed in the construction sector in the EU, 2011–2020



Source: Eurostat, SBS data for 2020

Looking at individual countries, the largest (absolute) increase in the number of sectoral employees between 2011 and 2020 can be observed in Germany and the largest decrease in Italy (Figure 6 and Table 8). More insightful, however, is the relative change in sectoral employment. Increases are highest in Ireland (+66.3%), followed by Germany (+46.2%) and Hungary (+36.2%). The largest decreases in terms of relative change are observed in some of those countries hit hardest by the European debt crisis following the financial crisis of 2007–2008, namely Greece (-29.6%), Italy (-18.3%) and Portugal (-10.2%).

Figure 6: Absolute and relative change in construction sector employment, 2011–2020

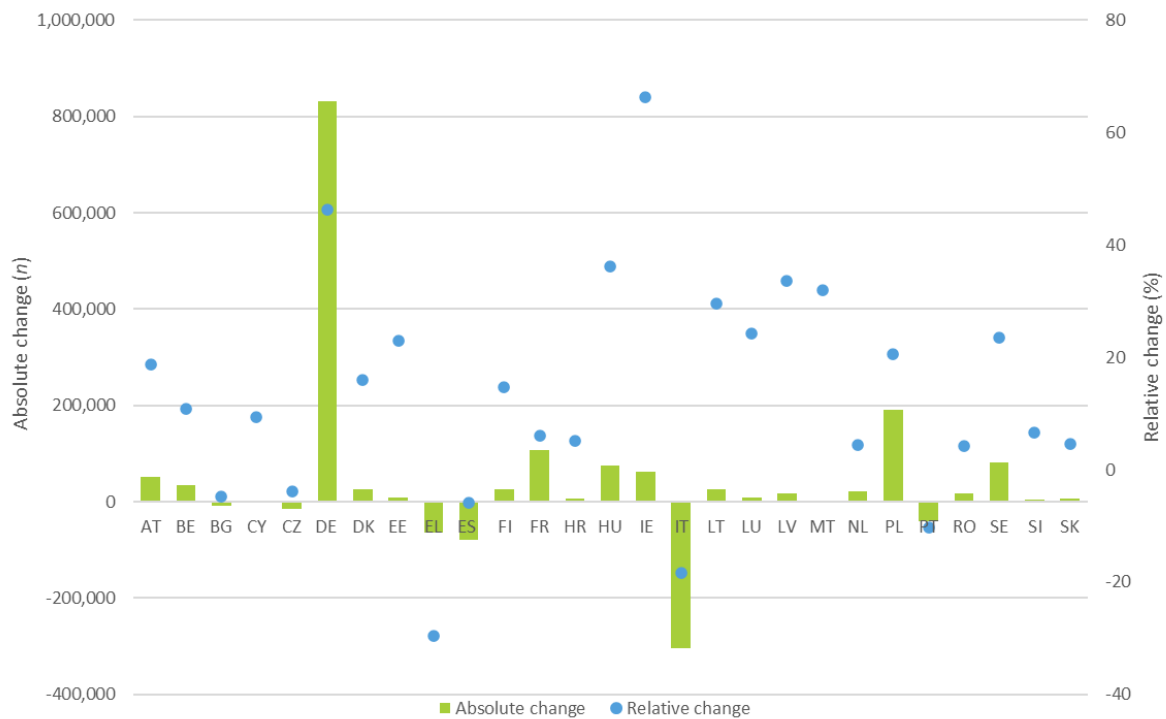


Table 8: Absolute and relative change in sectoral employment, 2011–2020

Member State	Absolute change (n)	Relative change (%)
AT	52,370	18.8
BE	34,139	10.9
BG	-7,588	-4.7
CY	3,142	9.4
CZ	-15,500	-3.9
DE	832,669	46.2
DK	26,446	16.0
EE	9,591	22.9
EL	-63,961	-29.6
ES	-78,322	-5.9
FI	26,599	14.7
FR	107,494	6.1
HR	6,114	5.1
HU	74,925	36.2
IE	62,709	66.3
IT	-303,205	-18.3
LT	26,476	29.6
LU	9,854	24.3
LV	17,644	33.6
MT	3,392	31.9
NL	21,759	4.5
PL	190,585	20.6
PT	-41,255	-10.2
RO	18,140	4.3

SE	82,610	23.5
SI	4,619	6.7
SK	7,683	4.6

Note: Green indicates Member States with the highest relative increases; red indicates those with the highest relative decreases.

Source: Eurostat, SBS data for 2020

1.3. Main characteristics of employment in the sector

The vast majority of workers in the construction sector are employees (Eurostat, SBS data for 2020), although there are quite large variations between countries. Only 43.2% of workers in Slovakia and 55.5% in Czechia are employees. On the other end of the spectrum, 98.8% of sectoral workers in Luxembourg and 97.4% in Romania are employees (see Table 9). The share of male workers is very high (EU27 average, 90.3%; Eurostat, SBS data for 2020) and ranges between 95.2% in Romania and 84.6% in Germany. A large share of employees work in small companies and SMEs. On average, 3.7 people are employed per enterprise (Eurostat, SBS data for 2019).

In several countries, a high share of permanent employment in the sector is reported by the NEC, whereas in others (Poland, Portugal, Spain) the share of temporary workers (on fixed-term contracts) is relatively high. Generally, temporary agency work is also quite common in the sector (for instance, in Greece 15% of the sectoral workforce are engaged by temporary work agencies). Part-time work levels are low, ranging from 5% in Spain to 11% in Austria and 17% in Latvia, whereas standard full-time work is prevalent in the sector according to the NEC.

Table 9: Share of employees out of total people employed (%)

Member State	Share of employees out of total people employed (%)
EU27	n.a.
AT	89.5
BE	61.6
BG	90.6
CY	95.6
CZ	55.5
DE	87.1
DK	91.5
EE	97.2
EL	57.5
ES	77.7
FI	87.5
FR	88.8
HR	90.8
HU	69.8
IE	73.7
IT	62.2
LT	85.6

LU	98.8
LV	90.6
MT	73.9
NL	66.1
PL	67.4
PT	85.3
RO	97.4
SE	78.3
SI	82.0
SK	43.2

Notes: *n.a.* = not available. **Number of people employed** is defined as the total number of people who work in the observation unit (inclusive of working proprietors, partners working regularly in the unit and unpaid family workers) and people who work outside the unit who belong to it and are paid by it (such as sales representatives, delivery personnel and repair and maintenance teams). It excludes personnel supplied to the unit by other enterprises, people carrying out repair and maintenance work in the enquiry unit on behalf of other enterprises and those in compulsory military service. **Number of employees** is defined as those people who work for an employer, have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind. A worker from an employment agency is considered an employee of that temporary employment agency and not of the unit (customer) in which they work.

Source: Eurostat, SBS data for 2020

Regarding the skills level of sectoral workers (as reported by the NEC), a high share of low- to medium-skilled employees is reported, with the majority of them being employed as blue-collar workers. Where the proportion of blue-collar workers has been provided, its share regularly approaches or exceeds two-thirds of the workforce (65% in Estonia, 70% in Luxembourg, 72% in Hungary). The share of employees working in higher-skilled occupations is relatively low, amounting to about 15% in the Netherlands, for instance. In Germany, the share of academics in the sector is less than 1%.

The sector has a high share of migrant and foreign workers⁸ (ranging from about 8% in Denmark to 20% in Germany, 27% in Czechia, 30% in Austria and Malta, 40% in Estonia and more than 50% in Cyprus) and a relatively high share of posted workers in countries where posting is a common practice. Poland sends the highest number of posted workers to other Member States, and over half of all posted workers are posted to Germany. After Germany, France receives the second highest number of posted workers. Poland, Spain and Portugal are the main countries of origin; however, due to the COVID-19 pandemic, there have been restrictions in numbers. Despite improvements, the sector is still characterised by working conditions that can be dangerous, making health and safety standards, and the monitoring of the accident rate, important. In 2019, the incident rate of non-fatal accidents (per 100,000 workers) in construction amounted to 3,211 in the EU27, compared with 1,603 for all sectors (EU-OSHA, 2023, p. 65).

Subcontracting chains are a common practice in the construction industry. In some cases, the chains of subcontracting become too long, which can increase risks of fraudulent practices, bogus self-

⁸ Migrant workers are people who are to be engaged, are engaged or have been engaged in a remunerated activity in a Member State of which they are not nationals; foreign workers are workers born in another Member State.

employment or undeclared work. Undeclared work in the construction sector is also reported in some Member States.⁹

The shortage of (skilled) workers is quite a large problem, especially in newer Member States – where outward migration is common – and is partly due to demographic reasons.

Employee representation can play an important role in the monitoring of the protection of workers' health and safety at company level. As can be seen in Table 10, in all Member States but (partially) Ireland the thresholds, if any, for the (obligatory) provision of employee representatives for health and safety purposes and for information and consultation purposes (or works councils) in the construction sector do not differ from the thresholds in other sectors of the economy. In most countries, the employee representatives (if there are any) are elected by the entire workforce of a company, and in about half of the countries (14 out of 27) trade union delegates or employee representatives are appointed by a trade union active in representing construction companies.

Table 10: Employee representation and role of trade unions in EU27 construction companies

Member State	Threshold for (compulsory) employee representative for health and safety purposes	Threshold for (compulsory) employee representative for information and consultation purposes (works council)	Is the threshold different from that of other sectors of the economy?	Are employee representatives elected by the entire workforce of companies?	Are there trade union delegates or employee representatives appointed by a trade union in construction companies?
AT	>10	>4	No	Yes	No
BE	>49	>99	No	Yes	No
BG	>5	n.a.	No	Yes	No
CY	>4	>29	No	Yes	Yes
CZ	n/a	n/a	No	Yes	No
DE	>4	>4	No	Yes	Yes
DK	>4	>4	No	No	No
EE	>9	n/a	No	n/a	Yes
EL	>20	>19	No	Yes	Yes
ES	>50	>50	No	Yes	Yes
FI	>9	n/a	No	Yes	No
FR	n/a	>10	No	Yes	Yes
HR	>19	>19	No	Yes	No
HU	>19	>15	No	Yes	No
IE	>20	>50	No (yes)*	Yes	Yes
IT	n/a	>15	No	Yes	Yes
LT	>50	>19	No	Yes	No
LU	>14	>14	No	Yes	Yes
LV	n/a	n/a	No	n.a.	No

⁹ Undeclared workers in the sector make up an estimated 20–30% of the workforce in Bulgaria, 29% in Latvia and 37% in Hungary.

MT	n/a	>49	No	Yes	Yes
NL	>25	>9	No	Yes	No
PL	n/a	>49	No	Yes	No
PT	n/a	n/a	No	Yes	Yes
RO	n/a	>19	No	Yes	No
SE	>4	>4	No	Yes	Yes
SI	n/a	n/a	No	No	Yes
SK	>50	>50	No	n.a.	Yes

* Not for information and consultation, but special regulations apply to safety representation in construction.

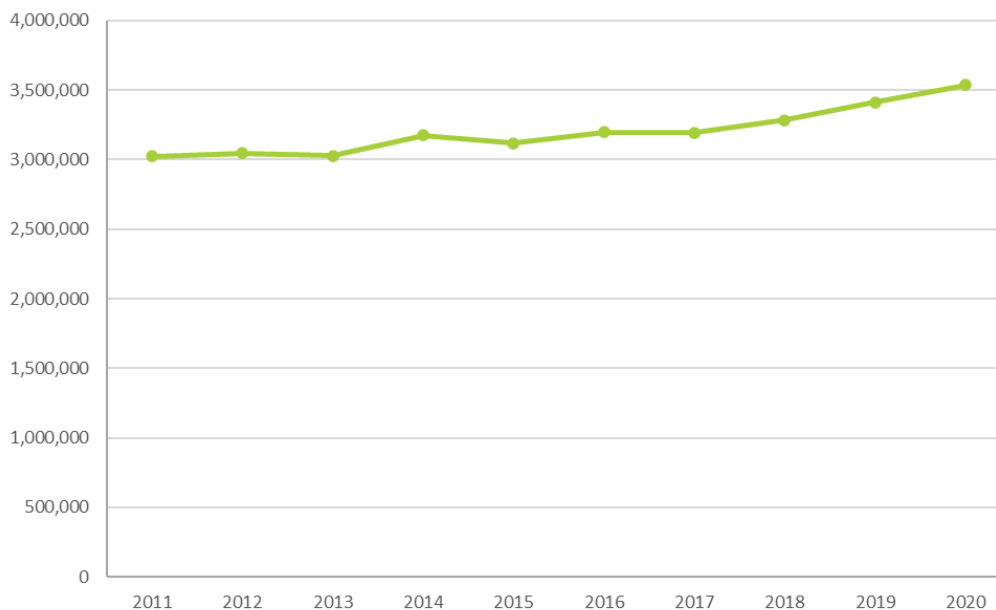
Notes: n.a. = not available; n/a = not applicable (no thresholds).

Source: NEC, 2021

1.4. Companies in the construction sector and economic development

The number of companies generally increased between 2011 and 2020, including in the first pandemic year (increase between 2019 and 2020) (Figure 7).

Figure 7: Number of companies in the construction sector in the EU, 2011–2020



Source: Eurostat, SBS data for 2020

In 2019, a total of 3,413,290 enterprises were active in the construction industry in the EU, and in 2020 the number of enterprises increased to 3,536,996 (Table 11). As of 2020, most of the companies were located in France (501,189 or 14.2% of all sectoral companies within the EU27), followed by Italy (13.9%), Germany (11.1%), Poland (11.0%) and Spain (10.7%).

Table 11: Number and share of companies in the construction sector and average number of workers per company, 2020

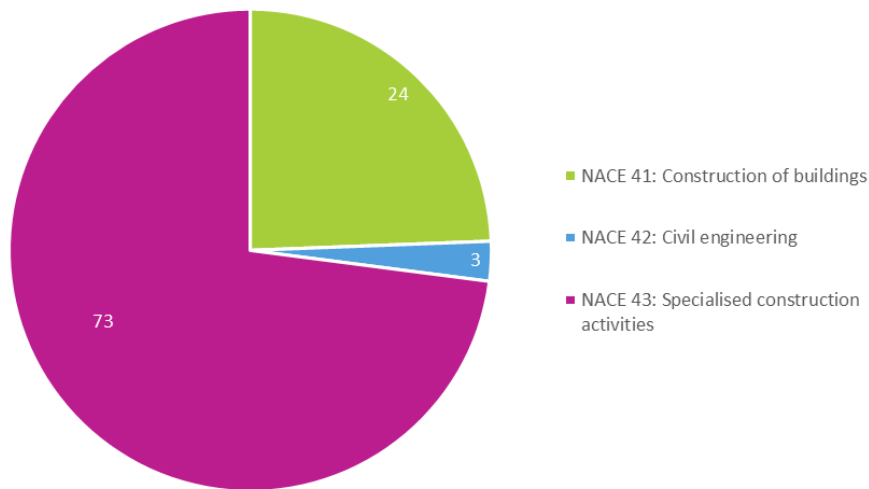
Member State	Number of companies in the construction sector	Share of EU construction sector companies (%)	Average number of workers per company
FR	501,189	14.2	3.7
IT	490,251	13.9	2.8
DE	393,852	11.1	6.7
PL	387,740	11.0	2.9
ES	379,025	10.7	3.3
NL	217,460	6.1	2.3
CZ	185,705	5.3	2.1
BE	127,121	3.6	2.7
SK	110,982	3.1	1.6
SE	102,966	2.9	4.2
HU	101,797	2.9	2.8
PT	92,328	2.6	3.9
RO	66,205	1.9	6.7
IE	62,664	1.8	2.5
EL	62,056	1.8	2.5
FI	42,375	1.2	4.9
AT	37,261	1.1	8.9
DK	34,755	1.0	5.5
LT	33,264	0.9	3.5
HR	24,044	0.7	5.3
BG	21,297	0.6	7.2
SI	20,164	0.6	3.6
EE	12,958	0.4	4.0
LV	11,558	0.3	6.1
CY	9,310	0.3	3.9
MT	4,360	0.1	3.2
LU	4,309	0.1	11.7
EU27	3,536,996	100.0	3.6

Notes: Member States ordered by number of companies (descending).

Source: Eurostat, SBS data for 2020

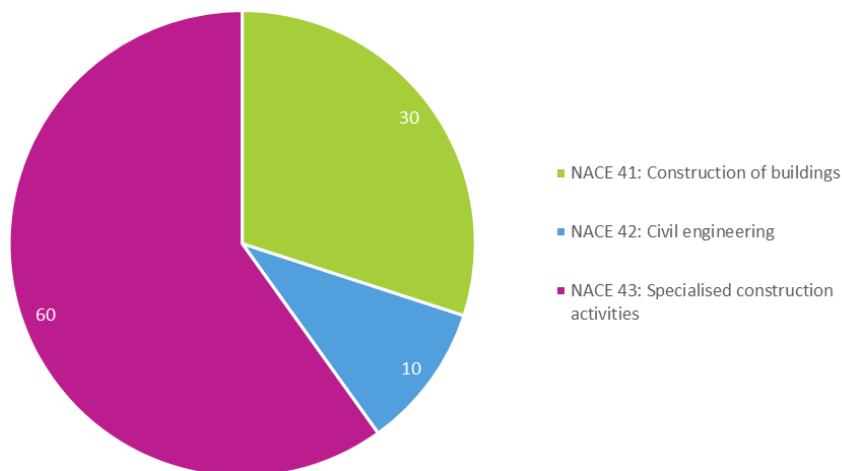
Most enterprises are found in the specialised construction activities sector: 73% of sectoral companies belong to this subsector, 24% belong to the construction of buildings sector and about 3% belong to the civil engineering sector (Figure 8). The shares of employment follow the same trend (Figure 9).

Figure 8: Share of companies in the three subsectors (%), 2020



Source: EU-LFS data for 2020

Figure 9: Share of employment in the three subsectors (%), 2020



Source: EU-LFS data for 2020

Table 12 shows that the company size in terms of workforce employed is largest by far among companies in civil engineering (NACE 42). Companies in the construction of buildings (NACE 41) are – in terms of average workforce size – slightly larger than those operating in specialised construction activities (NACE 43).

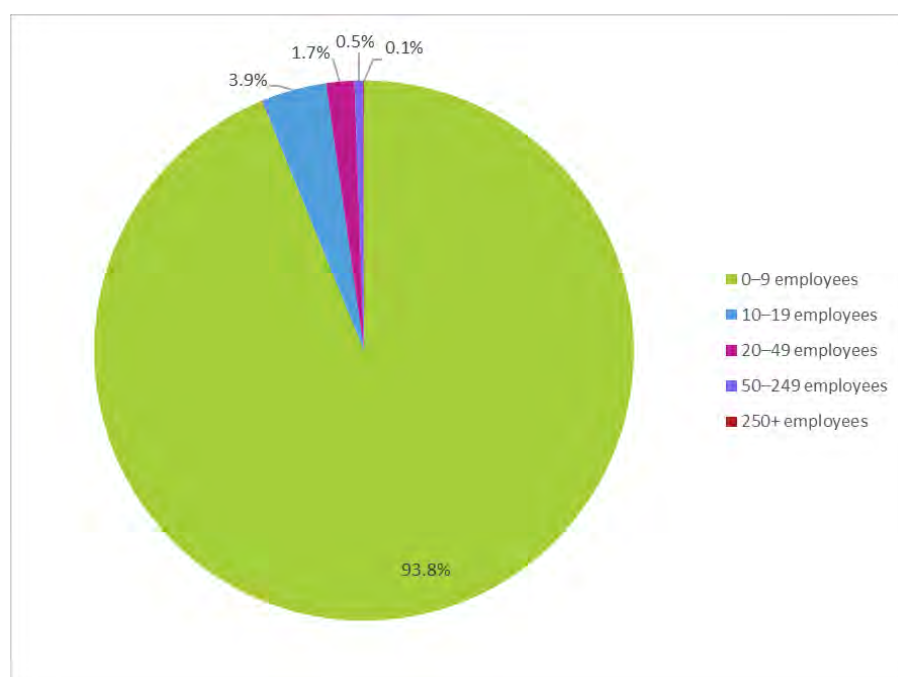
Table 12: Number and share of companies and workers in the three subsectors, and average workforce size per company, 2020

	NACE 41	NACE 42	NACE 43
Number of companies	862,950 24.4%	93,987 2.7%	2,580,058 72.9%
Number of workers	3,798,100 30.0%	1,275,100 10.1%	7,587,700 59.9%
Average workforce size per company	3.7	16	3.2

Sources: EU-LFS data for 2020 and Eurostat, SBS data for 2020

The construction sector is characterised by a large share of microenterprises (those with up to nine workers) – 94% at EU level (Figure 10).

Figure 10: Share of companies by company size (number of people employed) (%), 2019

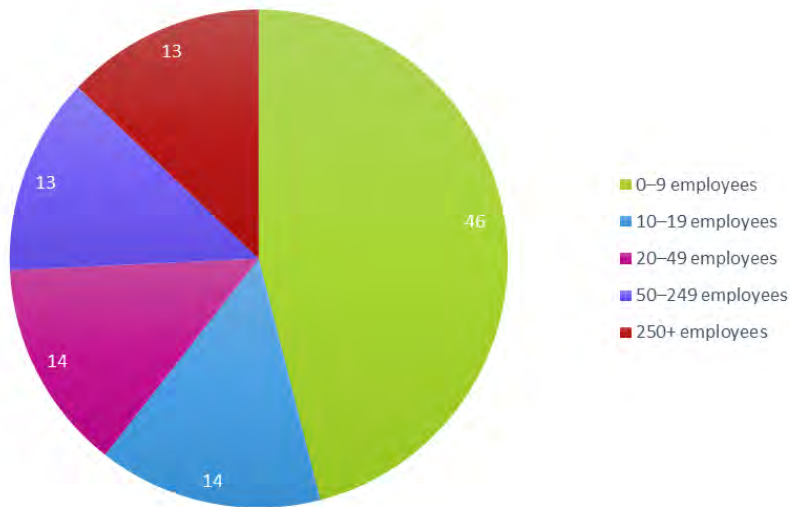


Source: Eurostat, SBS data for 2020

Almost half (46%) of all sectoral employees are employed in microenterprises, whereas the rest (54%) are distributed quite evenly among companies of larger size classes (Figure 11).

The microenterprise category includes self-employed people. It is important to point out that the available data do not allow for a distinction between self-employed people without employees and companies with 1–9 employees. Table 19 shows that 20 trade unions in 10 Member States organise self-employed people in the sector, while Table 24 indicates that they are covered by sectoral collective bargaining in only four Member States: Cyprus, Croatia, Ireland and Portugal.

Figure 11: Share of employment by company size (%), 2020



Source: Eurostat, SBS data for 2020

Table 13 indicates that larger companies with at least 50 employees are most represented among civil engineering companies and are least represented among companies in the specialised construction activities subsector.

Table 13: Companies in construction and each subsector, by size group (number and share of total), 2019–2020

Year	Size group	Construction as a whole	NACE 41	NACE 42	NACE 43
2019	All size groups	~3,413,290	~843,199	~89,968	~2,479,410
	0–9 workers	3,193,995 93.6%	786,846 93.3%	71,279 79.2%	2,335,870 94.2%
	10–19 workers	140,855 4.1%	34,259 4.1%	8,246 9.2%	98,350 4%
	20–49 workers	58,217 1.7%	16,003 1.9%	6,200 6.9%	36,000 1%
	50–249 workers	18,364 0.5%	5,613 0.7%	3,560 4%	9,190 0.4%
	250+ workers	n.a.	n.a.	n.a.	n.a.
2020	All size groups	3,536,996	862,841	93,977	2,583,501
	0–9 workers	3,318,528 93.82%	806,797 93.49%	75,094 79.97%	2,436,637 94.44%
	10–19 workers	138,894 3.93%	34,000 3.94%	8,200 8.73%	100,000 3.88%
	20–49 workers	59,485 1.68%	16,133 1.87%	6,453 6.87%	36,917 1.43%
	50–249 workers	18,203 0.51%	5,409 0.63%	3,587 3.82%	9,206 0.36%
	250+ workers	1,886 0.05%	502 0.06%	643 0.68%	741 0.03%

Note: *n.a.* = not available. The table includes some estimates, so the values in the subcategories do not necessarily match the total values (aggregate numbers).

Sources: Eurostat, SBS data for 2019 and 2020

Slovakia (99%), the Netherlands (98%), Belgium, Czechia, Ireland and Greece (97% each), and Hungary, Italy, Malta and Poland (96% each) have the largest shares of microenterprises among sectoral companies (Table 14).

Table 14: Total construction sector companies, share by size group and average employees per company, 2020

Member State	Total number of companies	Share of companies employing 0–9 people (%)	Share of companies employing 10–19 people (%)	Share of companies employing 20–49 people (%)	Share of companies employing 50–249 people (%)	Share of companies employing 250+ people (%)	Average number of people employed per company
EU27	3,536,996	93.8	3.9	1.7	0.5	0.1	3.6
AT	37,261	83.0	9.7	5.5	1.8	0.2	8.9
BE	127,121	97.0	1.9	1.0	0.3	0.1	2.7
BG	21,297	84.6	7.9	4.9	2.4	0.2	7.2
CY	9,310	92.8	4.5	2.0	0.7	0.1	3.9
CZ	185,705	97.4	1.4	0.8	0.3	0.0	2.1
DE	393,852	84.6	10.7	3.6	1.1	0.1	6.7
DK	34,755	89.1	6.1	3.4	1.3	0.1	5.5
EE	12,958	92.0	5.5	2.0	0.5	0.1	4
EL	62,056	96.8	2.0	0.9	0.3	0.0	2.5
ES	379,025	94.8	3.3	1.4	0.4	0.1	3.3
FI	42,375	90.7	5.6	2.8	0.8	0.1	4.9
FR	501,189	94.5	3.5	1.5	0.4	0.0	3.7
HR	24,044	89.9	6.0	2.9	1.1	0.1	5.3
HU	101,797	95.6	2.8	1.2	0.3	0.0	2.8
IE	62,664	96.6	2.0	1.0	0.3	0.0	2.5
IT	490,251	95.7	3.0	1.0	0.3	0.0	2.8
LT	33,264	93.4	3.4	2.2	0.8	0.1	3.5
LU	4,309	74.5	12.1	8.9	3.9	0.6	11.7
LV	11,558	86.4	7.4	4.5	1.5	0.1	6.1
MT	4,360	95.5	2.3	1.4	0.7	0.1	3.2
NL	217,460	97.5	1.3	0.8	0.4	0.1	2.3
PL	387,740	96.2	2.3	1.1	0.3	0.0	2.9
PT	92,328	92.9	4.2	2.1	0.7	0.1	3.9
RO	66,205	86.4	7.8	4.1	1.5	0.1	6.7
SE	102,966	92.9	4.0	2.2	0.7	0.1	4.2
SI	20,164	92.9	4.5	2.0	0.6	0.0	3.6
SK	110,982	99.0	0.5	0.4	0.1	0.0	1.6

Source: Eurostat, SBS data for 2020

Table 15 shows that the three largest companies employ less than 5% of the national sectoral workforce in most Member States. In Sweden, the three largest companies employ 8% of the national sectoral workforce, in Austria 9%, in France 11% and in Spain 24%. Together with Germany,

Italy and the Netherlands, these are the seven Member States where there are construction companies with more than 10,000 employees.

Table 16 corroborates the above findings that the larger firms in the construction sector tend to engage in activities related to the construction of buildings (NACE 41) and civil engineering (NACE 42) subsectors, but to a lesser extent in activities related to specialised construction activities (NACE 43). Moreover, the three largest companies per country together account for 5% or more of a country's total number of sectoral employees in six Member States: Austria, France, Germany, the Netherlands, Spain and Sweden. In most countries, all of the three largest companies have a trade union presence, in that at least one trade union organises employees in the company (Table 16). Of those countries for which full information is available, in Greece, Hungary, Lithuania, Poland and Slovakia at least one of the three largest companies does not record any trade union presence. On the other hand, in Estonia, Germany, Latvia and Slovakia (for which information on the three largest companies has been provided) at least one of the three largest construction companies is not affiliated to an employer organisation. In Greece, Lithuania, Poland and Slovakia, at least one of the three largest companies is not covered by either a multi-employer or a single-employer agreement, whereas in all other countries (of those for which information has been provided) the largest enterprises are covered by a multi-employer agreement and/or engage in single-employer bargaining.

Table 15: Relative importance of large companies in the sector

Average number of workers per company	Proportion of the national workforce employed by the three largest companies				
	<2%	2–4%	5–8%	>9%	Not available
2–3	HU, PL	BE, CZ, IE, IT, SK		ES, NL	EL, MT
4–5	CY, HR, LT, SI	EE, FI, PT	SE	FR	
6–7	BG, RO	DK, LV	DE		
8+		LU		AT	

Note: The seven countries in bold are those with companies with more than 10,000 employees.

Source: Based on Tables 11 and 16

Table 16: Subsectoral coverage, number of employees, trade union presence, affiliation to employer organisations and collective bargaining application of the three largest (in terms of number of employees) construction companies per country

Member State	Company name	Coverage: (part of) NACE 41	Coverage: (part of) NACE 42	Coverage: (part of) NACE 43	Number of sector-related employees in the company	Trade union organising employees in the company	Employer organisation to which company is affiliated	Kind of collective bargaining applicable to company
AT	Strabag	Yes	Yes	No	11,500	GBH, GPA	BIB, FVBI	MEB
AT	PORR AG	Yes	Yes	No	10,000	GBH, GPA	BIB, FVBI	MEB
AT	Swietelsky AG	Yes	Yes	Yes	5,000–6,000	GBH, GPA	BIB, FVBI	MEB
AT	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 9%			
BE	Jan de Nul	No	Yes	No	1,369	ACV-CSC BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Embuild	MEB + SEB
BE	Dredging International	No	Yes	No	1,188	ACV-CSC BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Embuild	MEB + SEB
BE	Thomas & Piron Home	Yes	No	No	1,020	ACV-CSC BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Embuild	MEB + SEB
BE	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: 2%			
BG	PMU	Yes	Yes	No	250	Company trade union	CEIBG	SEB
BG	Strabag	Yes	Yes	No	100	FITUC	BCC	SEB
BG	n.a.							
BG	Two largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: 0%			
CY	Iacovou Group	Yes	Yes	Yes	100	Oikodomoï-PEO, OOIM-SEK	OSEOK	MEB
CY	Cyfield Group	Yes	Yes	Yes	100	Oikodomoï-PEO, OOIM-SEK	OSEOK	MEB
CY	Atlas Pantou Co Ltd	Yes	Yes	Yes	100	Oikodomoï-PEO, OOIM-SEK	OSEOK	MEB
CY	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 1%			
CZ	Metrostav a.s.	No	No	Yes	3,112	OS Stavba	SPS	MEB + SEB
CZ	Strabag a.s.	Yes	No	No	2,309	OS Stavba	SPS	MEB + SEB

Representativeness of the European social partner organisations: Construction sector

Member State	Company name	Coverage: (part of) NACE 41	Coverage: (part of) NACE 42	Coverage: (part of) NACE 43	Number of sector-related employees in the company	Trade union organising employees in the company	Employer organisation to which company is affiliated	Kind of collective bargaining applicable to company
CZ	Skanska a.s.	No	Yes	Yes	2,025	OS Stavba	SPS	MEB + SEB
CZ	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 3%			
DE	Hochtief	Yes	Yes	No	>53,000	IG BAU	None	SEB
DE	Kaefer Isolier-technik	No	No	Yes	28,000	IG BAU	Bauindustrie*	MEB
DE	Strabag	Yes	Yes	No	23,000	IG BAU	Bauindustrie*	MEB
DE	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 5%			
DK	Per Aersleff	Yes	No	No	2,500	3F	DI Byggeri	MEB + SEB
DK	Kemp & Lauritzen	No	No	Yes	2,350	Dansk Metal, 3F, Blik&Rør, DEF	Tekniq	SEB
DK	Bravida Danmark	No	No	Yes	1,800	DEF, Blik&Rør, Dansk Metal	Tekniq	SEB
DK	Three largest companies	Aggregate coverage: NACE 41, NACE 43			Aggregate share of sectoral employees: 4%			
EE	Enefit Connect	No	Yes	No	714	EEAÜL	None	SEB
EE	TREV-2 Grupp	No	Yes	No	<385	n.a.	EEEL	n.a.
EE	Merko Ehitus Eesti	Yes	Yes	Yes	304	n.a.	EEEL	n.a.
EE	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 3%			
EL	AVAX SA	Yes	Yes	No	<3,000	None	Pedmede, SATE	None
EL	Ellaktor SA	Yes	Yes	Yes	<3,000	None	Pedmede, SATE	None
EL	n.a.							
EL	Two largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: n.a.			
ES	ACS	Yes	Yes	Yes	181,699	CCOO del Hábitat, UGT FICA	Seopan (CNC member)	MEB
ES	FCC	Yes	Yes	Yes	59,314	CCOO del Hábitat, UGT FICA	Seopan (CNC member)	MEB
ES	Acciona	Yes	Yes	Yes	10,488	CCOO del Hábitat, UGT FICA	Seopan (CNC member)	MEB
ES	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 24%			

Representativeness of the European social partner organisations: Construction sector

Member State	Company name	Coverage: (part of) NACE 41	Coverage: (part of) NACE 42	Coverage: (part of) NACE 43	Number of sector-related employees in the company	Trade union organising employees in the company	Employer organisation to which company is affiliated	Kind of collective bargaining applicable to company
FI	YIT	Yes	No	No	4,000	RL, Pro	LVI TU	MEB
FI	Skanska	Yes	No	No	2,000	RL, Pro	LVI TU	MEB
FI	n.a.							
FI	Two largest companies	Aggregate coverage: NACE 41			Aggregate share of sectoral employees: 3%			
FR	Bouygues	n.a.	n.a.	n.a.	66,177	BATI-MAT-TP CFTC, FO Construction	FFB, FNTP	MEB + SEB
FR	Vinci	n.a.	n.a.	n.a.	55,051	FNCB-CFDT, CFE-CGC BTP, FO Construction, FNCSBA CGT	FFB, FNTP	MEB + SEB
FR	Eiffage	n.a.	n.a.	n.a.	54,850	CFE-CGC BTP, FO Construction, FNCSBA CGT, FNCB- CFDT	FFB, FNTP	MEB + SEB
FR	Three largest companies	Aggregate coverage: n.a.			Aggregate share of sectoral employees: 11%			
HR	Strabag	Yes	No	No	850	SGH	HUP-UPG	SEB
HR	Kamgrad	Yes	No	No	760	SGH	HUP-UPG	SEB
HR	Dalekovod	No	Yes	No	730	SGH	HUP-UPG	MEB + SEB
HR	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: <2%			
HU	Duna Aszfalt	No	Yes	No	1,500	None	ÉVOSZ	MEB
HU	Strabag	No	Yes	No	989	Strabag union	ÉVOSZ	MEB + SEB
HU	Merket Építő	Yes	No	No	478	None	ÉVOSZ	MEB
HU	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: <2%			
IE	BAM	n.a.	n.a.	n.a.	>3,000	SIPTU, Unite, Connect	CIF	MEB + SEB
IE	Sisk Group	n.a.	n.a.	n.a.	1,700	SIPTU, Unite, Connect	CIF	MEB + SEB
IE	Mercury Engineering	n.a.	n.a.	n.a.	n.a.	Connect, Unite	CIF	MEB + SEB
IE	Three largest companies	Aggregate coverage: n.a.			Aggregate share of sectoral employees: 4%			

Representativeness of the European social partner organisations: Construction sector

Member State	Company name	Coverage: (part of) NACE 41	Coverage: (part of) NACE 42	Coverage: (part of) NACE 43	Number of sector-related employees in the company	Trade union organising employees in the company	Employer organisation to which company is affiliated	Kind of collective bargaining applicable to company
IT	Webuild SpA ¹⁰	Yes	Yes	No	17,712	Fenealuil, FILCA CISL, Fillea CGIL	ANCE	MEB + SEB
IT	Saipem SpA	No	Yes	Yes	6,265	Fenealuil, FILCA CISL, Fillea CGIL	ANCE	MEB + SEB
IT	Impresa Pizzarotti & C. SpA	Yes	Yes	Yes	1,976	Fenealuil, FILCA CISL, Fillea CGIL	ANCE	MEB + SEB
IT	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 3%			
LT	Kauno Tiltai	No	Yes	No	800	None	LSA	None
LT	YIT Lietuva	Yes	No	No	700	LPPSF	LSA	SEB
LT	Autokausta	Yes	No	No	550	None	LSA	None
LT	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: <2%			
LU	Groupe Elco	No	No	Yes	520	SBABCM-OGBL, LCGB-CA	GEBTP, FDA	SEB
LU	CDCL SA	Yes	No	No	490	SBABCM-OGBL, LCGB-CA	GEBTP, FDA	SEB
LU	C. Karp-Kneip Constructions	No	Yes	No	450	SBABCM-OGBL, LCGB-CA	GEBTP, FDA	SEB
LU	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 3%			
LV	Latvijas autoceļu uzturētājs	No	Yes	No	1,277	LCDA	LBP	MEB + SEB
LV	UPB	n.a.	n.a.	n.a.	593	LBNA	None	MEB
LV	Latvijas energo-celtnieks	n.a.	n.a.	n.a.	510	n.a.	n.a.	n.a.
LV	Three largest companies	Aggregate coverage: n.a. (but at least NACE 42)			Aggregate share of sectoral employees: 4%			
MT	n.a.							
MT	n.a.							
MT	n.a.							

¹⁰ Astaldi SpA was acquired by Webuild in 2020. Before that, Astaldi was the third largest company in the sector, with about 5,810 employees.

Representativeness of the European social partner organisations: Construction sector

Member State	Company name	Coverage: (part of) NACE 41	Coverage: (part of) NACE 42	Coverage: (part of) NACE 43	Number of sector-related employees in the company	Trade union organising employees in the company	Employer organisation to which company is affiliated	Kind of collective bargaining applicable to company
MT	n.a.	Aggregate coverage: n.a.			Aggregate share of sectoral employees: n.a.			
NL	BAM	Yes	Yes	Yes	19,500	FNV, CNV Vakmensen	Bouwend NL	MEB
NL	VolkerWessels	Yes	Yes	No	16,000	FNV, CNV Vakmensen	Bouwend NL	MEB
NL	Boskalis	No	Yes	No	10,000	FNV, CNV Vakmensen	Bouwend NL	MEB
NL	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 14%			
PL	Budimex	No	Yes	No	6,438	ZZ Budowlani, SBiPD NSZZ Solidarność	PZPB	SEB
PL	Strabag	No	Yes	No	4,500	None	PZPB	None
PL	Skanska	Yes	No	No	n.a.	ZZ Budowlani, SBiPD NSZZ Solidarność, company trade union	PZPB	SEB
PL	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: >1%			
PT	Mota-Engil	No	Yes	No	4,000	n.a.	Aecops	MEB
PT	Teixeria Duarte	No	Yes	No	3,000	Fevicom	Aecops, AICCOPN	MEB
PT	Soares da Costa	Yes	No	No	2,000	Fevicom	n.a.	MEB
PT	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: 3%			
RO	Hidro-conștructia SA	No	Yes	No	1,607	Company trade union affiliated to FGS Familia	ARACO	SEB
RO	Technostrade SRL	No	Yes	No	1,170	Company trade union	FPSC	SEB
RO	Astaldi SpA Italia Sucursarla Romania Bucuresti	Yes	No	No	1,058	Company trade union	FPSC	SEB
RO	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: 1%			
SE	Peab	Yes	Yes	Yes	11,897	Byggnads, Målarna, Unionen, Ledarna, SEKO,	Byggföretagen	MEB

Representativeness of the European social partner organisations: Construction sector

Member State	Company name	Coverage: (part of) NACE 41	Coverage: (part of) NACE 42	Coverage: (part of) NACE 43	Number of sector-related employees in the company	Trade union organising employees in the company	Employer organisation to which company is affiliated	Kind of collective bargaining applicable to company
						Sveriges Ingenjörer		
SE	Skanska	Yes	Yes	Yes	9,167	Byggnads, Målarna, Unionen, Ledarna, SEKO, Sveriges Ingenjörer	Byggföretagen	MEB
SE	NCC	Yes	Yes	Yes	9,163	Byggnads, Målarna, Unionen, Ledarna, SEKO, Sveriges Ingenjörer	Byggföretagen	MEB
SE	Three largest companies	Aggregate coverage: NACE 41, NACE 42, NACE 43			Aggregate share of sectoral employees: 8%			
SI	CGP	Yes	No	No	535	Company trade union	ZDS	MEB + SEB
SI	Pomgrad	Yes	No	No	420	Company trade union	ZDS	MEB + SEB
SI	Kolektor	No	Yes	No	403	KNSS, Company trade union	ZDS	MEB + SEB
SI	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: <2%			
SK	Doprastav	No	Yes	No	1,246	IOZ	ZSPS	MEB + SEB
SK	Skanska SK	No	Yes	No	785	None	None	None
SK	Strabag	Yes	No	No	690	IOZ	ZSPS	MEB + SEB
SK	Three largest companies	Aggregate coverage: NACE 41, NACE 42			Aggregate share of sectoral employees: 3%			

* Affiliation through a regional affiliate.

Notes: n.a. = not available; MEB = multi-employer bargaining; SEB = single-employer bargaining.

Sources: NEC, 2021, own calculations on the basis of data provided by the NEC, and Eurostat, SBS data

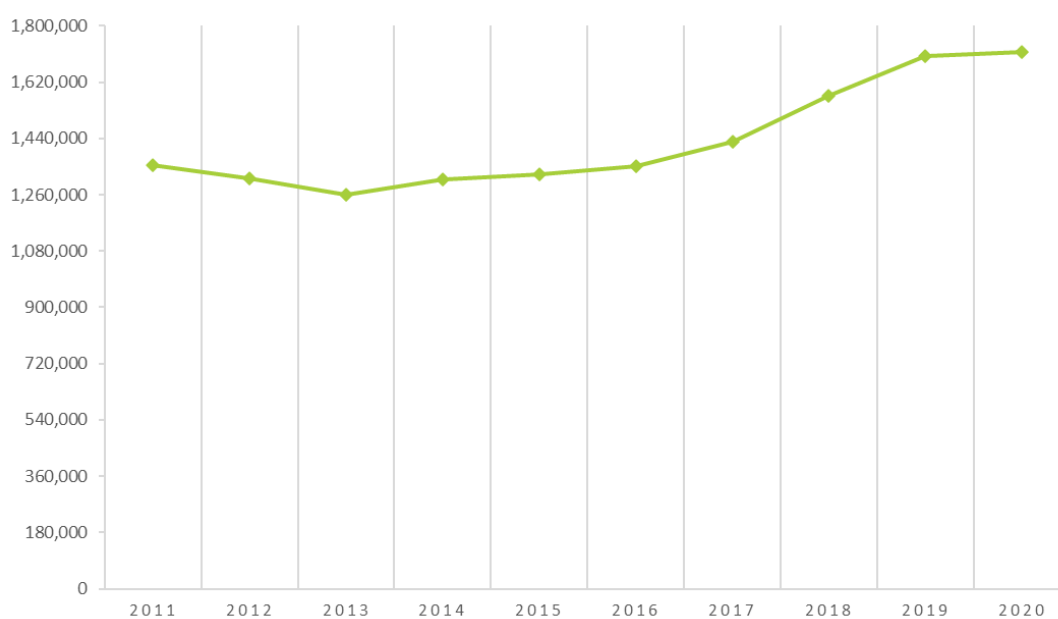
Table 16 lists the largest companies (those with the most employees) for each of the 27 Member States. Table 13 shows that only 0.05% of all construction sector companies have more than 250 employees, while Figure 11 indicates that these companies provide employment to 13% of the sectoral workforce. At the other end are the microenterprises (0–9 employees) in the construction sector, which make up 94% of all companies and employ 46% of the sector's entire workforce. According to the Eurofound NEC country reports, in at least 22 of the 27 Member States microenterprises are covered by collective bargaining: in Lithuania, Poland and Slovakia they are not, while the situation in Estonia and Romania is unclear.

1.5. Pandemic effects

The COVID-19 pandemic had a strong effect on the economic and employment situation in the sector, as reported in the national contributions by the NEC: on most construction sites, the work continued during the pandemic and in the periods of partial and full lockdowns; however, challenges regarding the supply of materials, price increases and difficulties in the delivery of specific materials impeded the normal run of business. An increase in the costs of materials was evident, caused by a lack of supply and speculative behaviours. Delivery times lengthened and, because of all these problems, delays in construction projects were common. When borders were closed, a lack of commuters and posted workers further aggravated the employment situation.

While turnover in the sector had increased annually since 2014 (Figure 12), no significant decrease can be observed between 2019 and 2020 (Eurostat, SBS data for 2019). In 2020, the total turnover of the EU construction sector was around €1.72 trillion, similar to the €1.70 trillion in 2019. The turnover in 2020 was highest in Germany (€373.9 billion), followed by France (€314.9 billion) and Italy (€159.7 billion) and lowest in Malta (€1.6 billion), Cyprus (€4.2 billion), Latvia (€4.5 billion) and Estonia (€6.0 billion).

Figure 12: Turnover or gross premiums written (million euro), 2011–2020



Source: Eurostat, SBS data for 2020

The turnover from the construction sector corresponds to around 6.9% of the total turnover of the EU economy (2020: €24.845 trillion). At the national level, turnover (as a share of total turnover of the overall national economy) is highest in Cyprus (12%), followed by Finland (10.2%). At the lower end are Ireland (3.8%) and Greece (4.2%).

2. National level of interest representation

The NEC identified 77 sector-related trade unions in 27 countries, and 93 employer organisations and business associations in 27 countries (Table 17).

Table 17: Number of sector-related organisations per country, 2021

Number of sector-related organisations	Member States with this number of trade unions in the construction sector overall	Member States with this number of employer organisations/ business associations in the construction sector overall
0		
1	CZ, DE, HU, MT, RO, SK	BG, CY, CZ, EE, ES, LT, MT
2	BG, EE, HR, LT, LU, LV, PL, SI	DK, HR, HU, IE, LU, SK
3	AT, BE, EL, ES, IT, NL	BE, EL, LV, PL, ¹¹ SI
4	CY	NL, PT, RO
5	DK, FI, IE, PT	FR
6	FR	SE
7	SE	DE
8		FI
9		IT
10		
11		
12		AT

Source: NEC

All Member States record at least one sector-related trade union and at least one sector-related employer organisation or business association. This means that there is at least one union and at least one employer organisation or business association engaging in sector-related collective bargaining (or participating in sector-related social dialogue or policy consultation) and/or affiliated to one of the relevant European-level social partner organisations.

On the side of organised labour, a slight majority of countries (14) have only one or two sector-related trade unions, while 13 countries have a more pluralist representational landscape. This latter group comprises countries where representation cleavages depend on ideological traditions (Belgium, Cyprus, France, Italy, the Netherlands, Portugal, Spain), while in the other countries (Austria, Denmark, Finland, Greece, Ireland, Sweden) representation is more based on occupational divides or representational segmentation in terms of business activities in the sector.

On the side of employer organisations or business associations, the situation is similar. In 13 EU countries, there are only one or two organisations. In another group of countries, which consists of Belgium, France, Greece, Latvia, the Netherlands, Poland, Portugal, Romania and Slovenia, three, four or five employer organisations or business associations can be found. A third group of countries, comprising Austria, Finland, Germany, Italy and Sweden, records six or more organisations on the employer side. Pronounced employer segmentation reflects the heterogeneity of the sector in terms of business activities, in that different employer organisations or business associations organise

¹¹ There are other national sectoral associations in Poland that we have not included in the counting for this report. They are listed in Table 27 in footnote 19.

either different types or size classes of companies or, more frequently, different parts of the sector in terms of business activities.

2.1. Construction sector coverage, membership domain and organisational density of trade unions

2.1.1. Sector coverage and membership domain

Trade unions in the construction sector cover three subsectors – that is, construction of buildings according to NACE 41, civil engineering according to NACE 42 and specialised construction activities according to NACE 43. Table 18 lists all sector-related trade unions and indicates their sector coverage. Of the 77 organisations for which relevant information was available, 54 from 25 countries (the EU27 except Estonia and Malta) cover at least part of all three subsectors, while 21 represent members in one or two subsectors. For two trade unions (YTN of Finland and SPS of Lithuania), no information was available.

In order to know how many and which trade unions cover the whole construction sector, in the sense of all subactivities in all three subsectors, it is necessary to look at the membership domain (Table 18). All trade unions with a membership domain congruent or overlapping relative to the construction sector cover the whole sector; this applies to 22 organisations from 12 countries. What can also be seen is that a vast majority of trade unions (70 of 77) have a domain (sectionally) overlapping relative to construction, which means that these trade unions organise (part of) the construction sector and (part of) sectors other than construction.

Table 18: Sector coverage of the construction sector trade unions, 2021

Member State (MS)	Trade union (TU)	At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	Membership domain relative to construction	Organising sectors other than construction
EU27	77 TUs	57 TUs	63 TUs	68 TUs		70 TUs
	27 MSs	25 MSs	26 MSs	26 MSs		26 MSs
EFBWW	50 TUs	43 TUs 75%	42 TUs 67%	49 TUs 72%		46 TUs 66%
	24 MSs Not in EE, EL, LT	23 MSs Not in MT	23 MSs Not in MT	24 MSs		23 MSs Not in SI
AT	GBH	Yes	Yes	Yes	SO	Yes
AT	GPA	Yes	Yes	Yes	SO	Yes
AT	PRO-GE	No	No	Yes	SO	Yes
BE	ABVV-FGTB ACCG	Yes	Yes	Yes	O	Yes
BE	ACLVB-CGSLB	Yes	Yes	Yes	O	Yes
BE	ACV-CSC BIE	Yes	Yes	Yes	SO	Yes
BE	ACV-Puls ¹²					

¹² ACV Puls transferred its members to ACV-CSC BIE in 2019, and no longer has members in the construction sector.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Trade union (TU)	At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	Membership domain relative to construction	Organising sectors other than construction
BG	FITUC	Yes	No	No	S	No
BG	FCIW	Yes	Yes	Yes	SO	Yes
CY	Oikodomoi-PEO	Yes	Yes	Yes	SO	Yes
CY	Semmik-PEO	No	Yes	Yes	SO	Yes
CY	OOIM-SEK	Yes	Yes	Yes	SO	Yes
CY	OBIEK-SEK	No	Yes	Yes	SO	Yes
CZ	OS Stavba	Yes	Yes	Yes	SO	Yes
DE	IG BAU	Yes	Yes	Yes	O	Yes
DK	3F	Yes	Yes	Yes	SO	Yes
DK	Dansk Metal	No	No	Yes	SO	Yes
DK	DEF	No	Yes	Yes	SO	Yes
DK	Blik&Rør	No	No	Yes	SO	Yes
DK	MFD	Yes	Yes	Yes	SO	Yes
EE	ETTA	No	Yes	No	SO	Yes
EE	EAAÜL	No	Yes	No	SO	Yes
EL	OOSEE	Yes	Yes	Yes	SO	Yes
EL	OHMEE	Yes	Yes	Yes	SO	Yes
EL	OHE	No	No	Yes	SO	Yes
ES	CCOO del Hábitat	Yes	Yes	Yes	O	Yes
ES	ELA – Industria eta Eraikuntza	Yes	Yes	Yes	SO	Yes
ES	UGT FICA	Yes	Yes	Yes	O	Yes
FI	RL	Yes	No	Yes	SO	Yes
FI	Pro	Yes	Yes	Yes	SO	Yes
FI	YTN	n.a.	n.a.	n.a.	SO	Yes
FI	JHL	No	Yes	No	SO	Yes
FI	FEWU	No	No	Yes	SO	Yes
FR	FNCB-CFDT	Yes	Yes	Yes	O	Yes
FR	FO Construction	Yes	Yes	Yes	O	Yes
FR	BATI-MAT-TP CFTC	Yes	Yes	Yes	O	Yes
FR	FNSCBA CGT	Yes	Yes	Yes	O	Yes
FR	CFE-CGC BTP	Yes	Yes	Yes	SO	Yes
FR	UNSA I&C	Yes	Yes	Yes	O	Yes
HR	SGH	Yes	Yes	Yes	O	Yes
HR	NCS	No	No	Yes	S	No
HU	ÉFÉDOSZSZ	Yes	Yes	Yes	O	Yes

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Trade union (TU)	At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	Membership domain relative to construction	Organising sectors other than construction
IE	SIPTU	Yes	Yes	Yes	SO	Yes
IE	Unite	Yes	Yes	Yes	SO	Yes
IE	BATU	Yes	Yes	Yes	SO	Yes
IE	Connect	Yes	Yes	Yes	SO	Yes
IE	Opatsi	Yes	Yes	Yes	S	No
IT	Fillea CGIL	Yes	Yes	Yes	SO	Yes
IT	FILCA CISL	Yes	Yes	Yes	SO	Yes
IT	Fenealuil	Yes	Yes	Yes	SO	Yes
LT	LPPSF	Yes	Yes	Yes	SO	Yes
LT	SPS	n.a.	n.a.	n.a.	S	No
LU	SBABCM-OGBL	Yes	Yes	Yes	O	Yes
LU	LCGB-CA	Yes	Yes	Yes	O	Yes
LV	LBNA	Yes	Yes	Yes	O	Yes
LV	LCDA	No	Yes	No	SO	Yes
MT	GWU	No	No	Yes	SO	Yes
NL	FNV	Yes	Yes	Yes	O	Yes
NL	CNV Vakmensen	Yes	Yes	Yes	O	Yes
NL	LBV	No	No	Yes	SO	Yes
PL	SBiPD NSZZ Solidarność	Yes	Yes	Yes	O	Yes
PL	ZZ Budowlani	Yes	Yes	Yes	SO	Yes
PT	Feviccom	Yes	Yes	Yes	O	Yes
PT	Setaccop	Yes	Yes	Yes	SO	Yes
PT	SQTD	Yes	Yes	No	SO	Yes
PT	Fetese	Yes	Yes	Yes	O	Yes
PT	Fentcop	Yes	Yes	Yes	O	Yes
RO	FGS Familia	Yes	Yes	Yes	SO	Yes
SE	Målarna	No	No	Yes	SO	Yes
SE	Byggnads	Yes	Yes	Yes	S	No
SE	Ledarna	Yes	Yes	Yes	SO	Yes
SE	Unionen	Yes	Yes	Yes	SO	Yes
SE	SEKO	Yes	Yes	Yes	SO	Yes
SE	Sveriges Ingenjörer	Yes	Yes	Yes	SO	Yes
SE	Elektrikerna	No	No	Yes	SO	Yes
SI	SDGD	Yes	Yes	Yes	C	No
SI	SCGS	No	Yes	No	S	No

Member State (MS)	Trade union (TU)	At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	Membership domain relative to construction	Organising sectors other than construction
SK	IOZ	Yes	Yes	Yes	SO	Yes

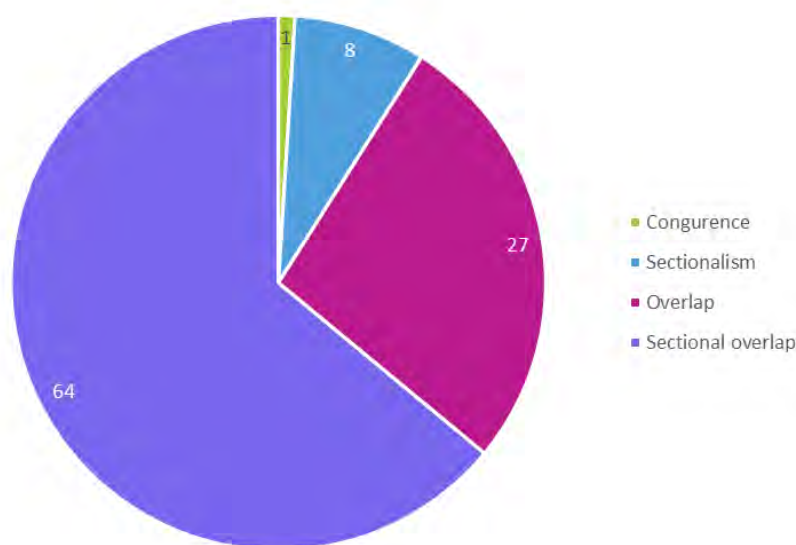
Notes: *n.a.* = not available; membership domain patterns relative to construction: C = congruence, O = overlap, S = sectionalism, SO = sectional overlap. Trade unions in **bold** are affiliated to the EFBWW.

Source: NEC

Activities related to the construction of buildings (NACE 41) is the segment least covered in terms of trade union membership, whereas specialised construction activities (NACE 43) is the segment most often covered by the trade unions' domain. However, as mentioned above, most trade unions (54 out of 77) have a broad membership domain within construction in that these organisations cover all or at least part of the activities of all three subsectors.

Figure 13 illustrates the distribution of the membership domain patterns of the sector-related trade unions relative to the construction sector.

Figure 13: Distribution of membership domain patterns of sector-related trade unions in construction (%), 2021



Notes: Percentages are rounded. N = 77.

Source: NEC

Domain demarcations resulting in overlap relative to the sector occur in 27% of all trade unions (Figure 13). In general, overlap arises from two modes of demarcation: general (cross-sectoral) domains, as can be found with ABVV-FGTB ACCG and ACLVB-CGSLB of Belgium, FNV and CNV Vakmensen of the Netherlands, Fetese of Portugal and CCOO del Hábitat and UGT FICA of Spain; and domains covering the broader construction (sometimes including the manufacture of building materials) and woodworking sector, in some cases including part of the metal, mining and other industries, as is the case for SGH of Croatia, FNCF-CFDT, FO Construction, BATI-MAT-TP CFTC,

FNSCBA CGT and UNSA I&C of France, IG BAU of Germany, ÉFÉDOSZSZ of Hungary, SBABCM-OGBL and LCGB-CA of Luxembourg, LBNA of Latvia and some other trade unions from other countries.

Sectional overlaps prevail in the sector and occur in 64% of cases. This mode usually emanates from domain demarcations that focus on certain categories of employees who are organised across several or all sectors. Employee categories are specified by various parameters, such as distinct occupations (for example, electricians, as is the case for DEF of Denmark, FEWU of Finland and Elektrikerna of Sweden; painters, as is the case for MFD of Denmark and Målarna of Sweden; or managers, as is the case for YTN of Finland, CFE-CGC BTP of France and Ledarna of Sweden) and employment status (for example, white-collar workers, as is the case for GPA of Austria, Pro of Finland and Unionen of Sweden; or blue-collar workers, as is the case for GBH and PRO-GE of Austria, ACV-CSC BIE of Belgium and 3F of Denmark).

In other cases, sectional overlaps ensue from domains covering part of the construction sector in terms of business activities (rather than in terms of employee categories) and (part of) at least one other sector. Such domains may, for instance, cover part of the local government sector (see JHL of Finland), the metalworking sector (see EEAÜL of Estonia) or the woodworking sector (see Fillea CGIL, FILCA CISL and Fenealuil of Italy).

Sectionalism is also common in the sector, albeit with a relatively small share of 8% of trade unions recording this mode of domain demarcation. Sectionalism arises primarily from the existence of sector-specific trade unions that represent particular building grades and professions or specific employee categories, such as blue-collar or white-collar workers, with no representational domain outside the construction sector.

2.1.2. Categories of workers represented

Table 19 shows the construction sector trade unions' domain coverage in terms of worker categories. Of the 77 organisations, 69 from all EU27 countries represent blue-collar workers and 57 from all but Greece represent white-collar workers. This does not come as a surprise, since blue-collar workers by far prevail in the construction sector. According to the information provided, engineers are represented by 49 trade unions from 24 Member States (all of the EU27 but Denmark, Greece and Malta) and managers are represented by 45 trade unions of 22 Member States. Whereas – according to the information available – a majority of trade unions organise and represent workers posted from abroad (43 trade unions from 18 countries), only relatively few trade unions represent undeclared workers (10 unions from only four Member States: Austria, France, Germany and Spain) and self-employed workers (20 unions from 10 Member States). IG BAU from Germany is the only trade union that organises and represents all categories of workers in the construction sector – from management to undeclared workers.

Table 19: Construction sector trade unions' domain coverage in terms of worker categories, 2021

Member State (MS)	Trade union (TU)	Blue-collar	White-collar	Engineers	Management	Self-employed	Posted	All categories
EU27	77 TUs	69 TUs	57 TUs	49 TUs	45 TUs	20 TUs	43 TUs	1 TU
	27 MSs	27 MSs	26 MSs	24 MSs	22 MSs	10 MSs	18 MSs	1 MS
EFBWW	50 TUs	47 TUs 68%	39 TUs 68%	34 TUs 69%	31 TUs 69%	16 TUs 80%	34 TUs 79%	1 TU 100%
	24 MSs Not in EE, EL, LT	24 MSs	23 MSs Not in AT	20 MSs Not in AT, DK, MT, SE	18 MSs Not in AT, DK, HU, MT, RO, SK	8 MSs Only in DE, ES, FI, IE, IT, LU, LV, NL	18 MSs Not in CZ, HU, LU, LV, MT, SK	1 MS
AT	GBH	Yes	No	No	No	No	Yes	No
AT	GPA	No	Yes	Yes	Yes	No	Yes	No
AT	PRO-GE	Yes	No	No	No	No	Yes	No
BE	ABVV-FGTB ACCG	Yes	Yes	Yes	Yes	No	Yes	No
BE	ACLVB-CGSLB	Yes	Yes	Yes	Yes	No	Yes	No
BE	ACV-CSC BIE	Yes	Yes	Yes	Yes	No	Yes	No
BE	ACV Puls ¹³							
BG	FITUC	Yes	Yes	Yes	Yes	No	Yes	No
BG	FCIW	Yes	Yes	Yes	Yes	No	Yes	No
CY	Oikodomoi-PEO	Yes	Yes	Yes	Yes	No	Yes	No
CY	Semmik-PEO	Yes	Yes	Yes	Yes	No	No	No
CY	OOIM-SEK	Yes	Yes	Yes	Yes	No	Yes	No
CY	OBIEK-SEK	Yes	Yes	Yes	Yes	Yes	No	No
CZ	OS Stavba	Yes	Yes	Yes	Yes	No	No	No
DE	IG BAU	Yes	Yes	Yes	Yes	Yes	Yes	Yes
DK	3F	Yes	No	No	No	No	Yes	No
DK	Dansk Metal	Yes	Yes	No	No	No	Yes	No
DK	DEF	Yes	Yes	No	No	No	Yes	No
DK	Blik&Rør	Yes	Yes	No	No	No	Yes	No
DK	MFD	Yes	No	No	No	No	Yes	No
EE	ETTA	Yes	Yes	No	No	No	No	No
EE	EEAÜL	Yes	Yes	Yes	Yes	No	No	No
EL	OOSEE	Yes	No	No	No	No	No	No
EL	OHMEE	Yes	No	No	Yes	No	No	No
EL	OHE	Yes	No	No	No	No	No	No

¹³ ACV Puls transferred its members to ACV-CSC BIE in 2019, and no longer has members in the construction sector.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Trade union (TU)	Blue-collar	White-collar	Engineers	Management	Self-employed	Posted	All categories
ES	CCOO del Hábitat	Yes	Yes	Yes	Yes	Yes	Yes	No
ES	ELA – Industria eta Eraikuntza	Yes	Yes	Yes	No	Yes	Yes	No
ES	UGT FICA	Yes	Yes	Yes	Yes	Yes	Yes	No
FI	RL	Yes	No	No	No	Yes	Yes	No
FI	Pro	No	Yes	Yes	Yes	No	No	No
FI	YTN	No	Yes	Yes	Yes	No	No	No
FI	JHL	Yes	No	No	No	No	No	No
FI	FEWU	Yes	No	No	No	No	Yes	No
FR	FNCB-CFDT	Yes	Yes	Yes	Yes	No	Yes	No
FR	FO Construction	Yes	Yes	Yes	Yes	No	Yes	No
FR	BATI-MAT-TP CFTC	Yes	Yes	Yes	Yes	No	Yes	No
FR	FNSCBA CGT	Yes	Yes	Yes	Yes	No	Yes	No
FR	CFE-CGC BTP	No	Yes	Yes	Yes	No	Yes	No
FR	UNSA I&C	Yes	Yes	Yes	Yes	No	Yes	No
HR	SGH	Yes	Yes	Yes	Yes	No	Yes	No
HR	NCS	Yes	Yes	Yes	Yes	No	No	No
HU	ÉFÉDOSZSZ	Yes	Yes	Yes	No	No	No	No
IE	SIPTU	Yes	Yes	No	Yes	Yes	No	No
IE	Unite	Yes	No	No	No	Yes	No	No
IE	BATU	Yes	No	No	No	Yes	Yes	No
IE	Connect	Yes	No	Yes	No	Yes	Yes	No
IE	Opatsi	Yes	No	No	No	Yes	No	No
IT	Fillea CGIL	Yes	Yes	Yes	Yes	Yes	Yes	No
IT	FILCA CISL	Yes	Yes	Yes	Yes	Yes	Yes	No
IT	Fenealuil	Yes	Yes	Yes	Yes	Yes	Yes	No
LT	LPPSF	Yes	Yes	Yes	Yes	No	No	No
LT	SPS	Yes	Yes	n.a.	n.a.	No	No	No
LU	SBABCM-OGBL	Yes	Yes	Yes	Yes	Yes	No	No
LU	LCGB-CA	Yes	Yes	Yes	Yes	Yes	No	No
LV	LBNA	Yes	Yes	Yes	Yes	Yes	No	No
LV	LCDA	Yes	Yes	Yes	Yes	No	No	No
MT	GWU	Yes	Yes	No	No	No	No	No
NL	FNV	Yes	Yes	Yes	Yes	Yes	Yes	No
NL	CNV Vakmensen	Yes	Yes	Yes	Yes	Yes	Yes	No

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Trade union (TU)	Blue-collar	White-collar	Engineers	Management	Self-employed	Posted	All categories
NL	LBV	Yes	Yes	n.a.	n.a.	n.a.	n.a.	No
PL	SBiPD NSZZ Solidarność	Yes	Yes	Yes	Yes	No	No	No
PL	ZZ Budowlani	Yes	Yes	Yes	Yes	No	Yes	No
PT	Fevicom	Yes	Yes	Yes	No	No	Yes	No
PT	Setaccop	Yes	Yes	Yes	Yes	No	Yes	No
PT	SQTD	No	Yes	No	No	No	No	No
PT	Fetese	Yes	Yes	Yes	Yes	Yes	Yes	No
PT	Fentcop	Yes	Yes	Yes	Yes	No	No	No
RO	FGS Familia	Yes	Yes	Yes	No	No	Yes	No
SE	Målarna	Yes	No	No	No	No	No	No
SE	Byggnads	Yes	No	No	No	No	Yes	No
SE	Ledarna	No	No	No	Yes	No	No	No
SE	Unionen	No	Yes	No	No	No	No	No
SE	SEKO	Yes	No	No	No	No	No	No
SE	Sveriges Ingenjörer	No	No	Yes	No	No	No	No
SE	Elektrikerna	Yes	No	No	No	No	Yes	No
SI	SDGD	Yes	Yes	Yes	Yes	No	Yes	No
SI	SCGS	Yes	Yes	Yes	Yes	No	No	No
SK	IOZ	Yes	Yes	Yes	No	No	No	No

Notes: n.a. = not available. Trade unions in **bold** are affiliated to the EFBWW. Undeclared workers are not covered in this table.

Source: NEC

Table 20 gives an overview of the construction sector trade unions' membership domain coverage in terms of company size. Almost all trade unions represent employees that work in companies with a workforce of between 10 and 249 employees. In microcompanies (1–9 employees) and large companies (250 or more employees) trade union representation is slightly lower. However, it can be assumed that most cases of trade unions not representing employees of all company size classes are because the particular size classes do not exist in a country's construction sector rather than the unions deliberately not considering employees of companies of particular size classes. However, in a few countries unionisation in small companies is impeded by legislation (Poland, Romania).

Table 20: Construction sector trade unions' domain coverage in terms of company size, 2021

Member State (MS)	Trade union (TU)	1–9 employees	10–49 employees	50–249 employees	250 or more employees	All size classes
EU27	77 TUs	67 TUs	72 TUs	74 TUs	70 TUs	63 TUs
	27 MSs	At least 23 MSs	26 MSs	27 MSs	26 MSs	At least 23 MSs
EFBWW	50 TUs	43 TUs 64%	47 TUs 65%	49 TUs 66%	48 TUs 69%	43 TUs 68%
	24 MSs Not in EE, EL, LT	21 MSs Not in PL, RO, SK	23 MSs Not in PL	24 MSs	23 MSs Not in CY	21 MSs Not in CY, PL, SK
AT	GBH	Yes	Yes	Yes	Yes	Yes
AT	GPA	Yes	Yes	Yes	Yes	Yes
AT	PRO-GE	Yes	Yes	Yes	Yes	Yes
BE	ABVV-FGTB ACCG	Yes	Yes	Yes	Yes	Yes
BE	ACLVB-CGSLB	Yes	Yes	Yes	Yes	Yes
BE	ACV-CSC BIE	Yes	Yes	Yes	Yes	Yes
BG	FITUC	Yes	Yes	Yes	Yes	Yes
BG	FCIW	No	Yes	Yes	Yes	No
CY	Oikodomoi-PEO	Yes	Yes	Yes	No	No
CY	Semmik-PEO	Yes	Yes	Yes	No	No
CY	OOIM-SEK	Yes	Yes	Yes	No	No
CY	OBIEK-SEK	Yes	Yes	Yes	No	No
CZ	OS Stavba	Yes	Yes	Yes	Yes	Yes
DE	IG BAU	Yes	Yes	Yes	Yes	Yes
DK	3F	Yes	Yes	Yes	Yes	Yes
DK	Dansk Metal	Yes	Yes	Yes	Yes	Yes
DK	DEF	No	Yes	Yes	No	No
DK	Blik&Rør	Yes	Yes	Yes	Yes	Yes
DK	MFD	Yes	Yes	Yes	Yes	Yes
EE	ETTA	Yes	Yes	Yes	Yes	Yes
EE	EEAÜL	Yes	Yes	Yes	Yes	Yes
EL	OOSEE	Yes	Yes	Yes	Yes	Yes
EL	OHMEE	Yes	Yes	Yes	Yes	Yes
EL	OHE	Yes	Yes	No	No	No
ES	CCOO del Hábitat	Yes	Yes	Yes	Yes	Yes
ES	ELA – Industria eta Eraikuntza	Yes	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Trade union (TU)	1–9 employees	10–49 employees	50–249 employees	250 or more employees	All size classes
ES	UGT FICA	Yes	Yes	Yes	Yes	Yes
FI	RL	Yes	Yes	Yes	Yes	Yes
FI	Pro	Yes	Yes	Yes	Yes	Yes
FI	YTN	Yes	Yes	Yes	Yes	Yes
FI	JHL	No	No	Yes	Yes	No
FI	FEWU	Yes	Yes	Yes	Yes	Yes
FR	FNCB-CFDT	Yes	Yes	Yes	Yes	Yes
FR	FO Construction	Yes	Yes	Yes	Yes	Yes
FR	BATI-MAT-TP CFTC	Yes	Yes	Yes	Yes	Yes
FR	FNSCBA CGT	Yes	Yes	Yes	Yes	Yes
FR	CFE-CGC BTP	Yes	Yes	Yes	Yes	Yes
FR	UNSA I&C	Yes	Yes	Yes	Yes	Yes
HR	SGH	Yes	Yes	Yes	Yes	Yes
HR	NCS	No	No	No	Yes	No
HU	ÉFÉDOSZSZ	Yes	Yes	Yes	Yes	Yes
IE	SIPTU	Yes	Yes	Yes	Yes	Yes
IE	Unite	Yes	Yes	Yes	Yes	Yes
IE	BATU	Yes	Yes	Yes	Yes	Yes
IE	Connect	Yes	Yes	Yes	Yes	Yes
IE	Opatsi	Yes	Yes	Yes	Yes	Yes
IT	Fillea CGIL	Yes	Yes	Yes	Yes	Yes
IT	FILCA CISL	Yes	Yes	Yes	Yes	Yes
IT	Fenealuil	Yes	Yes	Yes	Yes	Yes
LT	LPPSF	No	Yes	Yes	Yes	No
LT	SPS	n.a.	n.a.	n.a.	n.a.	n.a.
LU	SBABCM-OGBL	Yes	Yes	Yes	Yes	Yes
LU	LCGB-CA	Yes	Yes	Yes	Yes	Yes
LV	LBNA	Yes	Yes	Yes	Yes	Yes
LV	LCDA	Yes	Yes	Yes	Yes	Yes
MT	GWU	Yes	Yes	Yes	Yes	Yes
NL	FNV	Yes	Yes	Yes	Yes	Yes
NL	CNV Vakmensen	Yes	Yes	Yes	Yes	Yes
NL	LBV	Yes	Yes	Yes	Yes	Yes
PL	SBiPD NSZZ Solidarność	No	No	Yes	Yes	No

Member State (MS)	Trade union (TU)	1–9 employees	10–49 employees	50–249 employees	250 or more employees	All size classes
PL	ZZ Budowlani	No	No	Yes	Yes	No
PT	Fevicom	Yes	Yes	Yes	Yes	Yes
PT	Setaccop	Yes	Yes	Yes	Yes	Yes
PT	SQTD	Yes	Yes	Yes	Yes	Yes
PT	Fetese	Yes	Yes	Yes	Yes	Yes
PT	Fentcop	Yes	Yes	Yes	Yes	Yes
RO	FGS Familia	No	Yes	Yes	Yes	Yes
SE	Målarna	Yes	Yes	Yes	Yes	Yes
SE	Byggnads	Yes	Yes	Yes	Yes	Yes
SE	Ledarna	Yes	Yes	Yes	Yes	Yes
SE	Unionen	Yes	Yes	Yes	Yes	Yes
SE	SEKO	Yes	Yes	Yes	Yes	Yes
SE	Sveriges Ingenjörer	Yes	Yes	Yes	Yes	Yes
SE	Elektrikerna	Yes	Yes	Yes	Yes	Yes
SI	SDGD	Yes	Yes	Yes	Yes	Yes
SI	SCGS	Yes	Yes	Yes	Yes	Yes
SK	IOZ	No	Yes	Yes	Yes	No

Notes: *n.a.* = not available. Trade unions in **bold** are affiliated to the EFBWW.

Source: NEC

2.1.3. Membership strength

Table 21 indicates the membership strength of each individual trade union in the construction sector, in terms of absolute number of members in the sector and in terms of sectoral density, and presents the membership trend over the three years up to 2021 and the relative importance of each individual union among large companies and among SMEs. The sectoral density is calculated as the ratio of employees who are trade union members to the total number of employees in the construction sector. As can be seen from Table 21, membership in terms of absolute numbers differs widely between unions, ranging from only a few dozen members in some unions to more than 230,000 in the case of Germany's IG BAU. This considerable variation reflects differences in the size of the economy and of the sector in particular, rather than the unions' ability to attract members. Hence, density is a more appropriate measure of membership strength for a comparative analysis. This holds true despite some of the density figures gathered and calculated for the purpose of this study being potentially unreliable.

Therefore, this report considers density in reference to the sector, given that a trade union's membership within the sector and the number of employees in the sector are both provided. Overall, 54% of the trade unions with data available have a sectoral density of 5% or less, whereas sectoral density is 10% or higher in 19% of the trade unions that document figures on density. However, since in pluralist associational systems the sectoral density of an individual union tends to

decrease when the number of co-existing unions increases, it is reasonable to calculate cumulative densities by aggregating the densities of the individual trade unions in each country (see Table 21).

Table 21 includes information on the relative importance (in terms of membership numbers) of individual trade unions among large companies and among SMEs in their country. The most important unions are flagged with '1' in the corresponding columns. Table 21 also shows that in a vast majority of Member States the most important trade unions are affiliated to the EFBWW. Only in six countries is the most important trade union identified not an EFBWW member: Cyprus, Estonia, Greece, Latvia, Lithuania and Portugal.

Moreover, Table 21 also displays information about the membership trend of individual trade unions over recent years. Whereas a relative majority of unions (23) for which data are available register a stable trend over the three years covered (about 2018–2021), there are slightly fewer unions registering an increase (18) than there are registering a decrease (22). However, the data provided do not indicate a clear EU-wide trend in terms of membership evolution in the sector over the three years covered.

Table 21: Trade union membership strength and organisational density in the construction sector, 2021

Member State	Trade union	Members in the sector	Sectoral density (%)	Membership trend over three years covered (2018–2021)	Relative importance among large companies	Relative importance among SMEs
EU27	Data for 68 trade unions No data for 9 trade unions	1,049,248	8.3			
EFBWW	Data for 42 trade unions	971,833 92.6% of all trade union members	7.7% of workforce		21 × largest	21 × largest
AT	GBH	70,000	25	Increasing	1	1
AT	GPA	1,642	1	Increasing	2	2
AT	PRO-GE	n.a.	n.a.	Increasing	3	3
BE	ABVV-FGTB ACCG	50,000	24	n.a.	2	2
BE	ACLVB-CGSLB	n.a.	n.a.	n.a.	3	3
BE	ACV-CSC BIE	70,635	n.a.	Stable	1	1
BG	FITUC	900	0.6	Decreasing	2	2
BG	FCIW	2,500–3,000	2	Stable	1	1
CY	Oikodomoi-PEO	3,200	9	Stable	1	1
CY	Semmik-PEO	700	2	Decreasing	3	3
CY	OOIM-SEK	2,200	6	Decreasing	2	2
CY	OBIEK-SEK	1,120	3	Increasing	3	3
CZ	OS Stavba	5,000	1	Decreasing	1	1
DE	IG BAU	231,663	12	Stable	1	1
DK	3F	48,746	34	Stable	1	1
DK	Dansk Metal	3,500	2	Stable	3	3
DK	DEF	6,000	4	Stable	3	3
DK	Blik&Rør	8,392	6	Increasing	2	2
DK	MFD	7,000	5	Decreasing	3	3
EE	ETTA	400	1	Stable	1	1
EE	EEAÜL	100	<1	Decreasing	2	2
EL	OOSEE	17,868	13	Stable	1	1

Representativeness of the European social partner organisations: Construction sector

Member State	Trade union	Members in the sector	Sectoral density (%)	Membership trend over three years covered (2018–2021)	Relative importance among large companies	Relative importance among SMEs
EL	OHMEE	2,000	1–2	Stable	n.a.	n.a.
EL	OHE	<2,300	1–2	Stable	n.a.	n.a.
ES	CCOO del Hábitat	15,115	41.39	Stable	2	2 (members) 1 (proportion of delegates) ¹⁴
ES	ELA – Industria eta Eraikuntza	2,657	<1	Increasing	3	3
ES	UGT FICA	45,000 ¹⁵	38.73	Increasing	1	1 (members) 2 (proportion of delegates)
FI	RL	37,000	22	Decreasing	1	1
FI	Pro	4,000	2	Decreasing	3	3
FI	YTN	4,784	3	Increasing	3	3
FI	JHL	1,000	<1	n.a.	3	3
FI	FEWU	16,000	9	Increasing	2	2
FR	FNCB-CFDT	9,776	n.a.	Decreasing	1	2
FR	FO Construction	<15,000	n.a.	n.a.	3	3
FR	BATI-MAT-TP CFTC	<8,700	n.a.	n.a.	3	3
FR	FNSCBA CGT	<14,400	n.a.	n.a.	2	1
FR	CFE-CGC BTP	<5,500	n.a.	n.a.	3	3
FR	UNSA I&C	<2,000	n.a.	n.a.	3	3
HR	SGH	4,000	4	Decreasing	1	1
HR	NCS	3,200	3	Decreasing	2	n/a
HU	ÉFÉDOSZSZ	2,500	2	Decreasing	1	1
IE	SIPTU	40,000	29	Stable	1	1

¹⁴ CCOO del Hábitat indicated that it has 41.39% of the elected employee representatives affiliated, and UGT FICA indicated that it has 38.73% of the elected employee representatives in the sector in Spain.

¹⁵ UGT FICA reported 45,000 members in the construction sector, while CCOO del Hábitat reported 15,115 members in the sector. Therefore, in terms of membership, UGT FICA is the largest in the sector, while CCOO del Hábitat is the largest in terms of the proportion of the elected employee representatives.

Representativeness of the European social partner organisations: Construction sector

Member State	Trade union	Members in the sector	Sectoral density (%)	Membership trend over three years covered (2018–2021)	Relative importance among large companies	Relative importance among SMEs
IE	Unite	5,500	4	Stable	3	3
IE	BATU	2,611	2	Increasing	3	3
IE	Connect	27,000	20	Increasing	2	2
IE	Opatsi	1,000	1	Stable	3	3
IT	Fillea CGIL	n.a.	n.a.	Stable	1	1
IT	FILCA CISL	n.a.	n.a.	Stable	2	2
IT	Fenealuil	n.a.	n.a.	Stable	3	3
LT	LPPSF	200	<1	Decreasing	1	1
LT	SPS	60	<1	Stable	2	2
LU	SBABCM-OGBL	n.a.	n.a.	Increasing	1	1
LU	LCGB-CA	n.a.	n.a.	Increasing	2	2
LV	LBNA	386	<1	Decreasing	2	2
LV	LCDA	900	1–2	Decreasing	1	1
MT	GWU	500	3	Increasing	1	1
NL	FNV	n.a.	22	Decreasing	1	1
NL	CNV Vakmensen	29,000	9	Decreasing	2	2
NL	LBV	n.a.	n.a.	n.a.	3	3
PL	SBiPD NSZZ Solidarność	8,800	n.a.	Stable	1	1
PL	ZZ Budowlani	2,000	n.a.	Stable	2	2
PT	Fevicom	6,000	2	n.a.	1	1
PT	Setaccop	1,600	1	Decreasing	2	2
PT	SQTD	200	<1	n.a.	3	3
PT	Fetese	800	<1	n.a.	3	3
PT	Fentcop	85	<1	n.a.	3	3
RO	FGS Familia	25,000	7	Decreasing	1	1
SE	Målarna	9,307	3	Decreasing	3	3
SE	Byggnads	103,970	32	Decreasing	1	1

Representativeness of the European social partner organisations: Construction sector

Member State	Trade union	Members in the sector	Sectoral density (%)	Membership trend over three years covered (2018–2021)	Relative importance among large companies	Relative importance among SMEs
SE	Ledarna	17,503	5	Increasing	3	3
SE	Unionen	22,490	7	Increasing	2	2
SE	SEKO	20,000–25,000	7	Increasing	3	3
SE	Sveriges Ingenjörer	2,945	1	Increasing	3	3
SE	Elektrikerna	n.a.	n.a.	n.a.	3	3
SI	SDGD	13,000	18	Stable	1	1
SI	SCGS	4,000	5	Stable	2	2
SK	IOZ	6,000	8	Decreasing	1	1

Notes: *n.a.* = not available; *n/a* = not applicable (because trade union does not represent employees among this company size class); sectoral density in % = ratio of the number of trade union members in the sector to the total number of employees in the sector; relative importance of trade union: 1 = largest trade union in the sector in terms of membership, 2 = second largest trade union in the sector in terms of membership, 3 = smaller trade union in the sector in terms of membership. Trade unions highlighted in yellow are the most important among large companies and/or SMEs in a country; trade unions in **bold** are affiliated to the EFBWW.

Source: NEC

2.1.4. Organisational density

The overall trade union organisational density in the EU construction sector is relatively low. Low densities within the sector can be explained by a number of factors, including relatively low average skills levels and the high incidence of non-standard (and often unregistered, including bogus self-employment) and migrant work.

Table 22 shows the cumulative organisational density in each country of the trade unions covered by this study. Membership data have been collected for the majority of sector-related trade unions, namely 67 out of the total of 77 (87%). In 21 of the 27 Member States, membership data on all sector-related trade unions have been provided, so in these countries the cumulative numbers of trade union members are based on all relevant organisations in the sector (Table 22). The data available suggest a cumulative trade union membership in the construction sector of at least one million across the EU27, which corresponds to about 11–15% of the sectoral employees of the whole EU27 – dependent on the size of the sectoral workforce, which differs according to the sources used, that is, the NEC or the EU-LFS. Given that membership data are lacking for 10 trade unions in six countries, it can be inferred that the cumulative membership and thus the cumulative organisational density of trade unions in the construction sector is slightly higher than the 11–15% indicated in Table 22.

Table 22: Cumulative trade union organisational density in the construction sector, 2021

Member State	Employees according to the NEC*	Employees according to the EU-LFS	Cumulative trade union members	Trade unions with data	Trade unions in total	Trade union density according to the NEC (%)	Trade union density according to the EU-LFS (%)
AT	278,387	291,100	71,642	2	3	26	25
BE	208,472	220,600	120,635	2	3	58	55
BG	149,229	232,800	3,400	2	2	2	1
CY	34,080	35,500	7,220	4	4	21	20
CZ	386,970	252,200	5,000	1	1	1	2
DE	1,890,650	2,037,800	231,663	1	1	12	11
DK	143,201**	150,900	73,638	5	5	51	49
EE	48,456	43,700	500	2	2	1	1
EL	138,895	82,900	<22,168	3	3	<16	<27
ES	893,773	945,900	62,772	3	3	7	7
FI	171,347	139,900	62,784	5	5	37	45
FR	n.a.	1,368,700	<55,376	6	6	n.a.	<4
HR	105,415	103,300	7,200	2	2	7	7
HU	n.a.	283,100	2,500	1	1	n.a.	1
IE	n.a.	96,300	76,111	5	5	n.a.	79
IT	1,320,575***	917,900	n.a.	0	3	n.a.	n.a.
LT	96,698	78,400	260	2	2	0	0
LU	n.a.	14,100	n.a.	0	2	n.a.	n.a.
LV	70,252	59,800	1,286	2	2	2	2
MT	18,869	9,000	500	1	1	3	6
NL	336,200	266,700	29,000	1	3	9	11
PL	n.a.	929,600	10,800	2	2	n.a.	1

PT	241,803	218,800	8,685	5	5	4	4
RO	385,016	599,600	25,000	1	1	6	4
SE	327,000	263,800	176,215	6	7	54	67
SI	73,297	39,100	17,000	2	2	23	43
SK	78,587	132,100	6,000	1	1	8	5
EU27	7,397,172	9,813,500	1,077,825	67	77	15	11

* Data stem from different years in 2018–2021; ** figure is based on full-time equivalent and includes NACE 43.99; *** figure refers to employment rather than employees.

Notes: n.a. = not available. Data on cumulative densities per country exclude those trade unions for which membership data were not available and should therefore be treated with caution. EU27 totals are correct but may not match the totals of the rows above (for example, due to missing information or approximations).

Sources: NEC and EU-LFS data

2.2. Trade union involvement in collective bargaining

In the previous section, the trade unions' membership domains relative to the construction sector and their membership strength were considered. In this section, their involvement in collective bargaining is analysed. Table 23 indicates whether trade unions are involved in single- and/or multi-employer bargaining related to construction. Single-employer bargaining covers only the workforce employed by a specific employer, while multi-employer bargaining covers all employees of the member companies of the employer organisations that are party to an agreement. Table 23 also includes information on the collective bargaining coverage of the different construction subsectors.

Table 23 shows that there is at least one trade union involved in collective bargaining in all Member States. Four trade unions out of the 77 do not engage in collective bargaining related to the construction sector: OOSEE and OHMEE of Greece, which used to be involved in collective bargaining some years ago; YTN of Finland, which is de facto involved in bargaining but does not act as signatory party to the agreements; and SPS of Lithuania. In addition, 64 of the 77 sector-related trade unions engage in sector-level (or national-level) multi-employer collective bargaining, and 62 trade unions engage in company-level bargaining (mostly in the form of complementary single-employer bargaining in addition to multi-employer bargaining). Nine trade unions in seven countries engage in exclusive single-employer bargaining.

Overall, 23 of the 77 trade unions are signatory parties to collective agreements that cover at least 90% of the sectoral workforce of their countries, and 21 of these are affiliated to the EFBWW. Moreover, 33 organisations conclude collective agreements covering at least 50% of the sectoral workforce (Table 23). Those 23 trade unions with a collective bargaining coverage of 90% or more stem from 10 countries: Belgium, Croatia, Cyprus, France, Hungary, Italy, Latvia, Luxembourg, the Netherlands and Spain. In all these countries but Croatia and Hungary (and also in some of the countries with trade unions with a collective bargaining coverage of 50% or more), several trade unions form bargaining cartels so that they can jointly negotiate and sign the same agreement(s) applicable to the sector in their countries. Another group, consisting of 18 trade unions from 10 countries, are signatories to collective agreements covering only 5% or less of the construction sector's workforce in their countries. The reason for these extremely low sector coverage rates is either a high fragmentation of the associational landscape (there are some trade unions with a very particular and narrow membership domain that conclude agreements for a small, specific occupational group or a specific category of workers within the sector, such as PRO-GE in Austria,

FITUC in Bulgaria, Pro and JHL in Finland, LBV in the Netherlands, Fentcop in Portugal and Ledarna and Sveriges Ingenjörer in Sweden) or general problems that sectoral trade unions face in relation to recruiting members in some countries (Estonia, Greece, Lithuania and Romania).

Table 23: Collective bargaining involvement of construction sector trade unions and subsector coverage, 2021

Member State (MS)	Trade union (TU)	Collective bargaining involvement at sector level	Collective bargaining involvement at company level	% of sectoral workforce covered	Covers at least part of NACE 41	Covers at least part of NACE 42	Covers at least part of NACE 43
EU27	77 TUs	64 TUs	62 TUs		55 TUs	61 TUs	66 TUs
	27 MSs	23 MSs Not in EE, LT, MT, PL	24 MSs Not in AT, EL, PT		23 MSs Not in EE, EL, LT, MT	25 MSs Not in EL, MT	25 MSs Not in EE, PL
EFBWW	50 TUs	46 TUs 72%	47 TUs 76%		43 TUs 78%	42 TUs 69%	47 TUs 71%
	24 MSs	22 MSs Not in MT, PL	22 MSs Not in AT, PT		23 MSs Not in MT	23 MSs Not in MT	23 MSs Not in PL
AT	GBH	Yes	No	70–80	Yes	Yes	Yes
AT	GPA	Yes	No	20–30	Yes	Yes	Yes
AT	PRO-GE	Yes	No	1–2	No	No	Yes
BE	ABVV-FGTB ACCG	Yes	Yes	90–100	Yes	Yes	Yes
BE	ACLVB-CGSLB	Yes	Yes	90–100	Yes	Yes	Yes
BE	ACV-CSC BIE	Yes	Yes	100	Yes	Yes	Yes
BG	FITUC	Yes	Yes	<1	Yes	No	No
BG	FCIW	Yes	Yes	<10	Yes	Yes	Yes
CY	Oikodomoi-PEO	Yes	Yes	100	Yes	Yes	Yes
CY	Semmik-PEO	Yes	Yes	6	No	Yes	Yes
CY	OOIM-SEK	Yes	Yes	100	Yes	Yes	Yes
CY	OBIEK-SEK	Yes	Yes	6	No	Yes	Yes
CZ	OS Stavba	Yes	Yes	17	Yes	Yes	Yes
DE	IG BAU	Yes	Yes	n.a.	Yes	Yes	Yes
DK	3F	Yes	Yes	60	Yes	Yes	Yes
DK	Dansk Metal	Yes	Yes	n.a.	No	No	Yes
DK	DEF	Yes	Yes	n.a.	No	Yes	Yes
DK	Blik&Rør	Yes	No	n.a.	No	No	Yes
DK	MFD	Yes	Yes	6	Yes	Yes	Yes
EE	ETTA	No	Yes	<1	No	Yes	No
EE	EEAÜL	No	Yes	<1	No	Yes	No

Representativeness of the European social partner organisations: Construction sector

EL	OOSEE	No*	No	0	n/a	n/a	n/a
EL	OHMEE	No*	No	0	n/a	n/a	n/a
EL	OHE	Yes	No	3	No	No	Yes
ES	CCOO del Hábitat	Yes	Yes	100	Yes	Yes	Yes
ES	ELA – Industria eta Eraikuntza	Yes	Yes	100**	Yes	Yes	Yes
ES	UGT FICA	Yes	Yes	100	Yes	Yes	Yes
FI	RL	Yes	Yes	50	Yes	No	Yes
FI	Pro	Yes	Yes	5	Yes	Yes	Yes
FI	YTN***	No	No	0	n/a	n/a	n/a
FI	JHL	No	Yes	1	No	Yes	No
FI	FEWU	Yes	Yes	10–15	No	Yes	Yes
FR	FNCB-CFDT	Yes	Yes	100	Yes	Yes	Yes
FR	FO Construction	Yes	Yes	100	Yes	Yes	Yes
FR	BATI-MAT-TP CFTC	Yes	Yes	100	Yes	Yes	Yes
FR	FNSCBA CGT	Yes	Yes	100	Yes	Yes	Yes
FR	CFE-CGC BTP	Yes	Yes	100	Yes	Yes	Yes
FR	UNSA I&C	Yes	Yes	34	Yes	No	Yes
HR	SGH	Yes	Yes	100	Yes	Yes	Yes
HR	NCS	No	Yes	n.a.	No	No	Yes
HU	ÉFÉDOSZSZ	Yes	Yes	100	Yes	Yes	Yes
IE	SIPTU	Yes	Yes	65	Yes	Yes	Yes
IE	Unite	Yes	Yes	65	Yes	Yes	Yes
IE	BATU	Yes	Yes	65	Yes	Yes	Yes
IE	Connect	Yes	Yes	65	Yes	Yes	Yes
IE	Opatsi	Yes	Yes	65	Yes	Yes	Yes
IT	Fillea CGIL	Yes	Yes	95	Yes	Yes	Yes
IT	FILCA CISL	Yes	Yes	95	Yes	Yes	Yes
IT	Fenealuil	Yes	Yes	95	Yes	Yes	Yes
LT	LPPSF	No	Yes	1	No	Yes	Yes
LT	SPS	No	No	0	n/a	n/a	n/a
LU	SBABCM-OGBL	Yes	Yes	95	Yes	Yes	Yes
LU	LCGB-CA	Yes	Yes	95	Yes	Yes	Yes
LV	LBNA	Yes	Yes	100	Yes	Yes	Yes
LV	LCDA	No	Yes	7	No	Yes	No
MT	GWU	No	Yes	n.a.	No	No	Yes
NL	FNV	Yes	Yes	>95	Yes	Yes	Yes

NL	CNV Vakmensen	Yes	Yes	>95	Yes	Yes	Yes
NL	LBV	Yes	No	<5	No	No	Yes
PL	SBiPD NSZZ Solidarność	No	Yes	n.a.	Yes	Yes	No
PL	ZZ Budowlani	No	Yes	n.a.	Yes	Yes	No
PT	Feviccom	Yes	No	38	Yes	Yes	Yes
PT	Setaccop	Yes	No	47	Yes	Yes	Yes
PT	SQTD	Yes	No	38	Yes	Yes	Yes
PT	Fetese	Yes	No	15	Yes	Yes	Yes
PT	Fentcop	Yes	No	<1	Yes	Yes	Yes
RO	FGS Familia	Yes	Yes	1–2	Yes	Yes	Yes
SE	Målarna	Yes	Yes	3	No	No	Yes
SE	Byggnads	Yes	Yes	65	Yes	Yes	Yes
SE	Ledarna	Yes	Yes	5	Yes	Yes	Yes
SE	Unionen	Yes	Yes	11	Yes	Yes	Yes
SE	SEKO	Yes	Yes	7	Yes	Yes	Yes
SE	Sveriges Ingenjörer	Yes	Yes	1	Yes	Yes	Yes
SE	Elektrikerna	Yes	Yes	7	No	No	Yes
SI	SDGD	Yes	Yes	<40	Yes	Yes	Yes
SI	SCGS	Yes	Yes	n.a.	Yes	Yes	Yes
SK	IOZ	Yes	Yes	80	Yes	Yes	Yes

* Used to be involved in sectoral collective bargaining some years ago; ** at regional level only; *** YTN is de facto involved in collective bargaining but does not act as a signatory party to the agreements.

Notes: n.a. = not available; n/a = not applicable. Trade unions in **bold** are affiliated to the EFBWW.

Source: NEC

Table 23 also provides information on the coverage in terms of construction subsectors of the collective bargaining in which the trade unions are involved: 50 of the 77 trade unions conclude collective agreements covering all three subsectors according to NACE 41, 42 and 43, in that at least part of each of these subsectors is covered. This, however, does not necessarily indicate a broad membership domain relative to the sector in all cases, since there are some trade unions with a very particularistic membership domain relative to the sector that form bargaining cartels with other trade unions covering other or all parts of the sector, meaning that collective agreements may have a purview extending the membership domain of individual signatories to these agreements.

This partially holds true for the coverage in terms of type and category of workers (Table 24). Collective agreements concluded by sector-related trade unions most frequently cover blue-collar workers (who constitute a vast majority of workers in the sector) and slightly less frequently cover white-collar workers and engineers. Managers and posted workers are covered by about half of the collective agreements signed by the sector-related trade unions, while only a minority of agreements cover self-employed workers. With regard to managers, posted workers and self-

employed workers, it is important to note that the number of trade unions with a membership domain including these types of workers is larger than the number of trade unions that have concluded a collective agreement covering these groups of workers. This means that collective agreements in the construction sector tend to target standard employment relationships and rank-and-file employees rather than managers and non-standard workers.

Table 24: Collective bargaining involvement of construction sector trade unions and coverage in terms of type/category of workers, 2021

Member State (MS)	Trade union (TU)	Collective bargaining involvement	Blue-collar	White-collar	Engineers	Management	Self-employed	Posted workers
EU27	77 TUs	73 TUs	66 TUs	54 TUs	45 TUs	35 TUs	10 TUs	38 TUs
	27 MSs	27 MSs	27 MSs	25 MSs Not in EL, IE	22 MSs Not in DK, EL, IE, LU, MT	18 MSs Not in DE, DK, EL, HU, IT, LU, MT, RO, SK	4 MSs Only in CY, HR, IE, PT	16 MSs Not in CZ, DE, EE, EL, HU, IT, LV, MT, PL, SI, SK
EFBWW	50 TUs	50 TUs	47 TUs	38 TUs	31 TUs	24 TUs	5 TUs	32 TUs
		68%	71%	70%	69%	69%	50%	84%
	24 MSs	24 MSs	24 MSs	22 MSs	17 MSs	15 MSs	2 MSs Only in HR, IE	16 MSs
AT	GBH	MEB	Yes	No	No	No	No	Yes
AT	GPA	MEB	No	Yes	Yes	Yes	No	Yes
AT	PRO-GE	MEB	Yes	No	No	No	No	Yes
BE	ABVV-FGTB ACCG	MEB + SEB	Yes	Yes	Yes	No	No	Yes
BE	ACLVB-CGSLB	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
BE	ACV-CSC BIE	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
BG	FITUC	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
BG	FCIW	MEB + SEB	Yes	Yes	Yes	Yes	No	No
CY	Oikodomoi-PEO	MEB + SEB	Yes	Yes	Yes	Yes	Yes	Yes
CY	Semmik-PEO	MEB + SEB	Yes	Yes	Yes	Yes	Yes	No
CY	OOIM-SEK	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
CY	OBIEK-SEK	MEB + SEB	Yes	Yes	Yes	Yes	Yes	No
CZ	OS Stavba	MEB + SEB	Yes	Yes	Yes	Yes	No	No
DE	IG BAU	MEB + SEB	Yes	Yes	Yes	No	No	No
DK	3F	MEB + SEB	Yes	No	No	No	No	Yes
DK	Dansk Metal	MEB + SEB	Yes	Yes	No	No	No	Yes
DK	DEF	MEB + SEB	Yes	Yes	No	No	No	Yes

Representativeness of the European social partner organisations: Construction sector

DK	Blik&Rør	MEB	Yes	Yes	No	No	No	Yes
DK	MFD	MEB + SEB	Yes	No	No	No	No	Yes
EE	ETTA	SEB	Yes	Yes	No	No	No	No
EE	EEAÜL	SEB	Yes	Yes	Yes	Yes	No	No
EL	OOSEE	No*	n/a	n/a	n/a	n/a	n/a	n/a
EL	OHMEE	No*	n/a	n/a	n/a	n/a	n/a	n/a
EL	OHE	MEB	Yes	No	No	No	No	No
ES	CCOO del Hábitat	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
ES	ELA – Industria eta Eraikuntza	MEB + SEB	Yes	Yes	Yes	No	No	No
ES	UGT FICA	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
FI	RL	MEB + SEB	Yes	No	No	No	No	Yes
FI	Pro	MEB + SEB	No	Yes	Yes	Yes	No	No
FI	YTN**	No	n/a	n/a	n/a	n/a	n/a	n/a
FI	JHL	SEB	Yes	No	No	No	No	No
FI	FEWU	MEB + SEB	Yes	No	No	No	No	No
FR	FNCB-CFDT	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
FR	FO Construction	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
FR	BATI-MAT-TP CFTC	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
FR	FNSCBA CGT	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
FR	CFE-CGC BTP	MEB + SEB	No	Yes	Yes	Yes	No	Yes
FR	UNSA I&C	MEB + SEB	No	Yes	No	No	No	Yes
HR	SGH	MEB + SEB	Yes	Yes	Yes	Yes	Yes	Yes
HR	NCS	SEB	Yes	Yes	Yes	Yes	Yes	Yes
HU	ÉFÉDOSZSZ	MEB + SEB	Yes	Yes	Yes	No	No	No
IE	SIPTU	MEB + SEB	Yes	No	No	Yes	Yes	No
IE	Unite	MEB + SEB	Yes	No	No	No	Yes	No
IE	BATU	MEB + SEB	Yes	No	No	No	No	No
IE	Connect	MEB + SEB	Yes	No	No	No	Yes	Yes
IE	Opatsi	MEB + SEB	Yes	No	No	No	Yes	No
IT	Fillea CGIL	MEB + SEB	Yes	Yes	Yes	No	No	Yes
IT	FILCA CISL	MEB + SEB	Yes	Yes	Yes	No	No	Yes
IT	Fenealuil	MEB + SEB	Yes	Yes	Yes	No	No	Yes
LT	LPPSF	SEB	Yes	Yes	Yes	Yes	No	No
LT	SPS	No	n/a	n/a	n/a	n/a	n/a	n/a
LU	SBABCM-OGBL	MEB + SEB	Yes	Yes	No	No	No	Yes
LU	LCGB-CA	MEB + SEB	Yes	Yes	No	No	No	Yes

Representativeness of the European social partner organisations: Construction sector

LV	LBNA	MEB + SEB	Yes	Yes	Yes	Yes	No	No
LV	LCDA	SEB	Yes	Yes	Yes	Yes	No	No
MT	GWU	SEB	Yes	Yes	No	No	No	No
NL	FNV	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
NL	CNV Vakmensen	MEB + SEB	Yes	Yes	Yes	Yes	No	Yes
NL	LBV	MEB	Yes	Yes	No	Yes	No	Yes
PL	SBiPD NSZZ Solidarność	SEB	Yes	Yes	Yes	Yes	No	No
PL	ZZ Budowlani	SEB	Yes	Yes	Yes	Yes	No	No
PT	Fevicom	MEB	Yes	Yes	Yes	No	No	No
PT	Setaccop	MEB	Yes	Yes	Yes	Yes	No	Yes
PT	SQTD	MEB	Yes	Yes	Yes	No	No	No
PT	Fetese	MEB	Yes	Yes	Yes	Yes	No	No
PT	Fentcop	MEB	Yes	Yes	Yes	Yes	Yes	No
RO	FGS Familia	MEB + SEB	Yes	Yes	Yes	No	No	Yes
SE	Målarna	MEB + SEB	Yes	No	No	No	No	No
SE	Byggnads	MEB + SEB	Yes	No	No	No	No	Yes
SE	Ledarna	MEB + SEB	No	No	No	Yes	No	No
SE	Unionen	MEB + SEB	No	Yes	No	No	No	No
SE	SEKO	MEB + SEB	Yes	No	No	No	No	No
SE	Sveriges Ingenjörer	MEB + SEB	No	No	Yes	No	No	No
SE	Elektrikerna	MEB + SEB	Yes	No	No	No	No	Yes
SI	SDGD	MEB + SEB	Yes	Yes	Yes	Yes	No	No
SI	SCGS	MEB + SEB	Yes	Yes	Yes	No	No	No
SK	IOZ	MEB + SEB	Yes	Yes	Yes	No	No	No

* Used to be involved in sectoral collective bargaining some years ago; ** YTN is de facto involved in collective bargaining but does not act as a signatory party to the agreements.

Notes: n/a = not applicable; MEB = multi-employer bargaining; SEB = single-employer bargaining. Trade unions in **bold** are affiliated to the EFBWW.

Source: NEC

Table 25 shows that the collective bargaining the trade unions are involved in usually covers employees working in all size classes of companies in the sector. Only in some countries are there trade unions that conclude collective agreements that are applicable to only particular size classes. In most of these cases, limitations of applicability in terms of size classes result from single-employer bargaining, in that a trade union concludes a collective agreement for a specific company that falls within a certain size class (see NCS of Croatia, ETTA and EEAÜL of Estonia, JHL of Finland, LCDA of Latvia, LPPSF of Lithuania and SBiPD NSZZ Solidarność and ZZ Budowlani of Poland). Moreover, there are a very few cases where a trade union is involved in multi-employer bargaining and the coverage of the agreement is limited in terms of company size classes. These limitations are for a similarly

trivial reason: the collective agreement targets and covers a business segment of the construction sector where one or more particular size classes do not exist. Agreements of this kind have been concluded by FCIW of Bulgaria, DEF of Denmark, FGS Familia of Romania and IOZ of Slovakia.

Table 25: Collective bargaining involvement of construction sector trade unions and coverage in terms of company size classes, 2021

Member State (MS)	Trade union (TU)	Collective bargaining involvement	1–9 employees	10–49 employees	50–249 employees	250 or more employees
EU27	77 TUs	73 TUs	61 TUs	65 TUs	65 TUs	71 TUs
	27 MSs	27 MSs	22 MSs	23 MSs	24 MSs	26 MSs
EFBWW	50 TUs	50 TUs 68%	43 TUs 70%	46 TUs 71%	46 TUs 71%	49 TUs 69%
	24 MSs	24 MSs	21 MSs Not in PL, RO, SK	22 MSs Not in PL, SK	23 MSs Not in PL	24 MSs
AT	GBH	MEB	Yes	Yes	Yes	Yes
AT	GPA	MEB	Yes	Yes	Yes	Yes
AT	PRO-GE	MEB	Yes	Yes	Yes	Yes
BE	ABVV-FGTB ACCG	MEB + SEB	Yes	Yes	Yes	Yes
BE	ACLVB-CGSLB	MEB + SEB	Yes	Yes	Yes	Yes
BE	ACV-CSC BIE	MEB + SEB	Yes	Yes	Yes	Yes
BG	FITUC	MEB + SEB	Yes	Yes	Yes	Yes
BG	FCIW	MEB + SEB	No	Yes	Yes	Yes
CY	Oikodomoi-PEO	MEB + SEB	Yes	Yes	Yes	Yes
CY	Semmik-PEO	MEB + SEB	Yes	Yes	Yes	Yes
CY	OOIM-SEK	MEB + SEB	Yes	Yes	Yes	Yes
CY	OBIEK-SEK	MEB + SEB	Yes	Yes	Yes	Yes
CZ	OS Stavba	MEB + SEB	Yes	Yes	Yes	Yes
DE	IG BAU	MEB + SEB	Yes	Yes	Yes	Yes
DK	3F	MEB + SEB	Yes	Yes	Yes	Yes
DK	Dansk Metal	MEB + SEB	Yes	Yes	Yes	Yes
DK	DEF	MEB + SEB	No	Yes	No	No
DK	Blik&Rør	MEB	Yes	Yes	Yes	Yes
DK	MFD	MEB + SEB	Yes	Yes	Yes	Yes
EE	ETTA	SEB	No	No	No	Yes
EE	EEAÜL	SEB	No	No	No	Yes
EL	OOSEE	No*	n/a	n/a	n/a	n/a
EL	OHMEE	No*	n/a	n/a	n/a	n/a
EL	OHE	MEB	Yes	Yes	n.a.	n.a.
ES	CCOO del Hábitat	MEB + SEB	Yes	Yes	Yes	Yes
ES	ELA – Industria eta Eraikuntza	MEB + SEB	Yes	Yes	Yes	Yes
ES	UGT FICA	MEB + SEB	Yes	Yes	Yes	Yes
FI	RL	MEB + SEB	Yes	Yes	Yes	Yes
FI	Pro	MEB + SEB	Yes	Yes	Yes	Yes
FI	YTN**	No	n/a	n/a	n/a	n/a
FI	JHL	SEB	No	No	No	Yes
FI	FEWU	MEB + SEB	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Construction sector

FR	FNCB-CFDT	MEB + SEB	Yes	Yes	Yes	Yes
FR	FO Construction	MEB + SEB	Yes	Yes	Yes	Yes
FR	BATI-MAT-TP CFTC	MEB + SEB	Yes	Yes	Yes	Yes
FR	FNSCBA CGT	MEB + SEB	Yes	Yes	Yes	Yes
FR	CFE-CGC BTP	MEB + SEB	Yes	Yes	Yes	Yes
FR	UNSA I&C	MEB + SEB	Yes	Yes	Yes	Yes
HR	SGH	MEB + SEB	Yes	Yes	Yes	Yes
HR	NCS	SEB	No	No	No	Yes
HU	ÉFÉDOSZSZ	MEB + SEB	Yes	Yes	Yes	Yes
IE	SIPTU	MEB + SEB	Yes	Yes	Yes	Yes
IE	Unite	MEB + SEB	Yes	Yes	Yes	Yes
IE	BATU	MEB + SEB	Yes	Yes	Yes	Yes
IE	Connect	MEB + SEB	Yes	Yes	Yes	Yes
IE	Opatsi	MEB + SEB	Yes	Yes	Yes	Yes
IT	Fillea CGIL	MEB + SEB	Yes	Yes	Yes	Yes
IT	FILCA CISL	MEB + SEB	Yes	Yes	Yes	Yes
IT	Fenealuil	MEB + SEB	Yes	Yes	Yes	Yes
LT	LPPSF	SEB	No	No	Yes	Yes
LT	SPS	No	n/a	n/a	n/a	n/a
LU	SBABCM-OGBL	MEB + SEB	Yes	Yes	Yes	Yes
LU	LCGB-CA	MEB + SEB	Yes	Yes	Yes	Yes
LV	LBNA	MEB + SEB	Yes	Yes	Yes	Yes
LV	LCDA	SEB	No	Yes	Yes	Yes
MT	GWU	SEB	Yes	Yes	Yes	Yes
NL	FNV	MEB + SEB	Yes	Yes	Yes	Yes
NL	CNV Vakmensen	MEB + SEB	Yes	Yes	Yes	Yes
NL	LBV	MEB	Yes	Yes	Yes	Yes
PL	SBiPD NSZZ Solidarność	SEB	No	No	No	Yes
PL	ZZ Budowlani	SEB	No	No	No	Yes
PT	Fevicom	MEB	Yes	Yes	Yes	Yes
PT	Setaccop	MEB	Yes	Yes	Yes	Yes
PT	SQTD	MEB	Yes	Yes	Yes	Yes
PT	Fetese	MEB	Yes	Yes	Yes	Yes
PT	Fentcop	MEB	Yes	Yes	Yes	Yes
RO	FGS Familia	MEB + SEB	No	Yes	Yes	Yes
SE	Målarna	MEB + SEB	Yes	Yes	Yes	Yes
SE	Byggnads	MEB + SEB	Yes	Yes	Yes	Yes
SE	Ledarna	MEB + SEB	Yes	Yes	Yes	Yes
SE	Unionen	MEB + SEB	Yes	Yes	Yes	Yes
SE	SEKO	MEB + SEB	Yes	Yes	Yes	Yes
SE	Sveriges Ingenjörer	MEB + SEB	Yes	Yes	Yes	Yes
SE	Elektrikerna	MEB + SEB	Yes	Yes	Yes	Yes
SI	SDGD	MEB + SEB	Yes	Yes	Yes	Yes
SI	SCGS	MEB + SEB	Yes	Yes	Yes	Yes
SK	IOZ	MEB + SEB	No	No	Yes	Yes

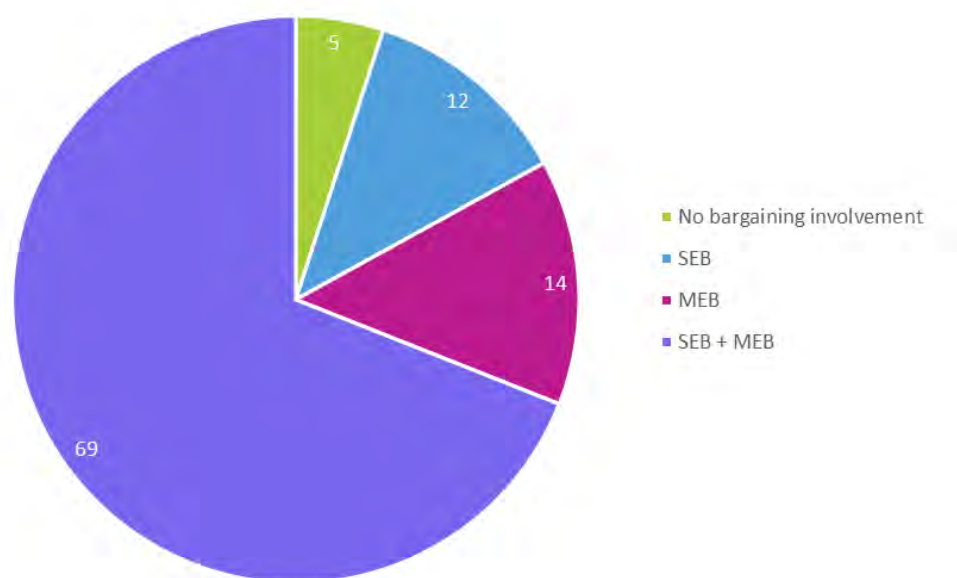
* Used to be involved in sectoral collective bargaining some years ago; ** = YTN is de facto involved in collective bargaining but does not act as a signatory party to the agreements.

Notes: n.a. = not available; n/a = not applicable; MEB = multi-employer bargaining; SEB = single-employer bargaining; Trade unions in **bold** are affiliated to the EFBWW.

Source: NEC

Figure 14 shows the form of involvement of trade unions in collective bargaining related to the construction sector more clearly. Overall, 5% of the trade unions are not engaged in collective bargaining activities at all, while 14% are involved in only multi-employer bargaining and 12% in only single-employer bargaining. A vast majority of trade unions are involved in both single-employer and multi-employer bargaining (69%).

Figure 14: Involvement of construction sector trade unions in different forms of collective bargaining (%), 2021



Notes: MEB, multi-employer bargaining; SEB = single-employer bargaining. Percentages are rounded. N = 77.

Source: NEC

2.3. Trade union involvement in social dialogue and consultation practices

In this section, the sector-related trade unions' involvement in policymaking related to the construction sector is analysed. More precisely, this section looks at the trade unions' involvement in bipartite or tripartite social dialogue related to the construction sector and in paritarian organisations dealing with sector-related issues. Moreover, it assesses whether the trade unions are consulted by governments on sector-related matters (Table 26).

Of the 77 trade unions covered by this study, 52 of those for which data have been provided are involved in bipartite or tripartite social dialogue structures related to the construction sector. A list of social dialogue bodies, indicating the participating trade unions and employer organisations, is included in Section 2.8.

At least 35 trade unions (information is not available for all unions) participate in paritarian organisations dealing with sector-related issues. Paritarian organisations are jointly established and managed by trade union and employer organisation representatives, and deal with social and health issues, such as pension schemes, vacation and holiday schemes, occupational health, care issues and unemployment benefit funds. A list of sector-related paritarian organisations, including the trade unions and employer organisations/business associations involved, is provided in Section 2.9.

Consultation between governments and trade unions about sector-related issues involves 53 of those unions with data available. Consultation takes place regularly with 20 trade unions and on an ad hoc basis with 29 unions, while for 4 organisations consultation practices have not been specified. For six organisations, the information is not available (Table 26).

Table 26: Involvement of construction sector trade unions in social dialogue and consultation practices, 2021

Member State (MS)	Trade union (TU)	Involvement in bipartite/tripartite social dialogue	Involvement in paritarian organisation	Consultation by government
EU27	77 TUs	52 TUs	35 TUs	53 TUs
	27 MSs	21 MSs	12 MSs	24 MSs
EFBWW	50 TUs	42 TUs 81%	29 TUs 83%	41 TUs 77%
	24 MSs	20 MSs	12 MSs	21 MSs
AT	GBH	Yes	Yes	Ad hoc
AT	GPA	No	No	No
AT	PRO-GE	n.a.	No	n.a.
BE	ABVV-FGTB ACCG	Yes	Yes	Regularly
BE	ACLVB-CGSLB	Yes	Yes	Regularly
BE	ACV-CSC BIE	Yes	Yes	Regularly
BG	FITUC	Yes	No	No
BG	FCIW	Yes	No	Regularly
CY	Oikodomoi-PEO	No	Yes	No
CY	Semmik-PEO	No	No	No
CY	OOIM-SEK	No	Yes	Ad hoc
CY	OBIEK-SEK	No	Yes	Ad hoc
CZ	OS Stavba	Yes	No	Ad hoc
DE	IG BAU	Yes	Yes	Ad hoc
DK	3F	Yes	Yes	Ad hoc
DK	Dansk Metal	Yes	Yes	Regularly
DK	DEF	Yes	Yes	Regularly
DK	Blik&Rør	Yes	Yes	Ad hoc
DK	MFD	Yes	Yes	Ad hoc
EE	ETTA	No	No	Ad hoc
EE	EEAÜL	No	No	No
EL	OOSEE	No	No	No
EL	OHMEE	No	No	Yes
EL	OHE	No	No	Ad hoc
ES	CCOO del Hábitat	Yes	Yes	Regularly
ES	ELA – Industria eta Eraikuntza	No	No	No

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Trade union (TU)	Involvement in bipartite/tripartite social dialogue	Involvement in paritarian organisation	Consultation by government
ES	UGT FICA	Yes	Yes	Regularly
FI	RL	Yes	No	Ad hoc
FI	Pro	Yes	No	Ad hoc
FI	YTN	Yes	No	Ad hoc
FI	JHL	No	No	n.a.
FI	FEWU	Yes	No	No
FR	FNCB-CFDT	Yes	Yes	Regularly
FR	FO Construction	Yes	Yes	Regularly
FR	BATI-MAT-TP CFTC	Yes	Yes	Ad hoc
FR	FNSCBA CGT	Yes	Yes	Regularly
FR	CFE-CGC BTP	Yes	Yes	Ad hoc
FR	UNSA I&C	Yes	Yes	No
HR	SGH	Yes	No	Regularly
HR	NCS	No	No	No
HU	ÉFÉDOSZSZ	Yes	No	No
IE	SIPTU	Yes	Yes	Ad hoc
IE	Unite	Yes	Yes	Ad hoc
IE	BATU	Yes	Yes	Ad hoc
IE	Connect	Yes	Yes	Ad hoc
IE	Opatsi	Yes	Yes	Ad hoc
IT	Fillea CGIL	Yes	Yes	Ad hoc
IT	FILCA CISL	Yes	Yes	Ad hoc
IT	Fenealuil	Yes	Yes	Ad hoc
LT	LPPSF	No	No	Ad hoc
LT	SPS	No	No	Ad hoc
LU	SBABCM-OGBL	No	No	No
LU	LCGB-CA	No	No	No
LV	LBNA	Yes	No	Ad hoc
LV	LCDA	Yes	No	No
MT	GWU	Yes	No	Regularly
NL	FNV	Yes	Yes	Regularly
NL	CNV Vakmensen	Yes	Yes	Regularly
NL	LBV	Yes	n.a.	n.a.
PL	SBiPD NSZZ Solidarność	Yes	No	Ad hoc
PL	ZZ Budowlani	Yes	No	Regularly
PT	Feviccom	Yes	No	No
PT	Setaccop	No	No	Ad hoc
PT	SQTD	No	No	No
PT	Fetese	No	No	n.a.
PT	Fentcop	No	No	No
RO	FGS Familia	No	Yes	No
SE	Målarna	No	No	n.a.
SE	Byggnads	Yes	Yes	Regularly

Member State (MS)	Trade union (TU)	Involvement in bipartite/tripartite social dialogue	Involvement in paritarian organisation	Consultation by government
SE	Ledarna	Yes	No	n.a.
SE	Unionen	Yes	No	Regularly
SE	SEKO	Yes	Yes	Yes
SE	Sveriges Ingenjörer	n.a.	n.a.	Yes
SE	Elektrikerna	Yes	Yes	Yes
SI	SDGD	Yes	No	Ad hoc
SI	SCGS	Yes	No	Regularly
SK	IOZ	Yes	No	Regularly

Notes: n.a. = not available. Unions in **bold** are affiliated to the EFBWW.

Source: NEC

2.4. Construction sector coverage, membership domain and organisational density of employer organisations and business associations

Table 27 indicates whether the sector-related employer organisations and business associations cover at least part of the three subsectors NACE 41, NACE 42 and NACE 43. Of the total of 93 organisations, 57 from all of the EU27 cover at least part of all three subsectors. By contrast, 35 organisations represent members that are active in only one or two subsectors.

2.4.1. Membership domain

All employer organisations and business associations with a membership domain congruent or overlapping relative to the construction sector cover the whole sector (all subactivities in all three subsectors); this holds true of 23 organisations from 15 countries. Around half of the organisations for which data are available have a membership domain (sectionally) overlapping relative to the sector, which means that these organisations organise not only (part of) the construction sector but also (part of) other sectors.

Table 27: Sector coverage of the construction sector employer organisations and business associations, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	Membership domain relative to construction	Organising sectors other than construction
EU27	93 EOs/BAs	63 EOs/BAs	64 EOs/BAs	89 EOs/BAs		47 EOs/BAs
	27 MSs	27 MSs	27 MSs	27 MSs		20 MSs
FIEC	33 EOs/BAs 35%	30 EOs/BAs 48%	31 EOs/BAs 48%	32 EOs/BAs 36%		13 EOs/BAs 28%
	24 MSs Not in LV, MT, PL	24 MSs	24 MSs	24 MSs		9 MSs
EBC	18 EOs/BAs 19%	17 EOs/BAs 27%	15 EOs/BAs 23%	18 EOs/BAs 20%		10 EOs/BAs 21%
	15 MSs	15 MSs	14 MSs	15 MSs		9 MSs
AT	BIB	Yes	Yes	Yes	S	No
AT	FVBI	Yes	Yes	Yes	S	No

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	Membership domain relative to construction	Organising sectors other than construction
AT	<i>BIBHG</i>	Yes	Yes	Yes	S	No
AT	BIDGS	Yes	No	Yes	SO	Yes
AT	BIHPFK	No	No	Yes	SO	Yes
AT	BIHB	Yes	Yes	Yes	S	No
AT	BIMT	No	No	Yes	SO	Yes
AT	BITHG	No	No	Yes	SO	Yes
AT	FEEI	No	No	Yes	SO	Yes
AT	Biegak	No	No	Yes	SO	Yes
AT	BIM	No	No	Yes	SO	Yes
AT	BISHL	No	No	Yes	SO	Yes
BE	FEMA	No	No	Yes	S	No
BE	<i>Bouwunie</i>	Yes	Yes	Yes	O	Yes
BE	Embuild ¹⁶	Yes	Yes	Yes	C	No
BG	BCC	Yes	Yes	Yes	S	No
CY	OSEOK	Yes	Yes	Yes	S	No
CZ	SPS	Yes	Yes	Yes	C	No
DE	Bauindustrie ¹⁷	Yes	Yes	Yes	S	No
DE	ZDB	No	Yes	Yes	S	No
DE	ZVDH	No	No	Yes	S	No
DE	BV Farbe	No	No	Yes	S	No
DE	ZVEH	No	No	Yes	SO	Yes
DE	DA	No	No	Yes	SO	Yes
DE	ZVSHK	No	No	Yes	S	No
DK	DI Byggeri	Yes	Yes	Yes	S	No
DK	Tekniq	Yes	Yes	Yes	SO	Yes
EE	EEEL	Yes	Yes	Yes	SO	Yes
EL	Pedmede	Yes	Yes	Yes	SO	Yes
EL	SATE	Yes	Yes	Yes	S	No
EL	POSEH	No	No	Yes	SO	Yes
ES	CNC	Yes	Yes	Yes	C	No
FI	Palta	No	No	Yes	SO	Yes
FI	STTA	No	No	Yes	S	No
FI	TAFFEMC	No	No	Yes	SO	Yes
FI	INFRA	No	Yes	No	SO	Yes
FI	RT	Yes	Yes	Yes	SO	Yes
FI	MTA	No	Yes	No	SO	Yes
FI	LVI TU	No	No	Yes	S	No
FI	GCF	Yes	No	Yes	SO	Yes
FR	FNTP	Yes	Yes	Yes	S	No
FR	FFB	Yes	Yes	Yes	C	No
FR	CNATP	No	Yes	No	S	No

¹⁶ Embuild used to be called Confédération Construction/Confederatie Bouw.

¹⁷ Bauindustrie used to be called HDB.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	Membership domain relative to construction	Organising sectors other than construction
FR	CAPEB	Yes	No	Yes	S	No
FR	SNSO	Yes	No	Yes	S	No
HR	HUP-UPG	Yes	Yes	Yes	O	Yes
HR	HOK	Yes	Yes	Yes	O	No
HU	ÉVOSZ	Yes	Yes	Yes	O	Yes
HU	IPOSZ	Yes	Yes	Yes	SO	Yes
IE	CIF	Yes	Yes	Yes	S	No
IE	NGMC	Yes	Yes	Yes	S	No
IT	ANCE	Yes	Yes	Yes	S	No
IT	Anaepa	Yes	Yes	Yes	S	No
IT	Legacoop Produzione e Servizi	Yes	Yes	Yes	SO	Yes
IT	Confcooperative Lavoro e Servizi	Yes	Yes	Yes	SO	Yes
IT	AGCI Produzione e Lavoro	Yes	Yes	Yes	n.a.	Yes
IT	CNA Costruzioni	Yes	Yes	Yes	C	No
IT	FIAE – Casartigiani	Yes	Yes	Yes	C	No
IT	CLAAI	Yes	Yes	Yes	SO	Yes
IT	ANIEM – Confapi	Yes	Yes	Yes	C	No
LT	LSA	Yes	Yes	Yes	O	Yes
LU	GEBTP	Yes	Yes	Yes	C	No
LU	FDA	Yes	Yes	Yes	O	Yes
LV	LBP ¹⁸	Yes	Yes	Yes	O	Yes
LV	LBA	Yes	Yes	Yes	SO	Yes
LV	LCBB	No	Yes	No	S	No
MT	MEA	Yes	Yes	Yes	SO	Yes
NL	Bouwend NL	Yes	Yes	Yes	C	No
NL	AfNL	Yes	Yes	Yes	S	No
NL	Techniek Nederland	No	No	Yes	SO	Yes
NL	OnderhoudNL	No	No	Yes	S	No
PL	PZPB	Yes	Yes	Yes	C	No
PL ¹⁹	ZRP	Yes	Yes	Yes	SO	Yes

¹⁸ LBP was a member of the FIEC until the end of 2021.

¹⁹ ZRP reported other employer organisations in the construction sector in Poland. Apart from the ZRP, there are five other employer organisations bringing together construction and construction materials manufacturers:

- Związek Pracodawców Producentów Materiałów dla Budownictwa (www.dlabudownictwa.pl)
- PZPB (<http://pzpb.com.pl/>)
- KBiN (www.kbin.org.pl)
- Konfederacja Lewiatan (www.lewiatan.org)
- Pracodawcy Rzeczypospolitej Polskiej (<http://pracodawcyrp.pl/>)

Member State (MS)	Employer organisation (EO)/Business association (BA)	At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	Membership domain relative to construction	Organising sectors other than construction
PL	KBiN	No	No	Yes	SO	Yes
PT	Fepicop	Yes	Yes	Yes	O	Yes
PT	Aecops	Yes	Yes	Yes	O	Yes
PT	AICCOPN	Yes	Yes	Yes	C	No
PT	AICE	Yes	Yes	Yes	S	No
RO	<i>UNPR</i>	Yes	Yes	Yes	SO	Yes
RO	<i>Zepher Cluster</i>	No	No	Yes	SO	Yes
RO	ARACO	Yes	Yes	Yes	SO	Yes
RO	FPSC	Yes	Yes	Yes	O	Yes
SE	Byggföretagen	Yes	Yes	Yes	S	No
SE	MiS	Yes	No	Yes	S	No
SE	P&V	No	No	Yes	S	No
SE	IN	No	Yes	Yes	S	No
SE	ME	No	Yes	Yes	S	No
SE	GBF	Yes	No	Yes	S	No
SI	GZS – CCBMIS	Yes	Yes	Yes	SO	Yes
SI	ZDS	Yes	Yes	Yes	O	Yes
SI	<i>OZS</i>	Yes	Yes	Yes	O	Yes
SK	ZSPS	Yes	Yes	Yes	S	No
SK	<i>SZZ</i>	Yes	Yes	Yes	SO	Yes

Notes: *n.a.* = not available; membership domain patterns relative to construction: C = congruence, O = overlap, S = sectionalism, SO = sectional overlap. Organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in italics are affiliated to the EBC.

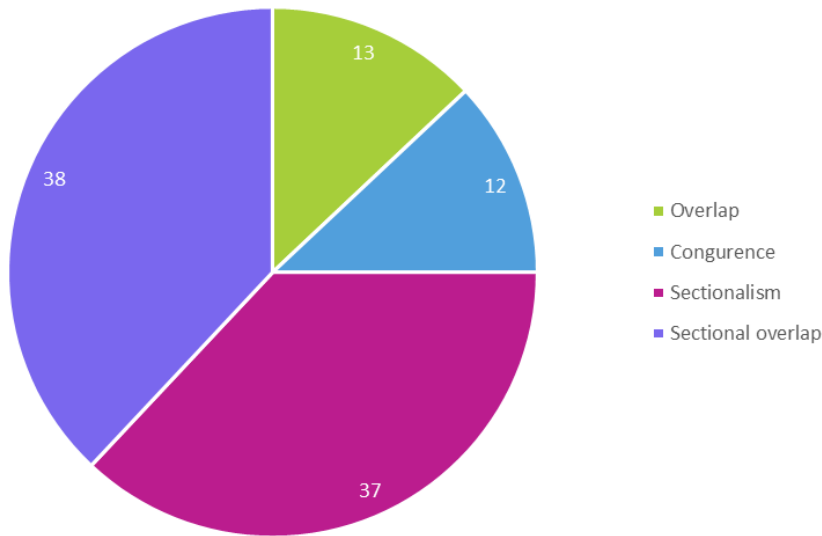
Source: NEC

Table 27 also shows that specialised construction activities (NACE 43) are covered by the membership domains of almost all employer organisations and business associations, while construction of building activities (NACE 41) and civil engineering activities (NACE 42) are less frequently covered. Although most organisations have a relatively broad membership domain relative to the construction sector, covering at least part of the activities of all three subsectors, their domains nevertheless tend to be narrower than those of the trade unions. This is because more than one-third of the organisations (37%) record a domain that is sectional relative to the sector, and an absolute majority of them (51%) do not represent businesses that are active in sectors other than construction (Figure 15). Most organisations thus exclusively focus on (part of) the construction sector, while on the trade union side more than 90% of the sector-related unions also organise workers who are active outside the construction sector.

Figure 15 shows the distribution of the membership domain patterns of the sector-related employer organisations and business associations relative to the construction sector.

Note that the last two organisations bring together bigger companies operating in various branches. There are also other organisations bringing together producers of construction materials that have not been mentioned, such as Stowarzyszenie Polski Gipsu, Stowarzyszenie Producentów Pap, Polska Unia Ceramiczna, Stowarzyszenie Producentów Cementu and Polskie Stowarzyszenie Producentów Styropianu.

Figure 15: Distribution of membership domain patterns of sector-related employer organisations/business associations in construction, 2021



Notes: Percentages are rounded. N = 91.

Source: NEC

Most cases of domain overlap (in the cases of organisations with domains either overlapping or sectionally overlapping relative to the sector) emanate from the coverage of (part of) the more broadly defined building and construction sector, including the manufacture of building materials (see LBA of Latvia) and metal engineering (see BIM of Austria) or recycling activities (see DA of Germany). Some of the employer organisations or business associations have a membership domain covering the whole ‘industry’ sector, including construction (see LSA of Lithuania). Other organisations cover the cooperative sector (for instance, Legacoop Produzione e Servizi and Confcooperative Lavoro e Servizi of Italy) or all kinds of artisan activities (see IPOSZ of Hungary, CLAAI of Italy and ZRP of Poland) and thus a segment of the economy that sectionally overlaps with the construction sector.

Sectionalism (37% of all cases) is caused by domain demarcations that focus on a particular subsector or segment of the construction sector, without covering areas of business activities outside the sector. Such segments may be defined by the size classes of construction companies, such as SMEs (see BIB of Austria and CAPEB and SNSO of France) or large companies (see FVBI of Austria), and by highly specialised activities within the construction sector, such as roofing (see ZVDH of Germany), sanitary and heating engineering activities (see ZVSHK of Germany) or civil engineering activities (see FNTP of France).

Finally, 14% of the associations have a membership domain that is largely congruent with the sector definition.

2.4.2. Membership domain by company size

Table 28 gives an overview of the membership domain coverage of the sector-related employer organisations and business associations, in terms of company size classes. A vast majority of organisations with information available represent companies of all size groups. LBP of Latvia does not represent microcompanies. GZS-CCBMIS and ZDS of Slovenia deliberately represent only larger companies in the sector, while microcompanies are organised by OZS. Anaepa and FIAE – Casartigiani of Italy are the representative organisations of the artisan segment of the sector and thus have only microcompanies as members. Companies employing at least 50 workers are slightly less frequently represented by the construction employer organisations and business associations. This is mainly because some organisations' membership domains focus on artisan activities only and thus they organise only very small companies (those in crafts and trades). This is the case for IPOSZ of Hungary; Anaepa, CLAAI and FIAE – Casartigiani of Italy; and ZRP of Poland. The Zepher Cluster of Romania is a not-for-profit organisation, rather than a business association, for small construction companies specialising in the construction of 'smart houses' and renovation works. Several of the EBC members (listed in italics in Table 28) do not cover larger companies, which is not surprising since the EBC represents only construction SMEs and craftspeople in Europe.

Table 28: Coverage in terms of company size classes of the construction sector employer organisations and business associations, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	1–9 employees	10–49 employees	50–249 employees	250 or more employees	Organisations covering all size classes
EU27	93 EOs/BAs	At least 81 EOs/BAs	At least 82 EOs/BAs	At least 75 EOs/BAs	At least 63 EOs/BAs	At least 59 EOs/BAs
	27 MSs	27 MSs	27 MSs	27 MSs	26 MSs	26 MSs
FIEC	33 EOs/BAs	31 EOs/BAs	33 EOs/BAs	33 EOs/BAs	31 EOs/BAs	29 EOs/BAs
	35%	38%	40%	44%	49%	49%
	24 MSs	23 MSs	24 MSs	24 MSs	23 MSs	
	Not in LV, MT, PL	Not in SI			Not in CY	
EBC	<i>18 EOs/BAs</i>	<i>18 EOs/BAs</i>	<i>17 EOs/BAs</i>	<i>14 EOs/BAs</i>	<i>10 EOs/BAs</i>	<i>10 EOs/BAs</i>
	<i>19%</i>	<i>22%</i>	<i>21%</i>	<i>19%</i>	<i>16%</i>	<i>17%</i>
	<i>15 MSs</i>	<i>15 MSs</i>	<i>15 MSs</i>	<i>13 MSs</i>	<i>10 MSs</i>	<i>10 MSs</i>
AT	BIB	Yes	Yes	Yes	Yes	Yes
AT	FVBI	Yes	Yes	Yes	Yes	Yes
AT	<i>BIBHG</i>	Yes	Yes	Yes	Yes	Yes
AT	BIDGS	Yes	Yes	Yes	Yes	Yes
AT	BIHPFK	Yes	Yes	Yes	Yes	Yes
AT	BIHB	Yes	Yes	Yes	Yes	Yes
AT	BIMT	Yes	Yes	Yes	Yes	Yes
AT	BITHG	Yes	Yes	Yes	Yes	Yes
AT	FEEI	Yes	Yes	Yes	Yes	Yes
AT	Biegak	Yes	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	1–9 employees	10–49 employees	50–249 employees	250 or more employees	Organisations covering all size classes
AT	BIM	Yes	Yes	Yes	Yes	Yes
AT	BISHL	Yes	Yes	Yes	Yes	Yes
BE	FEMA	Yes	Yes	n.a.	n.a.	n.a.
BE	<i>Bouwunie</i>	Yes	Yes	Yes	Yes	Yes
BE	Embuild	Yes	Yes	Yes	Yes	Yes
BG	BCC	Yes	Yes	Yes	Yes	Yes
CY	OSEOK	Yes	Yes	Yes	No	No
CZ	SPS	Yes	Yes	Yes	Yes	Yes
DE	Bauindustrie	n.a.	Yes	Yes	Yes	n.a.
DE	ZDB	Yes	Yes	Yes	n.a.	n.a.
DE	ZVDH	Yes	Yes	Yes	n.a.	n.a.
DE	BV Farbe	Yes	Yes	Yes	n.a.	n.a.
DE	ZVEH	Yes	Yes	Yes	No	No
DE	DA	Yes	Yes	Yes	No	No
DE	ZVSHK	Yes	Yes	Yes	n.a.	n.a.
DK	DI Byggeri	Yes	Yes	Yes	Yes	Yes
DK	Tekniq	Yes	Yes	Yes	Yes	Yes
EE	EEEL	Yes	Yes	Yes	Yes	Yes
EL	Pedmede	Yes	Yes	Yes	Yes	Yes
EL	SATE	Yes	Yes	Yes	Yes	Yes
EL	POSEH	Yes	Yes	No	No	No
ES	CNC	Yes	Yes	Yes	Yes	Yes
FI	Palta	n.a.	n.a.	n.a.	n.a.	n.a.
FI	STTA	n.a.	n.a.	n.a.	n.a.	n.a.
FI	TAFFEMC	Yes	Yes	n.a.	n.a.	n.a.
FI	INFRA	Yes	Yes	Yes	Yes	Yes
FI	RT	Yes	Yes	Yes	Yes	Yes
FI	MTA	n.a.	n.a.	n.a.	n.a.	n.a.
FI	LVI TU	Yes	Yes	Yes	Yes	Yes
FI	GCF	Yes	Yes	Yes	Yes	Yes
FR	FNTP	Yes	Yes	Yes	Yes	Yes
FR	FFB	Yes	Yes	Yes	Yes	Yes
FR	<i>CAPEB</i>	Yes	Yes	Yes	No	No
FR	<i>SNSO</i>	Yes	Yes	Yes	Yes	Yes
FR	CNATP					
HR	HUP-UPG	Yes	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	1–9 employees	10–49 employees	50–249 employees	250 or more employees	Organisations covering all size classes
HR	<i>HOK</i>	Yes	Yes	Yes	Yes	Yes
HU	ÉVOSZ	Yes	Yes	Yes	Yes	Yes
HU	<i>IPOSZ</i>	Yes	Yes	No	No	No
IE	CIF	Yes	Yes	Yes	Yes	Yes
IE	<i>NGMC</i>	Yes	Yes	Yes	No	No
IT	ANCE	Yes	Yes	Yes	Yes	Yes
IT	<i>Anaepa</i>	Yes	No	No	No	No
IT	Legacoop Produzione e Servizi	Yes	Yes	Yes	Yes	Yes
IT	Confcooperative Lavoro e Servizi	Yes	Yes	Yes	Yes	Yes
IT	AGCI Produzione e Lavoro	n.a.	n.a.	n.a.	n.a.	n.a.
IT	<i>CNA Costruzioni</i>	Yes	Yes	Yes	No	No
IT	FIAE – Casartigiani	Yes	No	No	No	No
IT	CLAAI	Yes	n.a.	n.a.	n.a.	n.a.
IT	ANIEM – Confapi	Yes	Yes	n.a.	n.a.	n.a.
LT	LSA	Yes	Yes	Yes	Yes	Yes
LU	GEBTP	Yes	Yes	Yes	Yes	Yes
LU	<i>FDA</i>	Yes	Yes	Yes	Yes	Yes
LV	<i>LBP</i>	No	Yes	Yes	Yes	No
LV	<i>LBA</i>	Yes	Yes	Yes	Yes	Yes
LV	LCBB	n.a.	n.a.	n.a.	n.a.	n.a.
MT	MEA	Yes	Yes	Yes	Yes	Yes
NL	Bouwend NL	Yes	Yes	Yes	Yes	Yes
NL	<i>AfNL</i>	Yes	Yes	Yes	Yes	Yes
NL	Techniek Nederland	Yes	Yes	Yes	Yes	Yes
NL	OnderhoudNL	n.a.	n.a.	n.a.	n.a.	n.a.
PL	PZPB	Yes	Yes	Yes	Yes	Yes
PL	<i>ZRP</i>	Yes	Yes	Yes	No	No
PL	KBiN	n.a.	n.a.	n.a.	n.a.	n.a.
PT	Fepicop ²⁰	Yes	Yes	Yes	Yes	Yes
PT	Aecops	Yes	Yes	Yes	Yes	Yes
PT	AICCOPN	Yes	Yes	Yes	Yes	Yes

²⁰ Fepicop is an umbrella organisation of Aecops and AICCOPN.

Member State (MS)	Employer organisation (EO)/Business association (BA)	1–9 employees	10–49 employees	50–249 employees	250 or more employees	Organisations covering all size classes
PT	AICE	Yes	Yes	Yes	No	No
RO	<i>UNPR</i>	Yes	Yes	Yes	Yes	Yes
RO	<i>Zepher Cluster</i>	Yes	Yes	No	No	No
RO	ARACO	Yes	Yes	Yes	Yes	Yes
RO	FPSC	Yes	Yes	Yes	Yes	Yes
SE	Byggföretagen	Yes	Yes	Yes	Yes	Yes
SE	MiS	Yes	Yes	Yes	Yes	Yes
SE	P&V	Yes	Yes	Yes	Yes	Yes
SE	IN	Yes	Yes	Yes	Yes	Yes
SE	ME	Yes	Yes	Yes	Yes	Yes
SE	GBF	Yes	Yes	Yes	Yes	Yes
SI	GZS – CCBMIS	No	Yes	Yes	Yes	No
SI	ZDS	No	Yes	Yes	Yes	No
SI	<i>OZS</i>	Yes	Yes	Yes	Yes	Yes
SK	ZSPS	Yes	Yes	Yes	Yes	Yes
SK	<i>SZZ</i>	Yes	Yes	No	No	No

Notes: *n.a.* = not available. Organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in italics are affiliated to the EBC.

Source: NEC

2.4.3. Membership fees by company size

Table 29 looks at the significance of company size class in contributing membership fees to the sector's employer organisations and business associations. In particular, the table identifies for each individual organisation those company size classes contributing the largest proportion of membership fees. More than one-third of organisations were unable or unwilling to provide the information requested. With regard to the remaining organisations, Table 29 shows that overall microenterprises and SMEs tend to pay a proportionally higher amount of membership fees than large companies with workforces of 250 or more employees. Only 13 organisations from 11 countries (Czechia, Finland, France, Germany, Hungary, Ireland, Latvia, Poland, Slovakia, Slovenia and Sweden) could be identified that obtain the largest proportion of their membership fees from large companies, while at least 23 and 24 organisations obtain the relatively largest share of membership fees from SMEs and microcompanies, respectively. A few employer organisations and business associations could not identify a single company size class as the main contributor of membership fees and thus gave multiple answers (in that they identified two size classes).

Table 29: Company size classes contributing the largest proportion of membership fees to the construction sector employer organisations and business associations, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	250+ employees	10–249 employees	0–9 employees
EU27	93 EOs/BAs in 27 MSs	At least 13 EOs/BAs	At least 23 EOs/BAs	At least 24 EOs/BAs
FIEC	33 EOs/BAs in 24 MSs	10 EOs/BAs	9 EOs/BAs	3 EOs/BAs
<i>EBC</i>	<i>18 EOs/BAs in 15 MSs</i>	<i>0 EOs/BAs</i>	<i>5 EOs/BAs</i>	<i>11 EOs/BAs</i>
AT	BIB	n.a.	n.a.	n.a.
AT	FVBI	n.a.	n.a.	n.a.
AT	<i>BIBHG</i>	n.a.	n.a.	n.a.
AT	BIDGS	n.a.	n.a.	n.a.
AT	BIHPFK	n.a.	n.a.	n.a.
AT	BIHB	n.a.	n.a.	n.a.
AT	BIMT	n.a.	n.a.	n.a.
AT	BITHG	n.a.	n.a.	n.a.
AT	FEEI	n.a.	n.a.	n.a.
AT	Biegak	n.a.	n.a.	n.a.
AT	BIM	n.a.	n.a.	n.a.
AT	BISHL	n.a.	n.a.	n.a.
BE	FEMA	No	Yes	Yes
BE	<i>Bouwunie</i>	n.a.	n.a.	Yes
BE	Embuild	n.a.	n.a.	n.a.
BG	BCC	No	Yes	No
CY	OSEOK	No	Yes	No
CZ	SPS	Yes	Yes	No
DE	Bauindustrie	Yes	No	No
DE	ZDB	No	No	Yes
DE	ZVDH	No	No	Yes
DE	BV Farbe	n.a.	n.a.	n.a.
DE	ZVEH	No	Yes	Yes
DE	DA	No	Yes	No
DE	ZVSHK	n.a.	n.a.	n.a.
DK	DI Byggeri	No	Yes	No
DK	Tekniq	n.a.	n.a.	n.a.
EE	EEEL	n.a.	n.a.	n.a.
EL	Pedmede	No	No	Yes
EL	SATE	No	No	Yes
EL	POSEH	No	No	Yes
ES	CNC	n.a.	n.a.	n.a.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	250+ employees	10–249 employees	0–9 employees
FI	Palta	n.a.	n.a.	n.a.
FI	STTA	n.a.	n.a.	n.a.
FI	TAFFEMC	No	No	Yes
FI	INFRA	n.a.	n.a.	n.a.
FI	RT	n.a.	n.a.	n.a.
FI	MTA	No	No	Yes
FI	LVI TU	Yes	No	No
FI	GCF	Yes	No	No
FR	FNTP	Yes	No	No
FR	FFB	No	Yes	No
FR	<i>CAPEB</i>	No	No	Yes
FR	<i>SNSO</i>	No	Yes	No
FR	CNATP			
HR	HUP-UPG	No	Yes	No
HR	<i>HOK</i>	No	No	Yes
HU	ÉVOSZ	Yes	No	No
HU	<i>IPOSZ</i>	No	No	Yes
IE	CIF	Yes	No	No
IE	<i>NGMC</i>	No	No	Yes
IT	ANCE	No	No	Yes
IT	<i>Anaepa</i>	No	No	Yes
IT	Legacoop Produzione e Servizi	n.a.	n.a.	n.a.
IT	Confcooperative Lavoro e Servizi	n.a.	n.a.	n.a.
IT	AGCI Produzione e Lavoro	n.a.	n.a.	n.a.
IT	<i>CNA Costruzioni</i>	No	No	Yes
IT	FIAE – Casartigiani	No	No	Yes
IT	CLAAI	No	No	Yes
IT	ANIEM – Confapi	No	No	Yes
LT	LSA	n.a.	n.a.	n.a.
LU	GEBTP	n.a.	n.a.	n.a.
LU	<i>FDA</i>	n.a.	n.a.	n.a.
LV	LBP	No	Yes	No
LV	<i>LBA</i>	No	Yes	No
LV	LCBB	Yes	Yes	No
MT	MEA	No	Yes	No
NL	Bouwend NL	No	Yes	No
NL	<i>AfNL</i>	No	No	Yes

Member State (MS)	Employer organisation (EO)/Business association (BA)	250+ employees	10–249 employees	0–9 employees
NL	Techniek Nederland	n.a.	n.a.	n.a.
NL	OnderhoudNL	n.a.	n.a.	n.a.
PL	PZPB	Yes	No	No
PL	<i>ZRP</i>	No	No	Yes
PL	KBiN	n.a.	n.a.	n.a.
PT	Fepicop ²¹	n/a	n/a	n/a
PT	Aecops	n.a.	n.a.	n.a.
PT	AICCOPN	No	Yes	No
PT	AICE	No	Yes	No
RO	<i>UNPR</i>	No	Yes	No
RO	<i>Zepher Cluster</i>	No	Yes	Yes
RO	ARACO	No	Yes	No
RO	FPSC	n.a.	n.a.	n.a.
SE	Byggföretagen	Yes	No	No
SE	MiS	No	Yes	No
SE	P&V	No	Yes	No
SE	IN	n.a.	n.a.	n.a.
SE	ME	n.a.	n.a.	n.a.
SE	GBF	n.a.	n.a.	n.a.
SI	GZS – CCBMIS	Yes	No	No
SI	ZDS	Yes	No	No
SI	<i>OZS</i>	No	Yes	No
SK	ZSPS	Yes	No	No
SK	<i>SZZ</i>	No	No	Yes

Notes: n.a. = not available; n/a = not applicable. Multiple answers were possible. Organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in italics are affiliated to the EBC.

Source: NEC

2.4.4. Membership structure of employer organisations and business associations

The membership structure of employer organisations and business associations can have three forms. An organisation may have individual companies as direct members, it may have regional subunits as members that in turn have individual companies from these regions as members and it may have subsectoral organisations/units as members (that organise a specific type of activity in the construction sector) that in turn have individual companies from those specific activities as affiliates. Moreover, these membership structure patterns are not necessarily mutually exclusive, which means that two or even all three of them may apply to one organisation. Table 30 shows that 68 of

²¹ Fepicop is an umbrella organisation of Aecops and AICCOPN.

the 93 employer organisations and business associations from 25 Member States (all of the EU27 except Cyprus and Spain) rely on membership based on direct individual company members, while 40 organisations from 16 Member States have established a multi-layer structure in geographical terms in that they have regional subunits that in turn directly organise individual companies from these regions as members. In addition, 22 organisations from 16 Member States have established a differentiated structure in terms of business activities, which means that these organisations have subsectoral organisations as members that in turn affiliate individual companies from specific business activities as members. For several employer organisations in Austria, for instance, individual companies are at the same time directly affiliated to the organisation and affiliated to a regional subunit of the organisation, reflecting the geographical differentiation of the Austrian WKO system. Some organisations in Germany, Hungary, Italy and Spain record a membership structure based on differentiation in terms of both geographical coverage and business activity. And several organisations from Belgium, Bulgaria, France, Romania, Slovakia and Sweden combine this 'double' differentiation (implying indirect affiliation through lower-order units) with direct membership of individual companies, meaning that direct and indirect membership co-exist in one organisation.

Table 30: Membership structure of construction sector employer organisations and business associations, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	Direct individual company members	Regional suborganisations as members	Subsectoral (specific types of activity) member organisations
EU27	93 EOs/BAs	68 EOs/BAs	40 EOs/BAs	22 EOs/BAs
	27 MSs	25 MSs	16 MSs	16 MSs
FIEC	33 EOs/BAs	25 EOs/BAs	12 EOs/BAs	14 EOs/BAs
	24 MSs	20 MSs	10 MSs	12 MSs
EBC	<i>18 EOs/BAs</i>	<i>11 EOs/BAs</i>	<i>11 EOs/BAs</i>	<i>6 EOs/BAs</i>
	<i>15 MSs</i>	<i>10 MSs</i>	<i>10 MSs</i>	<i>6 MSs</i>
AT	BIB	Yes	Yes	No
AT	FVBI	Yes	No	No
AT	<i>BIBHG</i>	Yes	Yes	No
AT	BIDGS	Yes	Yes	No
AT	BIHPFK	Yes	Yes	No
AT	BIHB	Yes	Yes	No
AT	BIMT	Yes	Yes	No
AT	BITHG	Yes	Yes	No
AT	FEEI	Yes	No	No
AT	Biegak	Yes	Yes	No
AT	BIM	Yes	Yes	No
AT	BISHL	Yes	Yes	No
BE	FEMA	Yes	No	No
BE	<i>Bouwnie</i>	Yes	Yes	Yes
BE	Embuild	Yes	No	Yes
BG	BCC	Yes	Yes	Yes
CY	OSEOK	No	Yes	No
CZ	SPS	Yes	No	Yes
DE	Bauindustrie	No	Yes	No

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	Direct individual company members	Regional suborganisations as members	Subsectoral (specific types of activity) member organisations
DE	ZDB	No	Yes	Yes
DE	ZVDH	No	Yes	No
DE	BV Farbe	No	Yes	No
DE	ZVEH	No	Yes	No
DE	DA	Yes	Yes	No
DE	ZVSHK	No	Yes	No
DK	DI Byggeri	Yes	No	No
DK	Tekniq	Yes	No	No
EE	EEEL	Yes	No	No
EL	Pedmede	Yes	Yes	No
EL	SATE	Yes	Yes	No
EL	POSEH	No	No	No
ES	CNC	No	Yes	Yes
FI	Palta	Yes	No	No
FI	STTA	Yes	No	No
FI	TAFFEMC	Yes	No	No
FI	INFRA	Yes	No	No
FI	RT	No	No	Yes
FI	MTA	No	No	Yes
FI	LVI TU	Yes	No	No
FI	GCF	Yes	No	No
FR	FNTP	Yes	Yes	Yes
FR	FFB	Yes	Yes	Yes
FR	<i>CAPEB</i>	No	Yes	No
FR	CNATP			
FR	<i>SNSO</i>	Yes	No	No
HR	HUP-UPG	Yes	No	No
HR	<i>HOK</i>	Yes	Yes	No
HU	ÉVOSZ	Yes	No	Yes
HU	<i>IPOSZ</i>	No	Yes	Yes
IE	CIF	Yes	No	Yes
IE	<i>NGMC</i>	Yes	No	No
IT	ANCE	No	Yes	Yes
IT	<i>Anaepa</i>	No	Yes	No
IT	Legacoop Produzione e Servizi	Yes	No	No
IT	Confcooperative Lavoro e Servizi	Yes	No	No
IT	AGCI Produzione e Lavoro	Yes	No	No
IT	<i>CNA Costruzioni</i>	No	Yes	No
IT	FIAE – Casartigiani	No	Yes	No
IT	CLAAI	Yes	No	No
IT	ANIEM – Confapi	No	Yes	No
LT	LSA	Yes	No	Yes

Member State (MS)	Employer organisation (EO)/Business association (BA)	Direct individual company members	Regional suborganisations as members	Subsectoral (specific types of activity) member organisations
LU	GEBTP	Yes	No	No
LU	<i>FDA</i>	Yes	No	No
LV	LBP	Yes	No	No
LV	<i>LBA</i>	Yes	No	No
LV	LCBB	Yes	No	No
MT	MEA	Yes	No	No
NL	Bouwend NL	Yes	No	No
NL	<i>AfNL</i>	No	No	Yes
NL	Techniek Nederland	Yes	No	No
NL	OnderhoudNL	Yes	No	No
PL	PZPB	Yes	No	Yes
PL	<i>ZRP</i>	No	Yes	No
PL	KBIN	No	No	Yes
PT	Fepicop²²	No	Yes	No
PT	Aecops	Yes	No	No
PT	AICCOPN	Yes	No	No
PT	AICE	Yes	No	No
RO	<i>UNPR</i>	Yes	Yes	Yes
RO	<i>Zepher Cluster</i>	Yes	No	No
RO	ARACO	Yes	Yes	Yes
RO	FPSC	No	No	Yes
SE	Byggföretagen	Yes	No	No
SE	MiS	No	Yes	No
SE	P&V	Yes	Yes	Yes
SE	IN	Yes	No	No
SE	ME	Yes	No	No
SE	GBF	Yes	No	No
SI	GZS – CCBMIS	Yes	No	No
SI	ZDS	Yes	No	No
SI	<i>OZS</i>	Yes	No	No
SK	ZSPS	Yes	No	No
SK	<i>SZZ</i>	Yes	Yes	Yes

Notes: BA = business association; EO = employer organisation; MS = Member State. Multiple answers were possible. Organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in italics are affiliated to the EBC.

Source: NEC

2.4.5. Membership strength

Table 31 shows the employer organisations' and business associations' absolute numbers of total member companies in construction and the number of companies disaggregated by company size class. As is the case on the trade union side, membership in terms of absolute numbers differs

²² Fepicop is an umbrella organisation of Aecops and AICCOPN.

greatly between organisations, ranging from only a few dozen members in some organisations to more than 86,000 in the case of ANCE in Italy. However, this notable variation mainly reflects differences in the size of the economy and only partially reflects the organisations' ability to attract members; in Austria, all 12 employer organisations listed in Table 31 form part of the WKO system, membership of which is mandatory, meaning that all companies in the sector are members of one or more employer organisations under the umbrella of the WKO. Hence, the number of member companies listed for each individual organisation in Table 31 does not provide a very meaningful indication of the organisation's strength, especially because this table does not give precise information on the strength in terms of employees represented by member companies. This is particularly the case for microfirms, for which the available data does not allow self-employed without employee to be distinguished from companies with 1 to 9 employees.

Tentative information on the latter aspect is provided by the numbers of member companies disaggregated by company size category. However, these data are available for only 45 of the 93 organisations.

Table 31: Employer organisations' and business associations' membership strength in total and disaggregated by company size classes in construction, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	Number of member companies	Among companies with 250+ employees	Among companies with 50–249 employees	Among companies with 10–49 employees	Among companies with up to 9 employees
EU27	Number of companies organised by all 93 EOs/BAs	581,683	1,241	8,177	62,475	394,539
FIEC	Companies affiliated to the 33 FIEC members	228,048	1,055	6,764	39,152	151,640
FIEC	% of all organised companies	39.2	85.0	82.7	62.7	38.4
<i>EBC</i>	<i>Companies affiliated to the 18 EBC members</i>	<i>247,594</i>	<i>66</i>	<i>735</i>	<i>20,305</i>	<i>224,138</i>
<i>EBC</i>	<i>% of all organised companies</i>	<i>42.6</i>	<i>5.3</i>	<i>9.0</i>	<i>32.5</i>	<i>56.8</i>
EU27	Number of companies in the sector	3,536,996	1,886	18,203	198,379	3,318,528
EU27	% of organised companies	16.4	65.8	44.9	31.5	11.9
FIEC	% affiliated to FIEC members	6.4	55.9	37.2	19.7	4.6
<i>EBC</i>	<i>% affiliated to EBC members</i>	<i>7.0</i>	<i>3.5</i>	<i>4.0</i>	<i>10.2</i>	<i>6.8</i>
AT	BIB	11,525	32	235	1,084	10,174
AT	FVBI	54	16	14	5	19

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	Number of member companies	Among companies with 250+ employees	Among companies with 50–249 employees	Among companies with 10–49 employees	Among companies with up to 9 employees
AT	<i>BIBHG</i>	7,902	6	80	536	7,280
AT	BIDGS	2,585	1	31	364	2,189
AT	BIHPFK	1,830	1	3	136	1,690
AT	BIHB	1,633	2	9	261	1,361
AT	BIMT	5,136	3	22	429	4,682
AT	BITHG	1,500	n.a.	n.a.	n.a.	n.a.
AT	FEEI	n.a.	n.a.	n.a.	n.a.	n.a.
AT	Biegak	n.a.	n.a.	n.a.	n.a.	n.a.
AT	BIM	n.a.	n.a.	n.a.	n.a.	n.a.
AT	BISHL	n.a.	n.a.	n.a.	n.a.	n.a.
BE	FEMA	275	n.a.	n.a.	n.a.	n.a.
BE	<i>Bouwunie</i>	7,464	2	32	527	6,903
BE	Embuild ²³	13,851	61	339	1,921	11,530
BG	BCC	6,207	71	755	2,367	3,014
CY	OSEOK	900	0	11	439	450
CZ	SPS	841	76	261	303	201
DE	Bauindustrie	n.a.	n.a.	n.a.	n.a.	n.a.
DE	ZDB	35,000	n.a.	n.a.	n.a.	n.a.
DE	ZVDH	6,759	n.a.	n.a.	n.a.	n.a.
DE	BV Farbe	n.a.	n.a.	n.a.	n.a.	n.a.
DE	ZVEH	15,000	n.a.	n.a.	n.a.	n.a.
DE	DA	700	60	330	250	60
DE	ZVSHK	48,000	n.a.	n.a.	n.a.	n.a.
DK	DI Byggeri	4,658	16	196	1,110	3,336
DK	Tekniq	3,072	18	127	836	2,091
EE	EEEL	90	5	25	38	22
EL	Pedmede	2,455	5	50	400	2,000
EL	SATE	725	n.a.	n.a.	n.a.	n.a.
EL	POSEH	n.a.	0	0	n.a.	n.a.
ES	CNC	n.a.	n.a.	n.a.	n.a.	n.a.
FI	Palta	150	n.a.	n.a.	n.a.	n.a.
FI	STTA	170	n.a.	n.a.	n.a.	n.a.
FI	TAFFEMC	1,000	n.a.	n.a.	n.a.	n.a.
FI	INFRA	1,000	n.a.	n.a.	n.a.	n.a.
FI	RT	2,913	35	493	1,567	818
FI	MTA	120	1	n.a.	n.a.	n.a.
FI	LVI TU	322	3	24	167	128
FI	GCF	540	20	110	280	130
FR	FNTP	8,310	183	530	2,050	5,547
FR	FFB	44,218	150	1,200	11,789	31,079
FR	CNATP					

²³ The data provided by Embuild refer to 2023.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	Number of member companies	Among companies with 250+ employees	Among companies with 50–249 employees	Among companies with 10–49 employees	Among companies with up to 9 employees
FR	<i>CAPEB</i>	57,126	0	71	3,013	54,042
FR	<i>SNSO</i>	3,000	0	n.a.	n.a.	n.a.
HR	HUP-UPG	40	5	25	6	4
HR	<i>HOK</i>	2,000	5	10	250	1,735
HU	ÉVOSZ	250	21	87	79	63
HU	<i>IPOSZ</i>	2,025	0	0	n.a.	2,000
IE	CIF	1,500	30	470	500	500
IE	<i>NGMC</i>	4,617	0	76	249	4,292
IT	ANCE	86,362	118	838	8,893	76,519
IT	<i>Anaepa</i>	50,000	0	0	2,500	47,500
IT	Legacoop Produzione e Servizi	385	n.a.	n.a.	n.a.	n.a.
IT	Confcooperativ e Lavoro e Servizi	n.a.	n.a.	n.a.	n.a.	n.a.
IT	AGCI Produzione e Lavoro	n.a.	n.a.	n.a.	n.a.	n.a.
IT	<i>CNA Costruzioni</i>	49,500	0	47	2,700	46,753
IT	FIAE – Casartigiani	n.a.	n.a.	n.a.	n.a.	n.a.
IT	CLAAI	n.a.	n.a.	n.a.	n.a.	n.a.
IT	ANIEM – Confapi	n.a.	n.a.	n.a.	n.a.	n.a.
LT	LSA	100	n.a.	n.a.	n.a.	n.a.
LU	GEBTP	n.a.	n.a.	n.a.	n.a.	n.a.
LU	<i>FDA</i>	1,844	40	238	734	832
LV	LBP	20	n.a.	n.a.	n.a.	n.a.
LV	<i>LBA</i>	35	n.a.	n.a.	n.a.	n.a.
LV	LCBB	15	n.a.	n.a.	n.a.	n.a.
MT	MEA	70	n.a.	n.a.	n.a.	n.a.
NL	Bouwend NL	4,362	51	302	1,232	2,777
NL	<i>AfNL</i>	1,046	1	34	192	819
NL	Techniek Nederland	5,000	n.a.	n.a.	n.a.	n.a.
NL	OnderhoudNL	1,700	n.a.	n.a.	n.a.	n.a.
PL	PZPB	112	30	48	23	11
PL	<i>ZRP</i>	58,990	0	82	9,220	49,688
PL	KBiN	1,000	n.a.	n.a.	n.a.	n.a.
PT	Fepicop ²⁴	n.a.	n.a.	n.a.	n.a.	n.a.
PT	Aecops	1,012	n.a.	n.a.	n.a.	n.a.
PT	AICCOPN	4,136	25	n.a.	n.a.	2,843

²⁴ Fepicop is an umbrella organisation of Aecops and AICCOPN.

Member State (MS)	Employer organisation (EO)/Business association (BA)	Number of member companies	Among companies with 250+ employees	Among companies with 50–249 employees	Among companies with 10–49 employees	Among companies with up to 9 employees
PT	AICE	80	n.a.	n.a.	n.a.	n.a.
RO	<i>UNPR</i>	22	3	7	6	6
RO	<i>Zepher Cluster</i>	2	0	0	1	1
RO	ARACO	236	30	75	75	56
RO	FPSC	678	62	161	226	229
SE	Byggföretagen	3,840	33	341	1,662	1,804
SE	MiS	1,039	2	38	219	780
SE	P&V	922	2	70	500	350
SE	IN	3,600	n.a.	n.a.	n.a.	n.a.
SE	ME	3,500	n.a.	n.a.	n.a.	n.a.
SE	GBF	343	n.a.	n.a.	n.a.	n.a.
SI	GZS – CCBMIS	250	n.a.	n.a.	n.a.	n.a.
SI	ZDS	n.a.	n.a.	n.a.	n.a.	n.a.
SI	<i>OZS</i>	2,706	9	58	352	2,287
SK	ZSPS	82	7	22	30	23
SK	<i>SZZ</i>	300*	0	0	n.a.	n.a.

* Self-employed people rather than companies.

Notes: *n.a.* = not available. Organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in italics are affiliated to the EBC. Given that, for organisations not affiliated to the FIEC or the EBC, detailed data on their membership in the different size groups were often not provided, only the total numbers are given. Consequently, the totals for the different company size groups all together are less than the total values for all organisations. In addition, the percentages for the different size groups must be understood in the context that, for many organisations not affiliated to the FIEC or the EBC, the breakdown by size group was not provided.

Source: NEC

2.4.6. Sectoral densities of employer organisations and business associations

The organisational density of employer organisations can be measured in two ways. The first consists of the number of affiliated companies, while the second estimates the collective workforce of all affiliated companies. For organisations mainly focusing on companies with a larger workforce, the second way (assessing the estimated workforce of the affiliated companies) is more advantageous than the number of affiliated companies as a proportion of all companies in the sector, which is normally more advantageous for organisations focusing on SMEs and microfirms. In Table 31, the numbers of companies are given, which is the first way of assessing the density of employer organisations. The second way, using the estimated workforce, is included in Table 32. To make accurate calculations, data for all organisations need to be available, but this is not always the case. Calculations in both tables are made on the basis of the data available.

Of all 3,536,996 companies in the sector, there are 581,683 affiliated to a sectoral employer organisation, which is 16.4% of all sectoral companies. A total of 228,048 companies are affiliated to FIEC member organisations, which is 39.2% of all organised companies and 6.4% of all sectoral

companies. For the EBC, there are 247,594 companies affiliated to its member organisations, which is 42.6% of all organised companies and 7.0% of all sectoral companies.

The organisation rate varies in the different company size groups. Of companies with 250 employees or more, 65.8% are organised, while for those with 50–249 employees the rate is 44.9%, for companies with between 10 and 49 employees it is 31.5% and for microfirms with fewer than 10 employees it is 11.9%.

In the group of companies with 250 employees or more, FIEC members organise 85% of all organised companies and 55.9% of all companies in that size group. The EBC organises 5.3% of all organised companies and 3.5% of all companies with 250 employees or more. In the group of companies with 50–249 employees, the FIEC organises 82.7% of all organised companies and 37.2% of all companies in that size group. The EBC organises 9.0% of all organised companies and 4.0% of all companies with between 50 and 249 employees. In the 10–49 size group, the FIEC organises 62.7% of all organised companies and 19.7% of all companies. The EBC organises 32.5% of all organised companies and 10.2% of all companies with between 10 and 49 employees. In the group of microfirms, with fewer than 10 employees, the FIEC represents 38.4% of all organised microfirms and 4.6% of all microfirms. Microfirms represent 66.5% of FIEC membership in terms of companies affiliated to the national member organisations. The EBC organises 56.8% of all organised microfirms and 6.8% of all microfirms in the sector. Microfirms represent 90.5% of EBC membership in terms of companies affiliated to its national member organisations. 88% of the EBC-organised microfirms are concentrated in three Member States (Italy, France and Poland).

The category of microfirms includes self-employed people without employees. The available data do not allow for a distinction between companies with employees and self-employed people without employees.

The second method of calculating the organisational density in the sector is as the ratio of the number of employees employed by member companies to the total number of employees in the construction sector. Table 32 shows that 20 (33%) of the 60 organisations with data available have a sectoral density in terms of employees of 20% or more (13 of them are affiliated to the FIEC). For 14 organisations it is between 10 and 20%. While sectoral density is 10% or less in the cases of 29 organisations (48% of the organisations that document figures on density). As on the trade union side, in fragmented associational systems the sectoral density of each individual organisation tends to decrease as the number of co-existing organisations increases. However, the calculation of cumulative densities among employer organisations and business associations per country would be troublesome for two reasons: first, sectoral density data are lacking for around one-third of organisations; second, in several countries there is the possibility of multiple memberships, in that a company may be a member of more than one organisation, which would lead to multiple counting of companies and thus their employees. Multiple counting results in the artificial enhancement of cumulative densities. Both a lack of data and the issue of multiple counting tend to substantially thwart attempts to compare densities between countries.

Table 32 also displays information on the membership trends of employer organisations and business associations in the construction sector from about 2018 to 2021. A relative majority of organisations (27) for which information is available register a stable membership trend over those years, 21 organisations experienced increased membership, and 12 organisations faced membership

losses. However, for 33 organisations no information on the membership trend was provided, making it difficult to detect an EU-wide trend.

Last, but not least, Table 32 gives information on the relative importance of the employer organisations and business associations in the construction sector of a country, whereby the table differentiates between the significance of an organisation among large companies on the one hand and SMEs on the other hand. The organisations with the largest membership strength among large companies in a country are in green, while those that have the largest membership strength among SMEs are in yellow. In 24 Member States, the most important organisations among large companies are affiliated to the FIEC; in 17 Member States, the employer organisations organising most SMEs are also affiliated to the FIEC. This underscores the role of the FIEC as the most representative organisation in the sector at European level for both large companies and SMEs.

The EBC represents the most important organisations organising SMEs and microfirms in 10 Member States. In Spain, the CNC, which has the largest membership strength among larger companies and also among SMEs, is affiliated to both the EBC and the FIEC. The CNC's membership strength thus counts for the representativeness of the FIEC and also that of the EBC.

Table 32: Employer organisations' and business associations' organisational density in terms of workers employed by member companies in the construction sector, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	Membership trend over three years covered (2018–2021)	Sectoral density in terms of employees (%)	Relative importance among large companies	Relative importance among SMEs
FIEC				24 MSs Not in LV, MT, PL	17 MSs
EBC				2 MSs In ES, ²⁵ LV	10 MSs In BE, ES, ²⁵ FR, HU, IE, LU, LV, PL, SI, SK
AT	BIB	Increased	33	1	1
AT	FVBI	Decreased	11	2	2 (or 3)
AT	<i>BIBHG</i>	Decreased	13	3	2 (or 3)
AT	BIDGS	n.a.	<6	3	3
AT	BIHPFK	Increased	2	3	3
AT	BIHB	n.a.	4	3	3
AT	BIMT	n.a.	<7	3	3
AT	BITHG	n.a.	2–3	3	3
AT	FEEI	n.a.	n.a.	3	3
AT	Biegak	n.a.	1–2	3	3
AT	BIM	n.a.	n.a.	3	3
AT	BISHL	n.a.	5–7	3	3
BE	FEMA	n.a.	n.a.	n.a.	3
BE	<i>Bouwunie</i>	Stable	n.a.	2	1

²⁵ The CNC in Spain is affiliated to both the FIEC and the EBC; it counts for the representativeness of both the FIEC and the EBC.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	Membership trend over three years covered (2018–2021)	Sectoral density in terms of employees (%)	Relative importance among large companies	Relative importance among SMEs
BE	Embuild	n.a.	n.a.	1	2 ²⁶
BG	BCC	Increased	75	1	1
CY	OSEOK	Decreased	40	1	1
CZ	SPS	Stable	28	1	1
DE	Bauindustrie	Stable	n.a.	1 (or 2)	2 (or 1)
DE	ZDB	Decreased	14	2 (or 1)	1 (or 2)
DE	ZVDH	Decreased	4	3	3
DE	BV Farbe	n.a.	n.a.	3	3
DE	ZVEH	Decreased	n.a.	3	3
DE	DA	Increased	<1	3	3
DE	ZVSHK	n.a.	14	3	3
DK	DI Byggeri	Increased	67	1	1
DK	Tekniq	Increased	20	2	2
EE	EEEL	Stable	11	1	1
EL	Pedmede	Stable	n.a.	1	1
EL	SATE	n.a.	n.a.	n.a.	n.a.
EL	POSEH	Stable	n.a.	n.a.	n.a.
ES	CNC	Stable	n.a.	1	1
FI	Palta	n.a.	3	3	3
FI	STTA	n.a.	1–2	3	3
FI	TAFFEMC	Increased	<1	3	3
FI	INFRA	n.a.	<10	3	3
FI	RT	Increased	35	1	1
FI	MTA	n.a.	<1	3	3
FI	LVI TU	Increased	4	3	3
FI	GCF	Increased	15	2	2
FR	FNTP	Increased	25–30	2	3
FR	FFB	Stable	53	1	2
FR	<i>CAPEB</i>	Increased	20	3	1
FR	<i>SNSO</i>	Decreased	n.a.	3	3
FR	CNATP				
HR	HUP-UPG	Stable	20	1	1
HR	<i>HOK</i>	Stable	15	2	2
HU	ÉVOSZ	Increased	10	1	2
HU	<i>IPOSZ</i>	Decreased	4–5	2	1
IE	CIF	Stable	40	1	2
IE	<i>NGMC</i>	Decreased	20	2	1
IT	ANCE	Stable	n.a.	1	1
IT	<i>Anaepa</i>	Decreased	n.a.	2	2

²⁶ Embuild acknowledges that if self-employed workers (without employees) are included among the microfirms and SMEs then it is the second largest; if, however, only the SMEs with employees are considered, it is the largest.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	Membership trend over three years covered (2018–2021)	Sectoral density in terms of employees (%)	Relative importance among large companies	Relative importance among SMEs
IT	Legacoop Produzione e Servizi	n.a.	2	3	3
IT	Confcooperative Lavoro e Servizi	n.a.	n.a.	3	3
IT	AGCI Produzione e Lavoro	n.a.	n.a.	3	3
IT	<i>CNA Costruzioni</i>	n.a.	n.a.	3	3
IT	FIAE – Casartigiani	n.a.	n.a.	3	3
IT	CLAAI	n.a.	n.a.	3	3
IT	ANIEM – Confapi	n.a.	n.a.	3	3
LT	LSA	Stable	n.a.	1	1
LU	GEBTP²⁷	Increased	n.a.	1	2
LU	<i>FDA</i>	Increased	n.a.	2	1
LV	LBP	Stable	n.a.	2 (or 1)	2 (or 1)
LV	<i>LBA</i>	Stable	n.a.	1 (or 2)	1 (or 2)
LV	LCBB	Stable	n.a.	3	3
MT	MEA	Increased	n.a.	1	1
NL	Bouwend NL	Stable	n.a.	1	1
NL	<i>AfNL</i>	Stable	n.a.	3	3
NL	Techniek Nederland	n.a.	n.a.	2	2
NL	OnderhoudNL	n.a.	4	3	3
PL	PZPB	Stable	<10	1	2
PL	<i>ZRP</i>	Decreased	<20	3	1
PL	KBiN	n.a.	<0.5	2	3
PT	Fepicop	Stable	27	1	1
PT	Aecops	n.a.	13	2	3
PT	AICCOPN	Stable	n.a.	3	2
PT	AICE	n.a.	<5	3	3
RO	<i>UNPR</i>	Increased	n.a.	3	2 (or 3)
RO	<i>Zepher Cluster</i>	Increased	<0.5	3	3
RO	ARACO	Stable	7–8	2 (or 1)	2 (or 3)
RO	FPSC	Increased	>10	1 (or 2)	1
SE	Byggföretagen	Increased	30	1	1
SE	MiS	Stable	3	3	3
SE	P&V	Stable	n.a.	3	3
SE	IN	n.a.	15	2	2
SE	ME	n.a.	5	3	3
SE	GBF	n.a.	1	3	3

²⁷ The GEBTP reported that ‘The FDA represents a great number of companies but not only from the construction industry but also companies from the finishing sector/craftsmanship.’ The GEBTP represents the majority of the large construction companies (40 construction companies) and therefore the majority of their employees (~15,000).

Member State (MS)	Employer organisation (EO)/Business association (BA)	Membership trend over three years covered (2018–2021)	Sectoral density in terms of employees (%)	Relative importance among large companies	Relative importance among SMEs
SI	GZS – CCBMIS	Stable	40	1	2
SI	ZDS	Stable	20	2	3
SI	<i>OZS</i>	Stable	10–20	3	1
SK	ZSPS	Decreased	10	1	2
SK	<i>SZZ</i>	Increased	0	2	1

Notes: *n.a.* = not available; sectoral density in % = ratio of the number of employees employed by member companies in the sector to the total number of employees in the sector; relative importance of employer organisation or business association: 1 = largest organisation in the sector in terms of membership, 2 = second largest organisation in the sector in terms of membership, 3 = smaller organisation in the sector in terms of membership. Organisations in green are the most important among large companies and those in yellow are the most important among SMEs in a country; organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in *italics* are affiliated to the EBC.

Source: NEC

2.5. Employer organisations' and business associations' involvement in collective bargaining

This section deals with the collective bargaining involvement of the sector-related employer organisations and business associations.

Table 33 shows that there is at least one employer organisation involved in sector-related collective bargaining in all Member States except Estonia, Lithuania and Poland. In addition, 16 of the 93 sector-related employer organisations and business associations are not involved in collective bargaining targeting construction workers (while 76 organisations are involved). Uninvolved organisations can be found in – in addition to the three countries mentioned above – Croatia, France, Greece, Hungary, Ireland, Romania, Slovakia and Slovenia. In all other countries, all of the sector-related employer organisations are engaged in sector-related collective bargaining. Almost all employer organisations that engage in collective bargaining in the construction sector are involved in multi-employer bargaining, often in combination with (complementary) single-employer bargaining on behalf of one or more individual companies. However, 66 employer organisations conclude only multi-employer agreements, and 10 organisations sign both multi-employer and single-employer collective agreements. There is only one employer organisation, namely MEA of Malta, that conducts single-employer bargaining on behalf of one company without signing a multi-employer collective agreement. In Greece, Pedmede and SATE were involved in sector-related multi-employer bargaining until the early 2010s, but the last agreement signed by them expired in 2013.

Table 33 also provides information on the construction subsectors of collective bargaining in which the employer organisations are involved. A total of 42 of the 93 employer organisations and business associations are involved in collective bargaining covering all three subsectors of construction (according to NACE 41, 42 and 43), which means that at least part of each subsector is covered. By contrast, 33 employer organisations could be identified that conclude agreements covering only (part of) one or two subsectors. This is due to the very particularistic membership domain (that is, tailored for a highly particularistic representation of interests of specific groups of companies) of many employer organisations in the construction sector. For FPSC of Romania, no information on

coverage in terms of subsectors was provided about the collective agreement this organisation has signed.

Table 33: Collective bargaining involvement of construction sector employer organisations and subsector coverage, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	Collective bargaining involvement at sector level	Collective bargaining involvement at company level	Covers at least part of NACE 41	Covers at least part of NACE 42	Covers at least part of NACE 43
EU27	93 EOs/BAs 27 MSs	75 EOs/BAs 23 MSs Not in EE, LT, MT, PL	12 EOs/BAs 9 MSs	48 EOs/BAs 21 MSs	48 EOs/BAs 21 MSs	73 EOs/BAs 23 MSs Not in EE, LT, PL, RO
FIEC	33 EOs/BAs 24 MSs	29 EOs/BAs 21 MSs	6 EOs/BAs 6 MSs	24 EOs/BAs 20 MSs	25 EOs/BAs 20 MSs	27 EOs/BAs 20 MSs
<i>EBC</i>	<i>18 EOs/BAs 15 MSs</i>	<i>9 EOs/BAs 8 MSs</i>	<i>1 EOs/BAs 1 MS</i>	<i>9 EOs/BAs 8 MSs</i>	<i>8 EOs/BAs 7 MSs</i>	<i>9 EOs/BAs 8 MSs</i>
AT	BIB	Yes	No	Yes	Yes	Yes
AT	FVBI	Yes	No	Yes	Yes	Yes
AT	<i>BIBHG</i>	Yes	No	Yes	Yes	Yes
AT	BIDGS	Yes	No	Yes	No	Yes
AT	BIHPFK	Yes	No	No	No	Yes
AT	BIHB	Yes	No	Yes	Yes	Yes
AT	BIMT	Yes	No	No	No	Yes
AT	BITHG	Yes	No	No	No	Yes
AT	FEEI	Yes	No	No	No	Yes
AT	Biegak	Yes	No	No	No	Yes
AT	BIM	Yes	No	No	No	Yes
AT	BISHL	Yes	No	No	No	Yes
BE	FEMA	Yes	No	Yes	Yes	Yes
BE	<i>Bouwunie</i>	Yes	Yes	Yes	Yes	Yes
BE	Embuild	Yes	Yes	Yes	Yes	Yes
BG	BCC	Yes	No	Yes	Yes	Yes
CY	OSEOK	Yes	No	Yes	Yes	Yes
CZ	SPS	Yes	Yes	Yes	Yes	Yes
DE	Bauindustrie	Yes	No	Yes	Yes	Yes
DE	ZDB	Yes	No	No	Yes	Yes
DE	ZVDH	Yes	No	No	No	Yes
DE	BV Farbe	Yes	No	No	No	Yes
DE	ZVEH	Yes	No	No	No	Yes
DE	DA	Yes	No	No	No	Yes
DE	ZVSHK	Yes	No	No	No	Yes
DK	DI Byggeri	Yes	Yes	Yes	Yes	Yes
DK	Tekniq	Yes	Yes	Yes	Yes	Yes
EE	EEEL	No	No	n/a	n/a	n/a
EL	Pedmede	No*	No	n/a	n/a	n/a
EL	SATE	No*	No	n/a	n/a	n/a
EL	POSEH	Yes	No	No	No	Yes
ES	CNC	Yes	No	Yes	Yes	Yes

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	Collective bargaining involvement at sector level	Collective bargaining involvement at company level	Covers at least part of NACE 41	Covers at least part of NACE 42	Covers at least part of NACE 43
FI	Palta	Yes	Yes	No	No	Yes
FI	STTA	Yes	n.a.	No	No	Yes
FI	TAFFEMC	Yes	No	No	No	Yes
FI	INFRA	Yes	n.a.	No	Yes	No
FI	RT	Yes	No	Yes	Yes	Yes
FI	MTA	Yes	No	No	Yes	No
FI	LVI TU	Yes	No	No	No	Yes
FI	GCF	Yes	No	Yes	No	Yes
FR	FNTP	Yes	No	No	Yes	Yes
FR	FFB	Yes	No	Yes	No	Yes
FR	<i>CAPEB</i>	Yes	No	Yes	No	Yes
FR	<i>SNSO</i>	No	No	n/a	n/a	n/a
FR	CNATP					
HR	HUP-UPG	Yes	Yes	Yes	Yes	Yes
HR	<i>HOK</i>	No	No	n/a	n/a	n/a
HU	ÉVOSZ	Yes	No	Yes	Yes	Yes
HU	<i>IPOSZ</i>	No	No	n/a	n/a	n/a
IE	CIF	Yes	Yes	Yes	Yes	Yes
IE	<i>NGMC</i>	No	No	n/a	n/a	n/a
IT	ANCE	Yes	No	Yes	Yes	Yes
IT	<i>Anaepa</i>	Yes	No	Yes	Yes	Yes
IT	Legacoop Produzione e Servizi	Yes	No	Yes	Yes	Yes
IT	Confcooperative Lavoro e Servizi	Yes	No	Yes	Yes	Yes
IT	AGCI Produzione e Lavoro	Yes	No	Yes	Yes	Yes
IT	<i>CNA Costruzioni</i>	Yes	No	Yes	Yes	Yes
IT	FIAE – Casartigiani	Yes	No	Yes	Yes	Yes
IT	CLAAI	Yes	No	Yes	Yes	Yes
IT	ANIEM – Confapi	Yes	No	Yes	Yes	Yes
LT	LSA	No	No	n/a	n/a	n/a
LU	GEBTP	Yes	No	Yes	Yes	Yes
LU	<i>FDA</i>	Yes	No	Yes	Yes	Yes
LV	LBP	Yes	No	Yes	Yes	Yes
LV	<i>LBA</i>	Yes	No	Yes	Yes	Yes
LV	LCBB	Yes	No	Yes	Yes	Yes
MT	MEA	No	Yes	No	No	Yes
NL	Bouwend NL	Yes	No	Yes	Yes	Yes
NL	<i>AfNL</i>	Yes	No	Yes	Yes	Yes
NL	Techniek Nederland	Yes	No	No	No	Yes

Member State (MS)	Employer organisation (EO)/Business association (BA)	Collective bargaining involvement at sector level	Collective bargaining involvement at company level	Covers at least part of NACE 41	Covers at least part of NACE 42	Covers at least part of NACE 43
NL	OnderhoudNL	Yes	No	No	No	Yes
PL	PZPB	No	No	n/a	n/a	n/a
PL	ZRP	No	No	n/a	n/a	n/a
PL	KBiN	No	No	n/a	n/a	n/a
PT	Fepicop	Yes	No	Yes	Yes	Yes
PT	Aecops	Yes	No	Yes	Yes	Yes
PT	AICCOPN	Yes	No	Yes	Yes	Yes
PT	AICE	Yes	No	Yes	Yes	Yes
RO	<i>UNPR</i>	No	No	n/a	n/a	n/a
RO	<i>Zepher Cluster</i>	No	No	n/a	n/a	n/a
RO	ARACO	No	No	n/a	n/a	n/a
RO	FPSC	Yes	No	n.a.	n.a.	n.a.
SE	Byggföretagen	Yes	No	Yes	Yes	Yes
SE	MiS	Yes	No	Yes	No	Yes
SE	P&V	Yes	Yes	No	No	Yes
SE	IN	Yes	n.a.	No	Yes	Yes
SE	ME	Yes	n.a.	No	Yes	Yes
SE	GBF	Yes	Yes	Yes	No	Yes
SI	GZS – CCBMIS	Yes	No	Yes	Yes	Yes
SI	ZDS	Yes	No	Yes	Yes	Yes
SI	OZS	No	No	n/a	n/a	n/a
SK	ZSPS	Yes	Yes	Yes	Yes	Yes
SK	SZZ	No	No	n/a	n/a	n/a

* The last collective agreement signed expired in 2013.

Notes: *n.a.* = not available; *n/a* = not applicable; Organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in italics are affiliated to the EBC.

Source: NEC

Table 34 gives an overview of the collective bargaining involvement of employer organisations with a special emphasis on coverage in terms of company size classes. A vast majority of organisations that engage in collective bargaining conclude multi-employer agreements covering all company size categories. Anaepa and FIAE – Casartigiani of Italy represent only microcompanies and thus conduct bargaining on behalf of only these very small enterprises. Conversely, the agreements signed by FPSC of Romania cover only companies with at least 20 employees according to the Romanian Labour Code amended in the early 2010s. In Slovakia, the agreements concluded by ZSPS de facto cover only larger companies employing at least 50 employees. Malta's MEA has concluded only one single-employer agreement on behalf of a company falling in the company size class of 50–249 employees and therefore de facto covers only this size class.

Table 34: Collective bargaining involvement of construction sector employer organisations/business associations and coverage in terms of company size classes, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	Collective bargaining involvement	1–9 employees	10–49 employees	50–249 employees	250+ employees
EU27	93 EOs/BAs 27 MSs	76 EOs/BAs 24 MSs Not in EE, LT, PL	67 EOs/BAs	66 EOs/BAs	64 EOs/BAs	59 EOs/BAs
FIEC	33 EOs/BAs 24 MSs	29 EOs/BAs 38% 21 MSs	26 EOs/BAs 39%	28 EOs/BAs 42%	29 EOs/BAs 45%	28 EOs/BAs 47%
<i>EBC</i>	<i>18 EOs/BAs 15 MSs</i>	<i>9 EOs/BAs 12% 8 MSs</i>	<i>9 EOs/BAs 13%</i>	<i>7 EOs/BAs 11%</i>	<i>7 EOs/BAs 11%</i>	<i>7 EOs/BAs 12%</i>
AT	BIB	MEB	Yes	Yes	Yes	Yes
AT	FVBI	MEB	Yes	Yes	Yes	Yes
AT	<i>BIBHG</i>	MEB	Yes	Yes	Yes	Yes
AT	BIDGS	MEB	Yes	Yes	Yes	Yes
AT	BIHPFK	MEB	Yes	Yes	Yes	Yes
AT	BIHB	MEB	Yes	Yes	Yes	Yes
AT	BIMT	MEB	Yes	Yes	Yes	Yes
AT	BITHG	MEB	Yes	Yes	Yes	Yes
AT	FEEL	MEB	Yes	Yes	Yes	Yes
AT	Biegak	MEB	Yes	Yes	Yes	Yes
AT	BIM	MEB	Yes	Yes	Yes	Yes
AT	BISHL	MEB	Yes	Yes	Yes	Yes
BE	FEMA	MEB	Yes	Yes	Yes	Yes
BE	<i>Bouwunie</i>	MEB + SEB	Yes	Yes	Yes	Yes
BE	Embuild	MEB	Yes	Yes	Yes	Yes
BG	BCC	MEB	Yes	Yes	Yes	Yes
CY	OSEOK	MEB	Yes	Yes	Yes	Yes
CZ	SPS	MEB + SEB	Yes	Yes	Yes	Yes
DE	Bauindustrie	MEB	n.a.	Yes	Yes	Yes
DE	ZDB	MEB	Yes	Yes	Yes	n.a.
DE	ZVDH	MEB	Yes	Yes	Yes	n.a.
DE	BV Farbe	MEB	Yes	Yes	Yes	n.a.
DE	ZVEH	MEB	Yes	Yes	Yes	Yes
DE	DA	MEB	Yes	Yes	Yes	Yes
DE	ZVSHK	MEB	Yes	Yes	Yes	n.a.
DK	DI Byggeri	MEB + SEB	Yes	Yes	Yes	Yes
DK	Tekniq	MEB + SEB	Yes	Yes	Yes	Yes
EE	EEEL	No	n/a	n/a	n/a	n/a
EL	Pedmede	No*	n/a	n/a	n/a	n/a
EL	SATE	No*	n/a	n/a	n/a	n/a
EL	POSEH	MEB	Yes	Yes	No	No
ES	CNC	MEB	Yes	Yes	Yes	Yes
FI	Palta	MEB + SEB	n.a.	n.a.	n.a.	n.a.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	Collective bargaining involvement	1–9 employees	10–49 employees	50–249 employees	250+ employees
FI	STTA	MEB	n.a.	n.a.	n.a.	n.a.
FI	TAFFEMC	MEB	Yes	Yes	n.a.	n.a.
FI	INFRA	MEB	Yes	Yes	Yes	Yes
FI	RT	MEB	Yes	Yes	Yes	Yes
FI	MTA	MEB	n.a.	n.a.	n.a.	n.a.
FI	LVI TU	MEB	Yes	Yes	Yes	Yes
FI	GCF	MEB	Yes	Yes	Yes	Yes
FR	FNTP	MEB	Yes	Yes	Yes	Yes
FR	FFB	MEB	Yes	Yes	Yes	Yes
FR	<i>CAPEB</i>	MEB	Yes	Yes	Yes	Yes
FR	<i>SNSO</i>	No	n/a	n/a	n/a	n/a
FR	CNATP	MEB				
HR	HUP-UPG	MEB + SEB	Yes	Yes	Yes	Yes
HR	<i>HOK</i>	No	n/a	n/a	n/a	n/a
HU	ÉVOSZ	MEB	Yes	Yes	Yes	Yes
HU	<i>IPOSZ</i>	No	n/a	n/a	n/a	n/a
IE	CIF	MEB + SEB	Yes	Yes	Yes	Yes
IE	<i>NGMC</i>	No	n/a	n/a	n/a	n/a
IT	ANCE	MEB	Yes	Yes	Yes	Yes
IT	<i>Anaepa</i>	MEB	Yes	No	No	No
IT	Legacoop Produzione e Servizi	MEB	Yes	Yes	Yes	Yes
IT	Confcooperative Lavoro e Servizi	MEB	Yes	Yes	Yes	Yes
IT	AGCI Produzione e Lavoro	MEB	n.a.	n.a.	n.a.	n.a.
IT	<i>CNA Costruzioni</i>	MEB	Yes	Yes	n.a.	n.a.
IT	FIAE – Casartigiani	MEB	Yes	No	No	No
IT	CLAAI	MEB	Yes	n.a.	n.a.	n.a.
IT	ANIEM – Confapi	MEB	Yes	Yes	n.a.	n.a.
LT	LSA	No	n/a	n/a	n/a	n/a
LU	GEBTP	MEB	Yes	Yes	Yes	Yes
LU	<i>FDA</i>	MEB	Yes	Yes	Yes	Yes
LV	LBP	MEB	Yes	Yes	Yes	Yes
LV	<i>LBA</i>	MEB	Yes	Yes	Yes	Yes
LV	LCBB	MEB	Yes	Yes	Yes	Yes
MT	MEA	SEB	No	No	Yes	No
NL	Bouwend NL	MEB	Yes	Yes	Yes	Yes
NL	<i>AfNL</i>	MEB	Yes	Yes	Yes	Yes
NL	Techniek Nederland	MEB	Yes	Yes	Yes	Yes
NL	OnderhoudNL	MEB	n.a.	n.a.	n.a.	n.a.
PL	PZPB	No	n/a	n/a	n/a	n/a

Member State (MS)	Employer organisation (EO)/Business association (BA)	Collective bargaining involvement	1–9 employees	10–49 employees	50–249 employees	250+ employees
PL	<i>ZRP</i>	No	n/a	n/a	n/a	n/a
PL	KBiN	No	n/a	n/a	n/a	n/a
PT	Fepicop ²⁸	MEB	Yes	Yes	Yes	Yes
PT	Aecops	MEB	Yes	Yes	Yes	Yes
PT	AICCOPN	MEB	Yes	Yes	Yes	Yes
PT	AICE	MEB	Yes	Yes	Yes	Yes
RO	<i>UNPR</i>	No	n/a	n/a	n/a	n/a
RO	<i>Zepher Cluster</i>	No	n/a	n/a	n/a	n/a
RO	ARACO	No	n/a	n/a	n/a	n/a
RO	FPSC	MEB	No	Yes	Yes	Yes
SE	Byggföretagen	MEB	Yes	Yes	Yes	Yes
SE	MiS	MEB	Yes	Yes	Yes	Yes
SE	P&V	MEB + SEB	Yes	Yes	Yes	Yes
SE	IN	MEB	Yes	Yes	Yes	Yes
SE	ME	MEB	Yes	Yes	Yes	Yes
SE	GBF	MEB + SEB	Yes	Yes	Yes	Yes
SI	GZS – CCBMIS	MEB	Yes	Yes	Yes	Yes
SI	ZDS	MEB	Yes	Yes	Yes	Yes
SI	<i>OZS</i>	No	n/a	n/a	n/a	n/a
SK	ZSPS	MEB + SEB	No	No	Yes	Yes
SK	<i>SZZ</i>	No	n/a	n/a	n/a	n/a

* The last collective agreement signed expired in 2013.

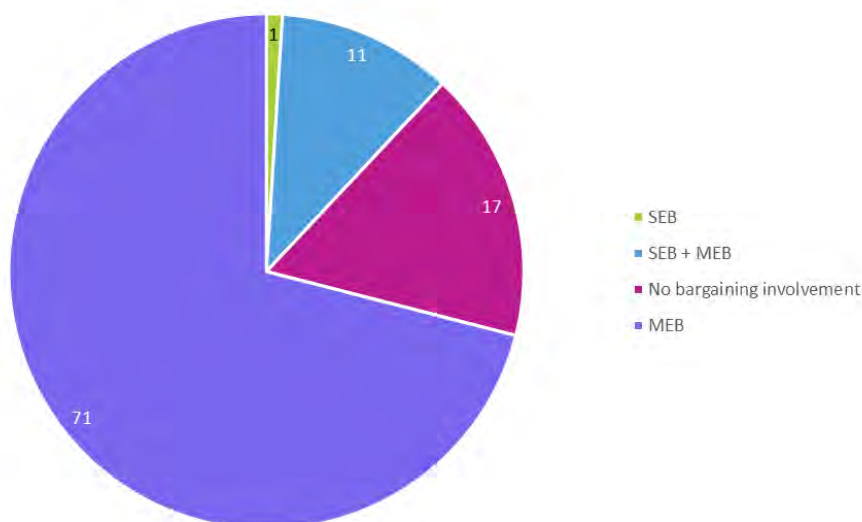
Notes: *n.a.* = not available; *n/a* = not applicable; MEB = multi-employer bargaining; SEB = single-employer bargaining. Organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in italics are affiliated to the EBC.

Source: NEC

Figure 16 outlines the distribution of the employer organisations' different forms of collective bargaining involvement. Whereas 17% of the employer organisations and business associations do not engage in collective bargaining related to the construction sector at all, more than two-thirds (71%) of the organisations are involved in pure multi-employer bargaining. In addition, 11% conclude both multi-employer and single-employer agreements, and just one organisation (MEA of Malta) signs a company agreement on behalf of a single employer without any further involvement in multi-employer bargaining.

²⁸ Fepicop is an umbrella organisation of Aecops and AICCOPN.

Figure 16: Involvement of construction sector employer organisations/business associations in different forms of collective bargaining (%), 2021



Notes: MEB = multi-employer bargaining; SEB = single-employer bargaining. Percentages are rounded. N = 93.

Source: NEC

2.6. Involvement of employer organisations and business associations in social dialogue and consultation practices

This section analyses the employer organisations' and business associations' involvement in tripartite and bipartite social dialogue related to the sector and in paritarian bodies and organisations dealing with sector-related issues. Moreover, this section looks at the organisations' consultation by governments on sector-related matters.

Table 35 indicates that at least 64 employer organisations and business associations participate in bipartite or tripartite social dialogue structures targeting the construction sector (for five organisations, data on their participation were not available). A list of social dialogue bodies, including the trade unions and employer organisations/business associations participating, is presented in Section 2.8.

Overall, 46 employer organisations and business associations could be identified that participate in paritarian organisations dealing with sector-related issues (for three organisations, no information was provided). A list of paritarian organisations related to the construction sector, indicating the trade unions and employer organisations/business associations participating, is provided in Section 2.9.

As far as data are available, 71 of the 93 employer organisations and business associations are consulted by governments on sector-related issues. Consultation takes place regularly with 36 organisations and on an ad hoc basis with 31 organisations, while for 4 organisations in Sweden consultation practices take place but were not specified. No related information was provided for 14 organisations (Table 35).

Table 35: Involvement of construction sector employer organisations and business associations in social dialogue and consultation practices, 2021

Member State (MS)	Employer organisation (EO)/Business association (BA)	Involvement in bipartite/tripartite social dialogue	Involvement in paritarian organisations	Consultation by government
EU27	93 EOs/BAs 27 MSs	64 EOs/BAs 22 MSs Not in CY, EE, LT, LU, MT	46 EOs/BAs 14 MSs In AT, BE, CY, DE, DK, EL, ES, FR, IE, IT, NL, PT, RO, SE	71 EOs/BAs 25 MSs Not in BG, LU
FIEC	33 EOs/BAs 24 MSs	29 EOs/BAs 20 MSs	20 EOs/BAs 14 MSs	29 EOs/BAs 22 MSs
<i>EBC</i>	<i>18 EOs/BAs 15 MSs</i>	<i>11 EOs/BAs 10 MSs</i>	<i>8 EOs/BAs 7 MSs</i>	<i>14 EOs/BAs 13 MSs</i>
AT	BIB	Yes	Yes	Ad hoc
AT	FVBI	Yes	Yes	Ad hoc
AT	<i>BIBHG</i>	Yes	Yes	Ad hoc
AT	BIDGS	Yes	Yes	Ad hoc
AT	BIHPFK	Yes	Yes	Ad hoc
AT	BIHB	Yes	Yes	Ad hoc
AT	BIMT	Yes	Yes	Ad hoc
AT	BITHG	No	No	Ad hoc
AT	FEEI	No	No	No
AT	Biegak	n.a.	No	n.a.
AT	BIM	n.a.	No	n.a.
AT	BISHL	n.a.	No	n.a.
BE	FEMA	Yes	Yes	Regularly
BE	<i>Bouwunie</i>	Yes	Yes	Regularly
BE	Embuild	Yes	Yes	Regularly
BG	BCC	Yes	No	No
CY	OSEOK	No	Yes	Regularly
CZ	SPS	Yes	No	Ad hoc
DE	Bauindustrie	Yes	Yes	Regularly
DE	ZDB	Yes	Yes	Regularly
DE	ZVDH	No	Yes	Regularly
DE	BV Farbe	No	Yes	n.a.
DE	ZVEH	No	No	Regularly
DE	DA	No	No	Regularly
DE	ZVSHK	No	No	n.a.
DK	DI Byggeri	Yes	Yes	Ad hoc
DK	Tekniq	Yes	Yes	Ad hoc
EE	EEEL	No	No	Regularly
EL	Pedmede	Yes	Yes	Regularly
EL	SATE	n.a.	n.a.	Regularly
EL	POSEH	No	Yes	Regularly
ES	CNC	Yes	Yes	Regularly
FI	Palta	No	No	n.a.
FI	STTA	No	No	n.a.
FI	TAFFEMC	Yes	No	n.a.

Representativeness of the European social partner organisations: Construction sector

Member State (MS)	Employer organisation (EO)/Business association (BA)	Involvement in bipartite/tripartite social dialogue	Involvement in paritarian organisations	Consultation by government
FI	INFRA	Yes	No	Ad hoc
FI	RT	Yes	No	Ad hoc
FI	MTA	No	No	No
FI	LVI TU	Yes	No	Ad hoc
FI	GCF	Yes	No	Ad hoc
FR	FNTP	Yes	Yes	Regularly
FR	FFB	Yes	Yes	Regularly
FR	CNATP			
FR	<i>CAPEB</i>	Yes	Yes	Regularly
FR	<i>SNSO</i>	No	No	No
HR	HUP-UPG	Yes	No	Regularly
HR	<i>HOK</i>	No	No	Regularly
HU	ÉVOSZ	Yes	No	Regularly
HU	<i>IPOSZ</i>	Yes	No	Ad hoc
IE	CIF	Yes	Yes	Regularly
IE	<i>NGMC</i>	No	Yes	Ad hoc
IT	ANCE	Yes	Yes	Regularly
IT	<i>Anaepa</i>	Yes	Yes	Ad hoc
IT	Legacoop Produzione e Servizi	Yes	Yes	Ad hoc
IT	Confcooperative Lavoro e Servizi	Yes	Yes	Ad hoc
IT	AGCI Produzione e Lavoro	Yes	Yes	Ad hoc
IT	<i>CNA Costruzioni</i>	Yes	Yes	Ad hoc
IT	FIAE – Casartigiani	Yes	Yes	Ad hoc
IT	CLAAI	Yes	Yes	n.a.
IT	ANIEM – Confapi	Yes	Yes	Ad hoc
LT	LSA	No	No	Ad hoc
LU	GEBTP	No	No	No
LU	<i>FDA</i>	No	No	No
LV	LBP	Yes	No	Regularly
LV	<i>LBA</i>	Yes	No	Regularly
LV	LCBB	Yes	No	Regularly
MT	MEA	No	No	Ad hoc
NL	Bouwend NL	Yes	Yes	Regularly
NL	<i>AfNL</i>	Yes	Yes	Ad hoc
NL	Techniek Nederland	Yes	No	Regularly
NL	OnderhoudNL	Yes	No	n.a.
PL	PZPB	Yes	No	Regularly
PL	<i>ZRP</i>	Yes	No	Regularly
PL	KBiN	Yes	No	Regularly
PT	Fepicop	Yes	Yes	n.a.
PT	Aecops	Yes	Yes	n.a.
PT	AICCOPN	Yes	Yes	Regularly
PT	AICE	No	No	n.a.

Member State (MS)	Employer organisation (EO)/Business association (BA)	Involvement in bipartite/tripartite social dialogue	Involvement in paritarian organisations	Consultation by government
RO	<i>UNPR</i>	No	No	Regularly
RO	<i>Zepher Cluster</i>	No	No	No
RO	ARACO	Yes	Yes	Regularly
RO	FPSC	Yes	Yes	Ad hoc
SE	Byggföretagen	Yes	Yes	Regularly
SE	MiS	Yes	Yes	Ad hoc
SE	P&V	Yes	Yes	Yes
SE	IN	Yes	Yes	Yes
SE	ME	Yes	Yes	Yes
SE	GBF	Yes	n.a.	Yes
SI	GZS – CCBMIS	Yes	No	Ad hoc
SI	ZDS	Yes	No	Ad hoc
SI	<i>OZS</i>	No	No	No
SK	ZSPS	Yes	No	Regularly
SK	<i>SZZ</i>	Yes	No	Regularly

Notes: *n.a.* = not available. Organisations in **bold** are affiliated to the FIEC (including indirect members affiliated through a higher-order or lower-order unit); organisations in italics are affiliated to the EBC.

Source: NEC

2.7. The system of sector-related collective bargaining

As outlined previously, the representativeness of the national social partner organisations is important for the implementation of any agreements made by the European-level organisations. The relevance of European sectoral social dialogue tends to increase along with the ability of the national affiliates of the European organisations to regulate employment terms and influence national public policies affecting the sector (Perin and Léonard, 2011).

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). This correlation is also evident in the analysis of construction sector organisations' involvement in bipartite and tripartite bodies (see Sections 2.3 and 2.6). Multi-employer bargaining tends to have greater significance, primarily because of the macroeconomic impact of such agreements.

The coverage of different types of collective bargaining is summarised in Table 36. Only a small proportion (5%) of the trade unions in the construction sector are not involved in collective bargaining. Among the 77 trade unions, 64 (83%) are involved in multi-employer bargaining. Of those, 11 (14%) only participate in multi-employer bargaining, while 53 (69%) are involved in both multi-employer and single-employer bargaining. The remaining nine trade unions (12%) are only involved in single-employer bargaining.

Among the 93 employer organisations and business associations in the construction sector, 77 (83%) are involved in collective bargaining. Most of them (76, or 82%) are involved in multi-employer bargaining, 66 (71%) take part in multi-employer bargaining only and 10 (11%) also participate in single-employer bargaining. Just one organisation (1%) is involved in only single-employer bargaining. While in Malta an employer organisation negotiates on behalf of individual companies, companies in other countries with exclusive single-employer bargaining, such as Estonia, Lithuania

and Poland, are the bargaining parties on the employer side; thus, there is no employer organisation in these countries acting as a bargaining party in the sector.

Table 36: Collective bargaining in the construction sector (number and % of total), 2021

Collective bargaining	Trade unions				Employer organisations/ business associations					
	No collective bargaining	4 (5%)				77 (100%)	16 (17%)			
MEB only	11 (14%)	64 (83%)	62 (81%)	73 (95%)		66 (71%)	76 (82%)	11 (12%)	77 (83%)	
Both MEB and SEB	53 (69%)					10 (11%)				
SEB only	9 (12%)	1 (1%)								

Notes: MEB = multi-employer bargaining; SEB = single-employer bargaining.

Source: NEC

Table 37 outlines the collective bargaining information on a country-by-country basis, illustrating the different national collective bargaining patterns. Table 38 combines the information related to the types of collective bargaining with the information on collective bargaining coverage rates in the construction sector for each Member State. This table indicates that overall (with the notable exceptions of Bulgaria and Greece) exclusive or dominant multi-employer bargaining in the sector results in high collective bargaining coverage rates. Interestingly, in the construction sector in Croatia, Cyprus, Hungary and Latvia multi-employer collective bargaining has been established with very high coverage rates of more than 95%, whereas most other sectors of those countries' economies are characterised by industrial relations systems shaped by occasional single-employer arrangements. In the very few countries (Estonia, Lithuania, Malta and Poland) with exclusively single-employer bargaining in the sector, the collective bargaining coverage rates are very low, in all cases not exceeding 5% (although the rate of Estonia could not be verified).

Table 37: Type of collective bargaining by Member State, 2021

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

Source: NEC

Table 38: Collective bargaining coverage by type of bargaining, 2021

Type of collective bargaining	Collective bargaining coverage (%)					Information not available
	95–100	75–94	50–74	25–49	1–24	
Multi-employer bargaining	AT	PT			EL ²⁹	
Multi-employer bargaining and single-employer bargaining	BE, CY, DE, ES, FR, HR, HU, IT, LU, LV, NL, SE	FI, SK	CZ, DK, IE, RO, SI		BG	
Single-employer bargaining					LT, MT, PL	EE

Source: NEC

2.8. Participation in tripartite and bipartite social dialogue bodies

The common involvement in tripartite and/or bipartite bodies that deal with sector-related topics and issues and involve sector-related actors implies some kind of mutual recognition. In particular, in EU Member States without established practices of comprehensive multi-employer bargaining, this involvement can be a way to gain or strengthen mutual recognition as representative counterparts. Table 39 indicates the trade unions and employer organisations/business associations that participate in such sector-related social dialogue bodies. In total, 42 tripartite or bipartite bodies from 19 Member States could be identified. In terms of sector-relatedness, it is not always completely clear whether these are strictly sector-related or part of a wider setting.

The EFBWW has member unions involved in sectoral social dialogue structures in 18 of the 19 Member States with participating bodies (unions marked in black bold in Table 39). Portugal is the only exception where there is no involvement of a trade union affiliated to the EFBWW. The FIEC has member organisations involved in sectoral social dialogue at the Member State level in 16 of the 19 Member States (organisations in blue bold in Table 39). Malta, the Netherlands and Poland are the three Member States where there is national sectoral social dialogue without an FIEC member involved. The EBC has member organisations involved in national sectoral social dialogue in six Member States (organisations marked in red in Table 39): Belgium, France, Italy, Latvia, Poland and Spain. For Spain, the employer organisation the CNC is affiliated to both the FIEC and the EBC.

²⁹ In Greece, the low coverage rate of workers under the sectoral collective agreement in the construction industry is the result of the existing legislative framework concerning the expansion mechanism of the collective agreements – that is, their declaration as ‘generally mandatory’ to be applied by all employers. According to the legislation, a collective labour agreement initially binds the members of the organisations (both employer organisations/business organisations and trade unions) that sign it. However, typically employer organisations/business organisations in Greece refuse to officially provide information on their member companies and the number of workers they employ. This makes it difficult to calculate the number of employees covered by the collective labour agreements. Based on this information, we can reasonably assume that generally in Greece the coverage rate of collective agreements is not high, as many employers are reluctant to commit to collective agreements and prefer to pay their employees either the minimum wage or through individual agreements.

Table 39: Tripartite and bipartite social dialogue bodies in which sector-related issues are dealt with, and social partner participation, 2021

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
AT	Environment and Construction (Umwelt + Bauen)	Bipartite	Sustainability initiative for the construction industry	Agreement	GBH	BIB
AT	Initiative Fair Procurement (Initiative Faire Vergaben)	Bipartite	Initiative to acknowledge social and environment criteria rather than only price in procurement procedures	Agreement	GBH, PRO-GE, GPA	BIB , FVBI , other employer organisations in the construction sector
BE	Fonds voor Bestaanszekerheid van de werklieden uit het bouwbedrijf	Bipartite	Social fund	Statutory	ACV-CSC BIE, ACLVB-CGSLB, ABVV-FGTB ACCG	Embuild , Bouwunie , FEMA
BE	Fonds voor Bestaanszekerheid voor de aanvullende pensioenen van de werklieden uit het bouwbedrijf	Bipartite	Social fund	Statutory	ACV-CSC BIE, ACLVB-CGSLB, ABVV-FGTB ACCG	Embuild , Bouwunie , FEMA
BE	Joint Committee 124	Bipartite	Joint committee	Statutory	ACV-CSC BIE, ACLVB-CGSLB, ABVV-FGTB ACCG	Embuild , Bouwunie , FEMA
BE	Joint Committee 200	Bipartite	Joint committee	Statutory	n.a.	n.a.
BG	Tripartite Cooperation Council	Tripartite	Construction	Statutory	FITUC , FCIW	BCC , Bulgarian Branch Chamber 'Roads'
CY	None					
CZ	Bipartite platform Construction I	Bipartite	Focused on large companies – education in the sector, job evaluations, Industry 4.0, impact studies, surveys	Agreement	OS Stavba	SPS

Representativeness of the European social partner organisations: Construction sector

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
CZ	Bipartite platform Construction II	Bipartite	Focused on SMEs – education in the sector, job evaluations, Industry 4.0, impact studies, surveys	Agreement	OS Stavba	SPS
DE	None					
DK	Trade Association for Health and Safety in Construction (authors' own translation) (Branchefællesskabet for Arbejdsmiljø i Bygge og Anlæg, BFA Bygge- og Anlæg)	Bipartite	Helps to identify the industry's specific health and safety problems and publishes industry guidelines and training materials on good health and safety practice	Agreement	3F, BAT-Kartellet, Blik&Rør, DEF, Dansk Metal, TL, KF, HK, LH, DFF	DI Byggeri, Tekniq, Danske Malermestre, Glarmesterlauget, AI
DK	Safety and Health Preventive Service Bus for the Construction Sector (Byggeriets Arbejdsmiljøbus, BAM-BUS)	Bipartite	Established to help companies, safety representatives and employees to develop and ensure safe and healthy working conditions and prevent accidents at construction sites. Non-governmental service institution financed by the Construction Sector Development Foundation	Agreement	3F, Blik&Rør, Dansk Metal, DEF	DI Byggeri, DIB, Kooperationen, Dansk Håndværk, Glarmesterlauget, Bygherreforeningen
EE	None					
EL	None					
ES	General Negotiating Commission for the General (National) Collective Agreement in the Construction Sector	Bipartite	Working conditions	Agreement	CCOO del Hábitat, UGT FICA	CNC (also a member of the EBC)

Representativeness of the European social partner organisations: Construction sector

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
ES	Paritarian Commission for the General (National) Collective Agreement in the Construction Sector	Bipartite	Working conditions	Agreement	CCOO del Hábitat, UGT FICA	CNC (also a member of the EBC)
ES	Paritarian Commission for Training	Bipartite	Training	Agreement	CCOO del Hábitat, UGT FICA	CNC (also a member of the EBC)
FI	Centre for Occupational Safety's Working Group on Safety at Work (Construction Sector)	Bipartite	Occupational safety	Agreement (probably)	RL, Pro, TEK (YTN affiliate)	LVI TU, RT, INFRA
FR	Professional Prevention Organisation for the Building and Public Works Sector (Organisme Professionnel de Prévention du Bâtiment et des Travaux Publics)	Bipartite	Prevention of accidents at work and occupational diseases and improvement of working conditions	Statutory	CGT, CFDT, CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FNTP, FNSCOP BTP
FR	Pro Building and Public Works Sector (Pro Bâtiment et des Travaux Publics)	Bipartite	Social protection (pension, provident funds, health, savings, insurance, holidays and social action)	Agreement	CGT, FNSCBA CGT, CFDT, CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FFIE, FNTP, FNSCOP BTP
FR	Committee for Consultation and Coordination of Apprenticeship in the Building and Public Works Sector (Comité de concertation et de coordination de l'apprentissage du bâtiment et des travaux publics)	Bipartite	Body responsible for implementing the policy of initial vocational training in construction trades through apprenticeships defined by the social partners in the building and public works sector	Agreement	FNSCBA CGT, FNCB-CFDT, BATI-MAT-TP CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FNTP, FNSCOP BTP

Representativeness of the European social partner organisations: Construction sector

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
FR	Observatory of Building and Public Works Trades (Observatoire des métiers du bâtiment et des travaux publics)	Bipartite	Main missions are to anticipate quantitative and qualitative changes in activity, jobs, trades and qualifications in the building and public works sector; and to provide social partners with statistical and qualitative analyses and decision-making tools on issues of employment, skills and training	Agreement	FNSCBA CGT, FNCB-CFDT, BATI-MAT-TP CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FNTP, FNSCOP BTP
FR	OPCO Constructys	Bipartite	Skills operator for the construction sector; contributes to the development of vocational training for employees in several branches, including construction	Agreement	FNSCBA CGT, FNCB-CFDT, BATI-MAT-TP CFTC, CFE-CGC BTP, FG-FO	CAPEB, FFB, FDMC,³⁰ FNTP, FNSCOP BTP
HR	Social Council Construction	Bipartite	Working conditions, salaries, health and safety at work	Agreement	SGH	HUP-UPG
HU	Construction Industry Sectoral Collective Dialogue Committee (ÁPB)	Bipartite	Social dialogue on topics concerning workers in the construction sector	Statutory	ÉFÉDOSZSZ	ÉVOSZ³¹

³⁰ FDMC represents companies from the building materials trader sector, which is not covered by this representativeness study.

³¹ The EBC reported that its member organisation **IPOSZ** is trying to enter this social dialogue structure.

Representativeness of the European social partner organisations: Construction sector

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
HU	Sectoral Skill Council in Construction Industry (Ágazati Készség Tanács)	Tripartite – operating in partnership with the Chamber of Commerce and Industry	Vocational training	Statutory	ÉFÉDOSZSZ	EVOSZ
IE	Construction National Joint Industrial Council (CNJIC)	Bipartite	Industrial relations	Agreement	SIPTU, Connect, Unite, BATU, Opatsi	CIF
IE	Construction Workers' Pension Scheme (CWPS)	Bipartite	Pension scheme	Agreement	SIPTU, Connect, Unite, BATU, Opatsi	CIF
IT	Unified Institute for Education and Safety at Work in Construction (Unico la sicurezza Ente Unico Formazione e Sicurezza, Formedil) ³²	Bipartite	Vocational training, health and safety at work	Agreement	Fenealuil, FILCA CISL, Fillea CGIL	ANCE, Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, AGCI Produzione e Lavoro, Anaepa, CNA Costruzioni, FIAE – Casartigiani, CLAAI, ANIEM – Confapi
IT	Paritarian National Commission for Sectoral Funds (Commissione nazionale paritetica per le Casse Edili, CNCE)	Bipartite	Coordination of sectoral paritarian funds for construction workers (Casse Edili/Edilcasse), fair competition	Agreement	Fenealuil, FILCA CISL, Fillea CGIL	ANCE, Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, AGCI Produzione e Lavoro, Anaepa, CNA Costruzioni, FIAE – Casartigiani, CLAAI, ANIEM – Confapi

³² In 2022, Formedil absorbed the National Commission for Accident Prevention, Hygiene and the Work Environment (Commissione nazionale per la prevenzione infortuni, l'igiene e l'ambiente di lavoro, CNCPT).

Representativeness of the European social partner organisations: Construction sector

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
IT	Prevedi – Fondo Pensione dei lavoratori edili IT	Bipartite	Pensions	Agreement	Fenealuil, FILCA CISL, Fillea CGIL	ANCE, Anaepa, CNA Costruzioni, FIAE – Casartigiani, CLAAI
IT	Sanedil – Fondo di Assistenza Sanitaria Integrativa dedicato ai lavoratori delle imprese edili e affini	Bipartite	Healthcare	Agreement	Fenealuil, FILCA CISL, Fillea CGIL	ANCE, Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, AGCI Produzione e Lavoro, Anaepa, CNA Costruzioni, FIAE – Casartigiani, CLAAI, ANIEM – Confapi
LT	None					
LU	None					
LV	Stakeholder Committee for the Building Industry's General Agreement	Bipartite	Reviews issues related to the implementation and application of the general agreement and the proposed amendments to the general agreement, including changes to the minimum wage and the minimum hourly rate, at least once every calendar year from the date when the general agreement becomes applicable. Is authorised to sign any amendments, additions and termination clauses of the general agreement	Agreement	LBNA	LBA, LCBB, LBP

Representativeness of the European social partner organisations: Construction sector

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
MT	Building Industry Consultative Council (BICC)	Tripartite	Five working groups: <ul style="list-style-type: none"> • Education, Training, Classification and Registration • Property Market • Regeneration of Property • Research and Innovation • Building Regulations and EU Directives Objectives are to provide a forum to discuss problems and issues related to the building construction sector, and to advise the government and the private sector on ways to upgrade and monitor the building industry. Also committed to stimulating research and developing important activities related to Malta's economic and ecological features	Statutory – set up on 3 November 1997 by Parliamentary Resolution 74 of the same year	Forum Unions Maltin (FOR.U.M), GWU , UHM Voice of the Workers	Malta Chamber of SMEs, The Malta Chamber, Malta Development Association (MDA), which includes the Federation of Estate Agents and the Federation of Building Contractors
NL	Social and Economic Council (SER)	Tripartite	Advisory and research body, and forum for policy negotiations	Statutory	CNV Vakmensen, FNV , VCP	VNO-NCW, LTO
NL	Stichting van de Arbeid (StvdA)	Bipartite	National-level negotiation forum and advisory organisation	Agreement (probably)	CNV Vakmensen, FNV , VCP	VNO-NCW, LTO
PL	Tripartite Team for Construction Industry and Municipal Economy	Tripartite	Working and employment conditions in the sector	Agreement	ZZ Budowlani, SBiPD NSZZ Solidarność , PZITB	PZPB, ZRP , KBiN

Representativeness of the European social partner organisations: Construction sector

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
PL	Sectoral Council of Competencies in the Construction Industry	Tripartite	Discussing the introduction of new occupations/ qualifications into the educational system when needed by the sector	Agreement	ZZ Budowlani, SBiPD NSZZ Solidarność, PZITB	PZPB, ZRP , KBiN
PL	Council of the Chief Labour Inspector for Work Safety in Construction	Tripartite	Health and safety issues in the sector	Agreement	ZZ Budowlani, SBiPD NSZZ Solidarność, PZITB	PZPB, ZRP , KBiN
PT	National Campaign for the Prevention of Occupational Risks in the Use of Machinery and Work Equipment (2015–2016)	Tripartite	Health and safety, prevention of risks; priority areas: construction distribution, agriculture, manufacturing	Agreement between the Authority for Working Conditions (ACT), social partners and other parties involved	From the sector: Feviccom Several unions from other sectors and the confederations CGTP-IN and UGT	From the sector: Aecops and AICCOPN Several employer organisations and business associations from other sectors and the confederations CAP, CIP and CCP
RO	Builders' Sectoral Vocational Training Board (Comitetului Sectorial din Construcții)	Bipartite	Training and education	Statutory	FGS Familia	FPSC, ARACO
SE	Swedish Construction Sector Development Fund (Svenska Byggbranschens Utvecklingsfond, SBUF)	Bipartite	Research: trade unions and employer organisations can apply for funding that is dedicated to research within the construction sector	n.a.	Byggnads, Ledarna, SEKO	Byggföretagen , IN
SE	Byggbranschens yrkesnämnd (BYN)	Bipartite	Education	n.a.	Byggnads, SEKO	Byggföretagen , ME

Representativeness of the European social partner organisations: Construction sector

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Trade unions with representatives	Employer organisations/ business associations with representatives
SE	Fair Construction and Fair Competition (Schyssta byggen och sund konkurrens)	Bipartite, but funded by the state	Health and safety, labour market, fair competition Project financed by the Swedish Work Environment Authority to combat fraudulent labour. Develops mutual tools against undeclared labour Not permanent, but aimed at posted workers/undeclared labour; included for interest	n.a.	Byggnads, Elektrikerna, Ledarna, SEKO, Unionen	Byggföretagen , GBF, IN, ME, P&V, MiS
SE	High schools: several vocational high schools for occupations in the construction sector (construction, plumbing, electric work, heating, ventilation and air conditioning, various machine operators, etc.) run by social partners	Tripartite	Education	n.a.	Elektrikerna, Byggnads	ME, Installationsföretagen, Byggföretagen
SI	None					
SK	None					

Notes: n.a. = not available. The black **bold** trade unions are those that are affiliated to the EFBWW and as such represented in the ESSDC; the blue **bold** employer organisations are those affiliated to the FIEC and as such represented in the ESSDC; the red organisations are affiliated to the EBC.

Source: NEC

2.9. Participation in paritarian organisations

Apart from tripartite and bipartite social dialogue bodies, sector-related social partner organisations may also be involved in paritarian organisations. These organisations are social protection institutions established and managed by trade unions and employers or employer organisations on a joint basis, usually within the framework of collective agreements (although their origin may also be statutory). These institutions are all not-for-profit organisations and deal with topics and issues related to retirement schemes, occupational pension funds, complementary healthcare insurance, long-term care, health and safety at work, paid holiday schemes, unemployment benefit funds and some other issues. These paritarian organisations are characterised by their joint management by social partners on an equal or parity basis, which means that the governance of these institutions is based on the equal representation of employers and employees in their governing bodies.

Construction is one of the sectors where paritarian organisations play a particularly significant role owing to the vulnerability of many employees in the sector and the specific needs of the sector's workforce in terms of several aspects of social protection, such as the topics listed above.

Table 40 includes 24 paritarian organisations, plus 1 non-paritarian organisation, from 12 countries that could be identified in the construction sector. The table contains information on the social partners participating in these institutions, the types of activities the organisations run and the parts of the sector covered by the organisations' activities. Moreover, information about the origin of the organisations is provided. In this context, it is important to note that – although the organisations are jointly managed by the social partners of the two sides of industry on a parity basis – their origins need not necessarily be a collective agreement. In a few cases, such as Austria's BUAK, France's OPP BTP and Romania's Builders' Social Fund, the paritarian organisations are statutory bodies under public law, albeit jointly administered by the social partners themselves.

Organisations in green and bold in Table 40 are affiliated to the European Association of Paritarian Institutions (AEIP). The AEIP has six affiliated paritarian organisations in six Member States (Austria, Germany, Ireland, Italy, Romania, Spain).

In all 12 Member States where there are sectoral paritarian organisations, social partners affiliated to the EFBWW and/or the FIEC are involved in the organisations. The EFBWW has affiliated trade unions in all sectoral paritarian organisations, and the FIEC has in all but one (in Denmark). The EBC has a member organisation involved in paritarian organisations in six Member States – Austria, Belgium, France, Italy, the Netherlands and Spain – but not in the six other Member States where there are paritarian organisations: Cyprus, Denmark, Germany, Ireland, Romania and Sweden.

Table 40: Paritarian organisations in construction, their origin, activities and coverage, and social partner participation, 2021

Member State	Organisation	Origin	Involvement of social partners		Domain of activity	Sector coverage		
			Trade union	Employer organisation/ business association		NACE	Company size	% of all workers
AT	Construction Workers' Annual Leave and Severance Pay Fund (Bauarbeiter-Urlaubs- und Abfertigungs-kasse, BUAK)	Statutory body under public law. Nevertheless, it is a social partners' institution since its leadership is nominated on equal terms by labour and business	GBH	WKO (BIB , FVBI and BIBHG)	Pension fund, paid holiday scheme, vocational education and training, unemployment 'bridging' allowance, severance pay scheme, bad weather compensation scheme	All: NACE 41, 42, 43	All size classes	100
BE	Social Security Fund of Construction Workers (Fonds voor Bestaanszekerheid van de werklieden uit het bouwbedrijf)	MSB/CSB	ACV-CSC BIE , ABVV-FGTB ACCG , ACLVB-CGSLB	Embuild , Bouwunie , FEMA	Healthcare and provident funds, occupational health activities, vocational education and training	All: NACE 41, 42, 43	All size classes	100
BE	Social Security Fund for supplementary pensions for construction workers (Fonds voor Bestaanszekerheid voor de aanvullende pensioenen van de werklieden uit het Bouwbedrijf)	MSB/CSB	ACV-CSC BIE , ABVV-FGTB ACCG , ACLVB-CGSLB	Embuild , Bouwunie , FEMA	Pension fund	All: NACE 41, 42, 43	All size classes	100
BG	None							

Representativeness of the European social partner organisations: Construction sector

CY	'O Oikodemos' Centre for Training Certification	MEB	PEO, OOIM-SEK	OSEOK	Vocational education and training, other activities	All: NACE 41, 42, 43	All size classes	100
CY	Pension, Healthcare, Welfare and Aid Funds	MEB	PEO, OOIM-SEK	OSEOK	Pension fund, healthcare and provident funds	All: NACE 41, 42, 43	All size classes	100
CZ	None							
DE	SOKA-BAU	MEB	IG BAU	Bauindustrie, ZDB	Pension fund, paid holiday scheme, vocational education and training, other activities	All: NACE 41, 42, 43	All size classes	100
DK	Development Fund for Construction (Bygge- og Anlægsbranchens Udviklingsfond)	MEB	DEF, Blik&Rør, Dansk Metal, 3F	DI Byggeri	Vocational education and training	All: NACE 41, 42, 43	All size classes	60
DK	Development Fund for the Electricity Industry (Elbranchens kompetenceudviklings-fond)	MEB	DEF	Tekniq	Vocational education and training	NACE 43	All size classes	10–20
EE	None							
EL	None							
ES	Labour Foundation of Construction (Fundación Laboral de la Construcción)	MEB	CCOO del Hábitat, UGT FICA	CNC (also a member of the EBC)	Occupational health activities, vocational education and training, employment and unemployment, other activities	All: NACE 41, 42, 43	All size classes	100
FI	None							

Representativeness of the European social partner organisations: Construction sector

FR	OPP BTP	Statutory, created by a ministerial order in 1947	FNSCBA CGT, FNCB-CFDT, BATI-MAT-TP CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FNTF, FNSCOP BTP	Occupational health activities	All: NACE 41, 42, 43	All size classes	100
FR	Pro BTP	MEB	CGT, FNSCBA CGT, CFDT, CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FFIE, FNTF, FNSCOP BTP	Pension fund, healthcare and provident funds, saving schemes	All: NACE 41, 42, 43	All size classes	100
FR	CCCA-BTP	n.a.	FNSCBA CGT, FNCB-CFDT, BATI-MAT-TP CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FNTF, FNSCOP BTP	Vocational education and training	All: NACE 41, 42, 43	All size classes	100
FR	Observatoire Prospectif des Métiers du BTP	MEB	FNSCBA CGT, FNCB-CFDT, BATI-MAT-TP CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FNTF, FNSCOP BTP	Employment and unemployment	All: NACE 41, 42, 43	All size classes	100
FR	OPCO Constructys	MEB	FNSCBA CGT, FNCB-CFDT, BATI-MAT-TP CFTC, CFE-CGC BTP, FO Construction	CAPEB, FFB, FDMC, FNTF, FNSCOP BTP	Vocational education and training	All: NACE 41, 42, 43	All size classes	100
HR	None							
HU	None							
IE	Construction National Joint Industrial Council (CNJIC)	MEB	SIPTU, Connect, Unite, BATU, Opatsi	CIF	n.a.	All: NACE 41, 42, 43	All size classes	55 ³³

³³ White-collar and professional workers are not covered.

Representativeness of the European social partner organisations: Construction sector

IE	Construction Workers' Pension Scheme (CWPS)	MEB	SIPTU, Connect, Unite, BATU, Opatsi	CIF	Pension fund, healthcare and provident funds	All: NACE 41, 42, 43	All size classes	65 ³⁴
IT	Formedil	MEB	Fenealuil, FILCA CISL, Fillea CGIL	ANCE, Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, AGCI Produzione e Lavoro, Anaepa, CNA Costruzioni, FIAE – Casartigiani, CLAAI, ANIEM – Confapi	Vocational education and training, occupational health activities, employment and unemployment	All: NACE 41, 42, 43	All size classes	61
IT	Paritarian National Commission for Sectoral Funds (Commissione nazionale paritetica per le Casse Edili, CNCE)	MEB	Fenealuil, FILCA CISL, Fillea CGIL	ANCE, Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, AGCI Produzione e Lavoro, Anaepa, CNA Costruzioni, FIAE – Casartigiani, CLAAI, ANIEM – Confapi	Paid holiday scheme, control and coordination activities regarding subcontracting activities, other activities	All: NACE 41, 42, 43	All size classes	61
IT	Prevedi	MEB	Fenealuil, FILCA CISL, Fillea CGIL	ANCE, Anaepa, CNA Costruzioni, FIAE – Casartigiani, CLAAI	Pension fund	All: NACE 41, 42, 43	All size classes	68
IT	Sanedil	MEB	Fenealuil, FILCA CISL, Fillea CGIL	ANCE, Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, AGCI Produzione e Lavoro, Anaepa, CNA Costruzioni, FIAE – Casartigiani, CLAAI, ANIEM – Confapi	Healthcare and provident funds	All: NACE 41, 42, 43	All size classes	71

³⁴ White-collar and professional workers are not covered.

Representativeness of the European social partner organisations: Construction sector

LT	None							
LU	None							
LV	None							
MT	None							
NL	Opleidings- en Ontwikkelingsfonds Bouw & INFRA	MEB	FNV, CNV Vakmensen	Bouwend NL, AfNL , WoningBouwersNL, Vereniging van Waterbouwers	Vocational education and training	All: NACE 41, 42, 43	All size classes	n.a.
NL	Bedrijfstak-pensioenfonds voor de Bouwnijverheid (bpfBOUW)	MEB	FNV, CNV Vakmensen , HZC	Bouwend NL, AfNL (and its member organisations), De Nederlandse Branchevereniging voor de Timmerindustrie (NBvT), NVAf, NOA, Vebidak, Vakfederatie Rietdekkers, Vereniging de Zinkmeesters	Pension fund	All: NACE 41, 42, 43	All size classes	30
PL	None							
PT	None							
RO	Builders' Social Fund (Casa Social a Constructorilor)	Statutory, set up by law in 1997	FGS Familia	FPSC	Vocational education and training, employment and unemployment, other activities	All: NACE 41, 42, 43	All size classes	n.a.
SE	Construction Sector Vocational Council (Byggbranschens Yrkesnämnd, BYN)	MSB/CSB	Byggnads, SEKO	Byggföretagen , ME	Vocational education and training	All: NACE 41, 42, 43	All size classes	n.a.

Representativeness of the European social partner organisations: Construction sector

SI	None							
SK	None							
Other non-paritarian organisations in the sector with involvement of employer organisations and companies								
FR	Union of French Funds, Temporary Leave for Construction and Public Works (Union des caisses de France – CIBTP, UCF-CIBTP)	Statutory – non-profit association	None ³⁵ (not a paritarian organisation)	CAPEB , FFB , FNTP , FNSCOP BTP	Managed the regional bad weather unemployment scheme funds and the BTP ID card			

Notes: *MEB = multi-employer sector-level collective bargaining agreement; MSB/CSB = multi-sector or cross-industry collective bargaining agreement applying to the construction sector; n.a. = not available. The green **bold** organisations are affiliated to the AEIP (see Section 3.11); the black **bold** trade unions are affiliated to the EFBWW and as such represented in the ESSDC; the blue **bold** employer organisations are those affiliated to the FIEC and as such represented in the ESSDC; the red organisations are affiliated to the EBC.*

Source: NEC

³⁵ UCF-CIBTP is not a paritarian organisation. It is included in this table because it is co-managed by multiple French employer organisations. It is a network of associations under the 1901 law, to which sectoral employer organisations and individual employers can adhere.

2.10. Fragmentation and pluralism in the construction sector

This section provides an overview of the reasons for organisational fragmentation and pluralism in the construction sector. Fragmentation occurs when different organisations cover different segments of a sector. This means that the purviews of activity of these organisations are complementary, as their membership domains do not overlap. Pluralism occurs when organisations coexist in the same domain, representing the same types of employee or employer.

In the construction sector, there is an average of 2.9 trade unions per Member State. The reasons for organisational fragmentation and pluralism on the trade union side in each country are shown in Table 41. In five countries, there are separate trade unions representing specific professions in the sector, such as engineers or painters. In seven countries, one reason for there being multiple trade unions in the sector is that they organise different categories of workers, for example blue-collar or white-collar workers. Another reason that applies to five countries is that different trade unions organise members in different parts of the sector performing different types of activity, for example one union for workers in a particular subsector of specialised construction activities, such as test drilling and boring, and another for workers in another subsector, such as plastering. In 10 countries, there is fragmentation and pluralism in the sector because different trade unions represent different ideologies. Less common reasons, applying to only two countries and one country, respectively, concern the coverage of different parts of a country in terms of geographical territory and the coverage of different types of companies (in terms of company size, ownership structure, etc.) by different unions.

Czechia, Germany, Hungary, Malta, Romania and Slovakia each register only one trade union active in the sector, meaning that fragmentation and pluralism do not occur in these countries.

Table 41: Reasons for organisational fragmentation and pluralism on the trade union side in the construction sector, 2021

Member State	Trade unions each organise only one specific profession	Trade unions organise different categories of workers	Trade unions have members in different parts of the country	Trade unions have members in different types of company (size, ownership, etc.)	Trade unions have members in different parts of the sector/ types of activity	Trade unions differ in terms of ideology
AT		X			X	
BE						X
BG			X			
CY						X
CZ	Only one trade union in the sector					
DE	Only one trade union in the sector					
DK					X	
EE	X					
EL	X				X	
ES			X			X
FI		X				
FR		X				X

Member State	Trade unions each organise only one specific profession	Trade unions organise different categories of workers	Trade unions have members in different parts of the country	Trade unions have members in different types of company (size, ownership, etc.)	Trade unions have members in different parts of the sector/ types of activity	Trade unions differ in terms of ideology
HR				X		
HU	Only one trade union in the sector					
IE	X	X				
IT						X
LT						X
LU						X
LV					X	
MT	Only one trade union in the sector					
NL		X				X
PL						X
PT	X	X				X
RO	Only one trade union in the sector					
SE	X	X				
SI					X	
SK	Only one trade union in the sector					

Notes: Elements shaded in green indicate positive answers.

Source: NEC

Fragmentation is slightly more common among employer organisations and business associations in the construction sector. In 2021, there was an average of 3.4 organisations per Member State in the sector.

Table 42 indicates that the main reason for the organisational fragmentation on the employer and business side is that the organisations have members in different parts of the construction sector or in different types of activity, often/sometimes reflecting the long value chains in the sector. This is the case in 12 Member States. Slightly less prominent in the sector is fragmentation because of different types of company (in terms of company size, business model or ownership structure), which can be found in 11 countries. Fragmentation due to regional coverage and different ideological backgrounds is rare in the sector, as is fragmentation as a result of there being different organisations for industrial relations purposes (employer organisations) and commercial purposes (business associations).

In seven countries (Bulgaria, Cyprus, Czechia, Estonia, Lithuania, Malta and Spain), there is only one employer organisation or business association active in the sector, meaning that fragmentation or pluralism is not an issue.

Table 42: Reasons for organisational fragmentation and pluralism on the employer organisation and business association side in the construction sector, 2021

Member State	Organisations have members in different parts of the country	Organisations have members in different types of company (size, ownership, etc.)	Organisations have members in different parts of the sector/types of activity	Organisations differ in terms of ideology	Other reason
AT		X	X		
BE		X	X		
BG	Only one employer organisation or business association in the sector				
CY	Only one employer organisation or business association in the sector				
CZ	Only one employer organisation or business association in the sector				
DE			X		
DK			X		
EE	Only one employer organisation or business association in the sector				
EL			X		
ES	Only one employer organisation or business association in the sector				
FI			X		
FR		X	X		
HR		X	X		
HU		X			
IE					X (a)
IT		X		X	
LT	Only one employer organisation or business association in the sector				
LU		X			
LV			X		
MT	Only one employer organisation or business association in the sector				
NL		X	X		
PL		X			
PT	X	X			X (a)
RO				X	
SE			X		
SI			X		
SK		X			

Notes: Elements shaded in green indicate positive answers. Other reasons: (a) = there are organisations representing the companies as employers in collective bargaining matters and separate organisations representing the same companies in their trade and business interests as business associations.

Source: NEC

Together, France and Germany employed more than one-third (34.7%) of the EU sectoral workforce in 2019. Employment in specialised construction activities is larger in France and Germany than in other Member States.

The sectoral situations in France and Germany are taken as examples to illustrate how the different actors fit together and how the information given in different sections of this study can be combined to create a picture of the industrial relations landscape of a given country.

2.11. Industrial relations system in the construction sector in Germany

Germany is the Member State with the most employees in the construction sector, but not with the most companies. It has one trade union and seven employer organisations in the sector. IG BAU is affiliated to the EFBWW, and the two largest employer organisations, ZDB and Bauindustrie, are affiliated to the FIEC.

In 2019, there were 2,643,029 employees in the construction sector in Germany, which was 20.8% of the EU sectoral workforce and 6.7% of all employees in Germany (Table 5). In 2020, the number was 2,633,988 employees, 20.4% of the EU workforce and 6.6% of the national workforce (Table 6).

The public works part of the sector (NACE 42 – civil engineering) employs 10.1% of the German sectoral workforce, while 8.3% is employed in the construction of buildings (NACE 41) and 81.6% of is employed in specialised construction activities (NACE 43). The average for the EU27 is 10.1% for the public works part, 30.0% for the construction of buildings and 59.9% for specialised construction activities (Table 7). The German construction sector workforce is largely employed in specialised construction activities.

There were 393,852 companies in the construction sector in Germany in 2020, which was 11.1% of all companies in the sector in the EU27. Even though Germany has the largest sectoral workforce of all Member States, there are more construction companies in France and in Italy (Table 11). Table 14 shows that in Germany 84.6% of all companies have fewer than 10 employees, which is below the EU27 average of 93.8%. In addition, 10.7% of all German construction companies have 10–19 employees, which is higher than the EU average of 3.9%, and 3.6% of German companies have 20–49 employees, higher than the EU average of 1.7% (Table 14). This explains the relatively high number of employees per company in Germany in the sector. Hochtief is the largest construction company in Germany, followed by Kaefer Isoliertechnik and Strabag (Table 16). Those three largest companies together employ about 104,000 employees, which is 5% of the entire sectoral workforce (Table 15).

Germany is one of the six Member States where there is only one sectoral trade union (Table 17). IG BAU organises all activities in the sector (Table 18), all types of workers (Table 19) and all company size groups (Table 20). IG BAU reported 231,663 trade union members, which is 12% of the sectoral workforce (Table 21). IG BAU is involved in both sectoral and company-level collective bargaining, covering all activities (Table 23) and all company size groups (Table 25). Management staff and self-employed and posted workers are generally not covered by collective bargaining in Germany (Table 24). Posted workers do, however, participate in the paid holiday scheme managed by the social fund SOKA-BAU. IG BAU is involved in the paritarian organisation SOKA-BAU. IG BAU is a member of the EFBWW and as such represented in the ESSDC.

There are seven sectoral employer organisations in Germany. Austria, Finland, Italy and Sweden are the other countries with more than five employer organisations (Table 17). All German employer organisations have regional substructures as members, but only DA also has companies directly affiliated (Table 30).

Two of the seven German sectoral employer organisations are affiliated to the FIEC: ZDB and Bauindustrie. They are the employer organisations with the largest membership strength: ZDB reported 35,000 affiliated companies, while Bauindustrie did not disclose the number of affiliated

companies. Bauindustrie organises companies in all activities in the sector (Table 27) and in all company sizes except for microfirms, which Bauindustrie does not organise (Table 28). Bauindustrie obtains most of its membership fees from larger companies with 250 employees or more. Bauindustrie addresses the needs of SMEs through a special committee for SMEs and through a yearly conference for SMEs (Mittelstandstag). ZDB obtains most of its membership fees from microfirms, with fewer than 10 employees (Table 29), and it does not organise the larger companies with 250 employees or more (Table 28). Both Bauindustrie and ZDB are involved in sectoral collective bargaining – Bauindustrie for the entire sector, but ZDB only for NACE 42 and NACE 43. Together Bauindustrie and ZDH represent companies in all types of construction activities, except demolition. ZDH and Bauindustrie, as collective bargaining organisations, jointly negotiate nationwide collective agreements on behalf of the construction industry with the trade union IG BAU; some of these agreements are declared universally applicable by the Federal Ministry of Labour and Social Affairs. Both Bauindustrie and ZDB are involved in the paritarian organisation SOKA-BAU.

The other five sectoral employer organisations, which are not affiliated to the FIEC, are all active in a specific type of specialised construction activity (NACE 43) (Table 27), and none of them represents larger companies with 250 employees or more (Table 28). ZVEH represents companies in electrical-related crafts, BV Farbe in painting activities, ZVDH in roofing, DA in demolition and ZVSHK in sanitation, heating and air conditioning.

All five of these organisations are involved in sectoral collective bargaining, although only for the specific type of activity they represent. None of these five employer organisations is affiliated to any other European association. The EBC does not have any affiliate in Germany. DA is the only one of the five that represents companies in demolition activities; those are not represented by Bauindustrie or ZDH in the ESSDC.

2.12. Industrial relations system in the construction sector in France

France is the Member State with the most companies in the sector and with the second largest sectoral workforce. In 2019, there were 1,759,286 employees in the construction sector in France, which was 13.9% of the EU's sectoral workforce and 6.7% of all employees in France (Table 5). In 2020, these numbers were 1,867,592 employees,³⁶ 14.5% of the EU's sectoral workforce and 7.0% of the national workforce (Table 6).

As in Germany, the largest proportion of the workforce in France (82.6%) is employed in specialised construction activities, significantly higher than the European average of 59.9% (Table 7 and Figure 4). In the construction of buildings subsector (NACE 41), 8.7% is employed, and 8.7% is employed in the civil engineering part of the sector (NACE 42), which covers mainly public works in France. Rather than being split by the three NACE code groups, the sector in France is broken down into five types of companies: those (1) mainly doing public works, (2) mainly doing structural works (*gros oeuvre*), (3) doing specialised construction activities (*second oeuvre*), (4) combining all types of structural works and all kinds of specialised activities and (5) doing only some kinds of structural works and one

³⁶ French social partners indicated that 2020 was an atypical year. Acknowledging this, we have included information for both 2019 and 2020.

or a few types of specialised activity, but not all of them. Alternatively, types 4 and 5 can also be considered real estate development.

Table 11 shows that there were 501,189 construction companies in France in 2020, which was 14.2% of all European construction companies, with an average of 3.7 employees per company. Table 14 shows that in France 94.5% of the 501,189 companies are microfirms (0–9 employees) and self-employed people. In addition, 3.5% of all French construction companies have 10–19 employees, 1.5% have 20–49 employees and 0.4% have between 50 and 249 employees. As a proportion of all companies, there are thus not many large and very large companies, although in terms of their workforce they have great importance. The three largest French construction companies – Bouygues, Vinci and Eiffage – are presented in Table 16. Together, these companies employ 176,078 employees, which is 11% of the sectoral workforce.

While in Germany there are more employer organisations and only one trade union, in France there are more trade unions than employer organisations in the sector.

The sector-relatedness of the six trade unions in the construction sector in France is specified for the three NACE codes in Table 18, for the different types of employee in Table 19 and for the different company size groups in Table 20. All six trade unions organise workers in all types of activities in the sector (Table 18) and in all company size groups (Table 20). Except for self-employed workers, this is also true for almost all categories of worker (Table 19); CFE-CGC BTP is the exception, not representing blue-collar workers.

Table 16 indicates that the workforce of these three largest companies is organised by five trade unions (FNCCB-CFDT, FO Construction, BATI-MATI-TP CFTC, FNCSBA CGT and CFE-CGC BTP). These are five of the six French sectoral trade unions identified in Table 18. The sixth one, which did not appear among the trade unions organising the three largest companies, is UNSA I&C. Table 21 shows the relative membership strength of each of the six French trade unions for large companies and for SMEs. There are four trade unions organisations affiliated to the EFBWW; CFE-CGC BTP and UNSA I&C are the two that are not represented by the EFBWW in the ESSDC. The four French trade unions affiliated to the EFBWW together reported around 47,876 affiliated sectoral workers. The two trade unions not affiliated to the EFBWW reported around 7,500 (see Tables 21 and 22). All together the six sectoral trade unions thus organise around 55,376 employees, which is 3% of the sectoral workforce. Of all 55,376 sectoral employees who are members of a trade union, there are thus 47,876 (86%) members of a trade union affiliated to the EFBWW and as such represented in the ESSDC. All six of the French sectoral trade unions are involved in collective bargaining. The types of employee covered by the collective bargaining they are involved in are indicated in Tables 23 and 24, while all six are involved in collective bargaining at sectoral level for companies in all size groups (as can be seen in Table 25). Except for UNSA I&C, all other trade unions also report being consulted by the French government on sector-related matters (Table 26).

This study identifies five sectoral employer organisations, of which only four are considered representative in France (Table 27). These are FNTP, CNATP³⁷ (representing employers in public works), FFB and CAPEB. SNSO only has direct companies affiliated and is not considered representative. Other business associations exist – for example, FPI (real estate development federation³⁸), which covers NACE 41, but is not considered representative. FNTP and FFB are

³⁷ See *Les origines de la CNATP*, available at <https://www.cnatp.org/la-cnatp-presentation>

³⁸ See the company website, available at <https://fpifrance.fr/>

affiliated at European level to the FIEC. CAPEB and SNSO are affiliated to the EBC, while FPI is affiliated at European level to Build Europe, but not to the FIEC or the EBC. CNATP was a member of the EBC until 2016 but was no longer affiliated at the time of this study. CNATP is representative in France and involved in collective bargaining.

CAPEB members are affiliated to its regional subunits, and the same is true of CNATP; FNTF and FFB³⁹ have both regional suborganisations and direct companies affiliated (Table 30). FNTF and FFB report organising companies in all three parts of the sector, while CAPEB and SNSO organise the construction of buildings (NACE 41) and specialised construction activities (NACE 43) but not public works (NACE 42). CNATP reports organising companies active mostly in public works (NACE 42).

SNSO is an employer organisation mainly covering NACE 43 and is not considered representative in the French industrial relations setting. It is not involved in collective bargaining but is affiliated to the European association the EBC. The other four organisations – FNTF, FFB, CNATP and CAPEB – are all representative and involved in collective bargaining (Table 33). FNTF and FFB are affiliated to the FIEC, while CAPEB is affiliated to the EBC. FNTF mainly represents French public works companies (NACE 42) but is also active in NACE 43.⁴⁰ CNATP mainly represents smaller companies active in French public works (NACE 42). The membership domains of FFB and CAPEB will be compared in more detail below, as their membership domains partly overlap.

Table 28 indicates that four of the five French employer organisations (FNTF, FFB, CNATP, SNSO) represent all company size groups. CAPEB is the only one that does not represent companies with 250 employees or more. For FNTF, the largest part of its membership fees comes from the largest companies with 250 employees or more; for FFB and SNSO, the largest part of their fees comes from companies with between 10 and 249 employees, while for CAPEB it comes mostly from microfirms with fewer than 11 employees (Table 29).⁴¹ Details of the membership strength for the different company size groups are given in Tables 31 and 32.

Table 43 indicates pluralism in the sectoral industrial relations system in France. Altogether, CAPEB brings together 57,126 affiliated companies and FFB 44,218. In terms of the workforce of all the affiliated companies, the totals are 642,853 for FFB and 186,454 for CAPEB.

FFB organises 150 of the largest construction companies, with 250 employees or more, while CAPEB does not organise any of the companies in the largest size group. Regarding companies with 11 employees or more,⁴¹ FFB has 30% of these companies affiliated, while CAPEB has only 5%. Of the companies with between 50 and 249 employees, FFB has 17 times more affiliated companies than CAPEB, and in the company size group between 11 and 49 employees it has 4 times more affiliated companies. However, among microfirms with 10 employees or fewer, CAPEB has 54,042 affiliated companies with a workforce of 125,336 employees, while FFB has 31,079 affiliated companies with a

³⁹ FFB member companies are affiliated through local federations (*fédérations départementales*) and pay a subscription split into two parts (local and national).

⁴⁰ While NACE 42 obviously concerns public works companies, FNTF members also share NACE 43 with the building trade, a large part of which is the finishing work of their profession, and the representativeness of public works cannot be reduced to only NACE 42. Furthermore, the vast majority of companies in the sector are small businesses (68% are companies with 10 employees or fewer). FNTF is therefore not 'mainly' representative of companies with 250 employees or more.

⁴¹ The microfirm category is defined in France as companies with 0 to 10 employees, including companies with 10 employees. In other EU Member States, the microfirm category is defined as companies with 0 to 9 employees, excluding companies with 10 employees.

workforce of 121,000 employees. CAPEB has almost double the number of affiliated microfirms FFB has, while in terms of the estimated workforce the difference is insignificant. This indicates that, within the microfirms group, CAPEB's membership strength lies most with the smaller microfirms, and FFB's more with the larger microfirms. A final distinction can be made between the microfirms with employees and the self-employed workers without employees. Table 43 indicates that in both subcategories of microfirms CAPEB has greater membership strength. The organisation with the highest membership strength in each company size group is marked in green in Table 43.

It must be noted that in most other Member States companies with exactly 10 employees are not included in the microfirms category, while in France microfirms are those with 10 employees or fewer. When it comes to microfirms without employees, these are in fact self-employed people, for whom no collective bargaining takes place because they do not have any employees. The trade unions in France have most of their membership strength in the larger companies, and much less proportionally in the microfirms.

Table 43: Membership strength of FFB and CAPEB in different company size groups

	FFB			CAPEB		
	Number of companies	%	Workforce	Number of companies	%	Workforce
All together	44,218	100	642,853	57,126	100	186,454
>250 employees	130	0.3	40,000	0		
50–249 employees	1,200	2.7	185,000	71	0.1	5,381
11–49 employees	11,789	27	296,461	3,013	5	55,737
10 employees or fewer	31,079	70	121,000	54,042	95	125,336
Different types of microfirms						
Fewer than 10 with employees (1-10 employees)	27,342	57	121,000	36,042	63	125,336
Self-employed without employees (0 employees)	3,737	14		18,000	31.5	
Affiliation at cross-industry level in France	CPME		MEDEF	U2P (affiliated to SMEunited)		
Affiliation at EU level	FIEC			EBC		

Notes: The organisation with the highest membership strength in each company size group is marked green in the table. The numbers refer to the last official count in December 2019, which was published by the High Council for Social Dialogue in 2021. In 2024, a new official count will be conducted, which can be expected to be published in 2025.

Sources: FFB and CAPEB

As is common in industrial relations, the setting in the French industrial relations system combines levels of cooperation with areas of conflict. The cooperation can be seen in the five bipartite social dialogue structures in Table 39 and in the five paritarian organisations in Table 40. All the organisations are constructively cooperating in those social dialogue structures and paritarian organisations, including FFB, FNTF and CAPEB. There are currently four types of sectoral collective bargaining agreements for the construction of buildings (NACE 41) and specialised construction activities (NACE 43), and three collective agreements for public works (NACE 42) (Table 44). There is

some tension between FFB and CAPEB when it comes to the role of these organisations in collective bargaining for companies up to 10 employees and companies with more than 10 employees. According to the EBC, this French industrial relations context limits the collaboration between the FIEC and the EBC at European level, particularly in the context of European sectoral social dialogue.

Table 44: Types of collective bargaining agreements in the construction sector in France

Part of the sector	Type of workers	Company size (number of workers)	Date	Workers covered
Construction of buildings (NACE 41) and specialised construction activities (NACE 43)	Blue-collar	10 or fewer	8 October 1990	306,693
	Blue-collar	More than 10	8 October 1990	491,181
	Employees, technicians and master builders	All	12 July 2006	183,507
	Managers and engineers	All	1 June 2004	97,844
Public works (NACE 42)	Blue-collar	All	15 December 1992	169,521
	Employees, technicians and master builders	All	12 July 2006	87,876
	Managers and engineers	All	20 November 2015	57,125

Source: NEC

In the French industrial relations system, the *mesures d'audience* (audience measurement) determines the representativeness of each employer organisation in terms of the collective workforce of the companies affiliated to it. Consequently, the employer organisation that gathers at least 50% of the workers in all affiliated companies has a kind of veto right in collective bargaining negotiations.

Finally, another layer in the French construction sector industrial landscape is the suborganisations of the recognised employer organisations; as suborganisations, they are not recognised as industrial relations actors. For example, in FFB, there is FNSCOP BTP,⁴² which is a kind of network of SMEs within FFB. These organisations are not industrial relations actors, but they do add indirectly to the membership domains and representativeness of the organisations of which they are part.

⁴² See the FFB website, available at <https://www.ffbatiment.fr/organisation-ffb/unions-syndicats-metier/scop-btp>

3. European level of interest representation

This chapter presents detailed data on the representativeness of the two European-level social partners in the construction sector: the EFBWW on the employees' side and the FIEC on the employers' side. Both the EFBWW and the FIEC are listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU.

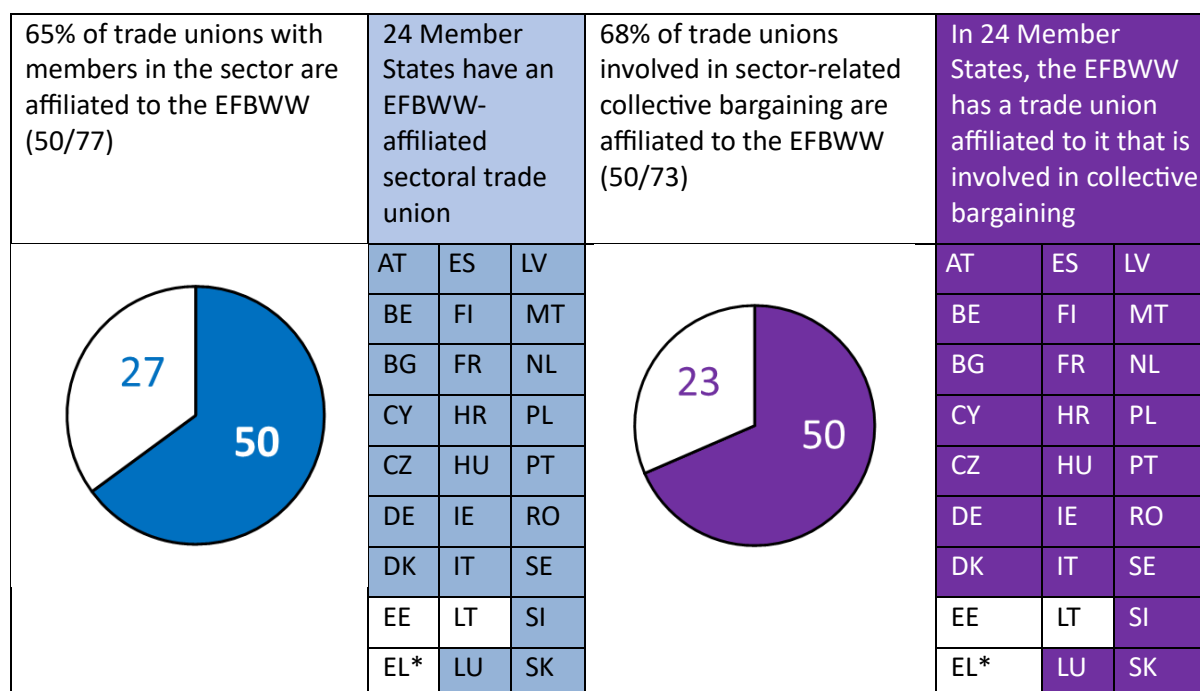
The representativeness of the social partners is assessed in three ways. First, the membership domain and strength of both the EFBWW and the FIEC, and to some extent also those of the EBC, are discussed based on the collective coverage of their national affiliates. As Chapter 1 highlighted the importance of microfirms and SMEs in the construction sector, representativeness for these companies is also focused on. Second, the European social partners' capacity to negotiate is analysed – this is their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide. This capacity to negotiate is affected by the involvement of their affiliates in collective bargaining at national level, which ensures not only that they can provide an effective mandate for discussion and negotiation at European level, but also that they have indicated that they have the capacity to implement European-level agreements. Finally, the limits of the representativeness of social partners involved in the ESSDC for the construction sector are assessed through comparison with the representativeness of other European associations and the national organisations not represented by the EFBWW or the FIEC.

In the previous chapter, the sector-relatedness of the trade unions affiliated to the EFBWW and of all other sectoral trade unions was described in Tables 18–20, their membership strength in Table 21, their involvement in collective bargaining in Tables 23–25 and their involvement in social dialogue, paritarian organisations and consultation practices in Table 26. The sector-relatedness of the employer organisations/business associations affiliated to the FIEC, and all other sectoral employer organisations/business associations, can be found in Tables 27–29, their membership strength in Tables 31 and 32, their involvement in collective bargaining in Tables 33 and 34 and their involvement in social dialogue, paritarian organisations and consultation practices in Table 35. In this chapter, the representativeness of the EFBWW and the FIEC is analysed, and so is that of the national organisations not represented by them and the other European organisations with some representativeness in the construction sector.

3.1. Membership domain of the EFBWW

The EFBWW is affiliated to the European Trade Union Confederation (ETUC). It organises national workers' organisations (trade unions) from the entire construction industry, the building materials industry, the wood and furniture industry and the forestry industry. Since its membership domain covers more sectors than the construction sector, it overlaps with the construction sector as defined in this report (see Figure 3).

Figure 17: Scoreboard of the representativeness of the EFBWW in the construction sector



* The EFBWW has a member organisation in Greece, but no information from it was provided for this study.

Sources: Tables 18, 23 and 24

Figure 17 indicates that, of the 77 trade unions identified in the study, 50 (65%) are affiliated to the EFBWW. Of the 27 Member States where a sector-related trade union was found, the EFBWW has an affiliate in 24 Member States (89%). The three Member States where the EFBWW does not register any sector-related affiliates are Estonia and Lithuania. The Greek Federation of Workers and Employees in Cement Industry is a member of the EFBWW. It can be assumed that this organisation has members in the construction sector, although this could not be confirmed within the scope of this study. Table 45 lists for each Member State the sectoral trade unions that are affiliated to the EFBWW, those that are not affiliated and whether the trade union with the most members in the sector is affiliated. It shows that in 21 countries an EFBWW affiliate is the most important trade union in the sector in terms of membership (in France, the situation is not completely clear; however, the most important trade unions among large companies and SMEs are both affiliated to the EFBWW). For Cyprus, Latvia and Portugal, there are trade unions affiliated to the EFBWW, although not the ones with the most members in the sector. Of the 21 countries with a pluralist associational system in the sector on the trade union side (where there is more than just one trade union), in eight (Belgium, Bulgaria, Croatia, Denmark, Italy, Luxembourg, Poland and Spain) all unions representing workers in the construction sector are affiliated to the EFBWW. In the pluralist systems of Estonia, Greece and Lithuania, none of the trade unions is affiliated to the EFBWW.

Table 45: Affiliation of sector-related trade unions to the EFBWW, 2021

Member State	Trade unions affiliated to the EFBWW for their construction sector workers	Trade unions not affiliated to the EFBWW	Is the trade union with the most members in the sector affiliated to the EFBWW?
EU27	50 affiliated trade unions 24 Member States Not in EE, EL, LT	27 unaffiliated trade unions 13 Member States	Largest trade union in 21 Member States Not in CY, LV, PT

Member State	Trade unions affiliated to the EFBWW for their construction sector workers	Trade unions not affiliated to the EFBWW	Is the trade union with the most members in the sector affiliated to the EFBWW?
AT	GBH	GPA, PRO-GE	Yes
BE	ABVV-FGTB ACCG, ACLVB-CGSLB, ACV-CSC BIE	ACV-Puls ⁴³	Yes
BG	FITUC, FCIW		Yes
CY	OOIM-SEK	Oikodomoi-PEO, Semmik-PEO, OBIEK-SEK	No
CZ	OS Stavba		Yes
DE	IG BAU		Yes
DK	3F, Dansk Metal, DEF, Blik&Rør, MFD		Yes
EE		ETTA, EEAÜL	No
EL	Omsim⁴⁴	OOSSE, OHMEE, OHE	No
ES	CCOO del Hábitat, ELA – Industria eta Eraikuntza, UGT FICA		Yes
FI	RL, Pro	YTN, JHL, FEWU	Yes
FR	FNCB-CFDT, FO Construction, BATI-MAT-TP CFTC, FNSCBA CGT	CFE-CGC BTP, UNSA I&C	Yes
HR	SGH, NCS		Yes
HU	ÉFÉDOSZSZ		Yes
IE	SIPTU, Unite, Connect	BATU, Opatsi	Yes
IT	Fillea CGIL, FILCA CISL, Fenealuil		Yes
LT		LPPSF, SPS	No
LU	SBABCM-OGBL, LCGB-CA		Yes
LV	LBNA	LCDA	No
MT	GWU		Yes
NL	FNV, CNV Vakmensen	LBV	Yes
PL	SBiPD NSZZ Solidarność, ZZ Budowlani		Yes
PT	Setaccop	Feviccom, SQTD, Fetese, Fentcop	No
RO	FGS Familia		Yes
SE	Målarna, Byggnads , Ledarna, Unionen, SEKO, Elektrikerna	Sveriges Ingenjörer	Yes
SI	SDGD	SCGS	Yes
SK	IOZ		Yes

Notes: Trade unions in **bold** are the most important in terms of membership among large companies and/or SMEs in a country.

Source: NEC

⁴³ ACV Puls transferred its members to ACV-CSC BIE and no longer has members in the construction sector.

⁴⁴ The Greek Federation of Workers and Employees in Cement Industry is a member of the EFBWW. It can be assumed that this organisation has members in the construction sector, although this could not be confirmed within the scope of this study.

In terms of sector-relatedness, the EFBWW through its member trade unions covers at least part of all subsectors in construction in all 24 countries where it has affiliates, except for Malta. Table 46 indicates the cumulative sector coverage of EFBWW member trade unions – that is, the coverage of all EFBWW members combined per country. In countries with only one affiliate, the cumulative coverage corresponds to the coverage of this single EFBWW member organisation. Table 46 displays the cumulative membership domain of all member trade unions relative to the construction sector. The cumulative membership domain patterns of the EFBWW affiliates in almost all countries are either overlap or sectional overlap. For some countries, the situation is not completely clear, since the accumulation of the sectional overlaps of several organisations does not necessarily lead to full coverage of the sector. Nevertheless, the table suggests that through its members the EFBWW covers (almost) the entire construction sector in all Member States with EFBWW affiliates, except for Malta.

Table 46: Cumulative sector coverage of EFBWW member trade unions per country, 2021

Member State	Trade unions affiliated to the EFBWW for their construction sector workers	Member trade unions together cover:			Membership domain of all member trade unions relative to the sector
		At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	
EU27	50 affiliated trade unions 24 Member States Not in EE, EL, LT	49 trade unions 23 Member States Not in MT	49 trade unions 23 Member States Not in MT	50 trade unions 24 Member States	Mostly O and SO
AT	GBH	Yes	Yes	Yes	SO
BE	ABVV-FGTB ACCG, ACLVB-CGSLB, ACV-CSC BIE	Yes	Yes	Yes	O
BG	FITUC, FCIW	Yes	Yes	Yes	SO
CY	OOIM-SEK	Yes	Yes	Yes	SO
CZ	OS Stavba	Yes	Yes	Yes	SO
DE	IG BAU	Yes	Yes	Yes	O
DK	3F, Dansk Metal, DEF, Blik&Rør, MFD	Yes	Yes	Yes	SO or O
EE	None				
EL	None				
ES	CCOO del Hábitat, ELA – Industria eta Eraikuntza, UGT FICA	Yes	Yes	Yes	O
FI	RL, Pro	Yes	Yes	Yes	SO or O
FR	FNCB-CFDT, FO Construction, BATI-MAT- TP CFTC, FNSCBA CGT	Yes	Yes	Yes	O
HR	SGH, NCS	Yes	Yes	Yes	O
HU	ÉFÉDOSZSZ	Yes	Yes	Yes	O
IE	SIPTU, Unite, Connect	Yes	Yes	Yes	SO or O
IT	Fillea CGIL, FILCA CISL, Fenealuil	Yes	Yes	Yes	SO or O
LT	None				
LU	SBABCM-OGBL, LCGB-CA	Yes	Yes	Yes	O

Member State	Trade unions affiliated to the EFBWW for their construction sector workers	Member trade unions together cover:			Membership domain of all member trade unions relative to the sector
		At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	
LV	LBNA	Yes	Yes	Yes	O
MT	GWU	No	No	Yes	SO
NL	FNV, CNV Vakmensen	Yes	Yes	Yes	O
PL	SBiPD NSZZ Solidarność, ZZ Budowlani	Yes	Yes	Yes	O
PT	Setaccop	Yes	Yes	Yes	SO
RO	FGS Familia	Yes	Yes	Yes	SO
SE	Målarna, Byggnads, Ledarna, Unionen, SEKO, Elektrikerna	Yes	Yes	Yes	SO or O
SI	SDGD	Yes	Yes	Yes	C
SK	IOZ	Yes	Yes	Yes	SO

Notes: Membership domain patterns relative to the construction sector: C = congruence, O = overlap, SO = sectional overlap.

Source: NEC

Table 47 gives an overview of the cumulative coverage in terms of company size classes of EFBWW member trade unions per country. Again, in countries with just one affiliate the cumulative coverage corresponds to the coverage of this single member trade union. This table indicates that EFBWW member unions represent employees that work in all company size classes in most Member States. Where this is not the case, particular size classes do not exist (large companies in Cyprus) or unionisation in very small and microcompanies is impeded (by legislation) (Poland, Romania, Slovakia).

Table 47: Cumulative coverage in terms of company size of EFBWW member trade unions per country, 2021

Member State	Trade unions affiliated to the EFBWW for their construction sector workers	1–9 employees	10–49 employees	50–249 employees	250+ employees
EU27	50 affiliated trade unions 24 Member States Not in EE, EL, LT	21 MSs	22 MSs	24 MSs	23 MSs
AT	GBH	Yes	Yes	Yes	Yes
BE	ABVV-FGTB ACCG, ACLVB-CGSLB, ACV-CSC BIE	Yes	Yes	Yes	Yes
BG	FITUC, FCIW	Yes	Yes	Yes	Yes
CY	OOIM-SEK	Yes	Yes	Yes	No ⁴⁵
CZ	OS Stavba	Yes	Yes	Yes	Yes
DE	IG BAU	Yes	Yes	Yes	Yes
DK	3F, Dansk Metal, DEF, Blik&Rør, MFD	Yes	Yes	Yes	Yes
EE	None				
EL	None				

⁴⁵ In Cyprus, there are no companies in the sector with 250 employees or more.

ES	CCOO del Hábitat, ELA – Industria eta Eraikuntza, UGT FICA	Yes	Yes	Yes	Yes
FI	RL, Pro	Yes	Yes	Yes	Yes
FR	FNCB-CFDT, FO Construction, BATI-MAT-TP CFTC, FNSCBA CGT	Yes	Yes	Yes	Yes
HR	SGH, NCS	Yes	Yes	Yes	Yes
HU	ÉFÉDOSZSZ	Yes	Yes	Yes	Yes
IE	SIPTU, Unite, Connect	Yes	Yes	Yes	Yes
IT	Fillea CGIL, FILCA CISL, Fenealuil	Yes	Yes	Yes	Yes
LT	None				
LU	SBABCM-OGBL, LCGB-CA	Yes	Yes	Yes	Yes
LV	LBNA	Yes	Yes	Yes	Yes
MT	GWU	Yes	Yes	Yes	Yes
NL	FNV, CNV Vakmensen	Yes	Yes	Yes	Yes
PL	SBiPD NSZZ Solidarność, ZZ Budowlani	No	No	Yes	Yes
PT	Setaccop	Yes	Yes	Yes	Yes
RO	FGS Familia	No	Yes	Yes	Yes
SE	Målarerna, Byggnads, Ledarna, Unionen, SEKO, Elektrikerna	Yes	Yes	Yes	Yes
SI	SDGD	Yes	Yes	Yes	Yes
SK	IOZ	No	No	Yes	Yes

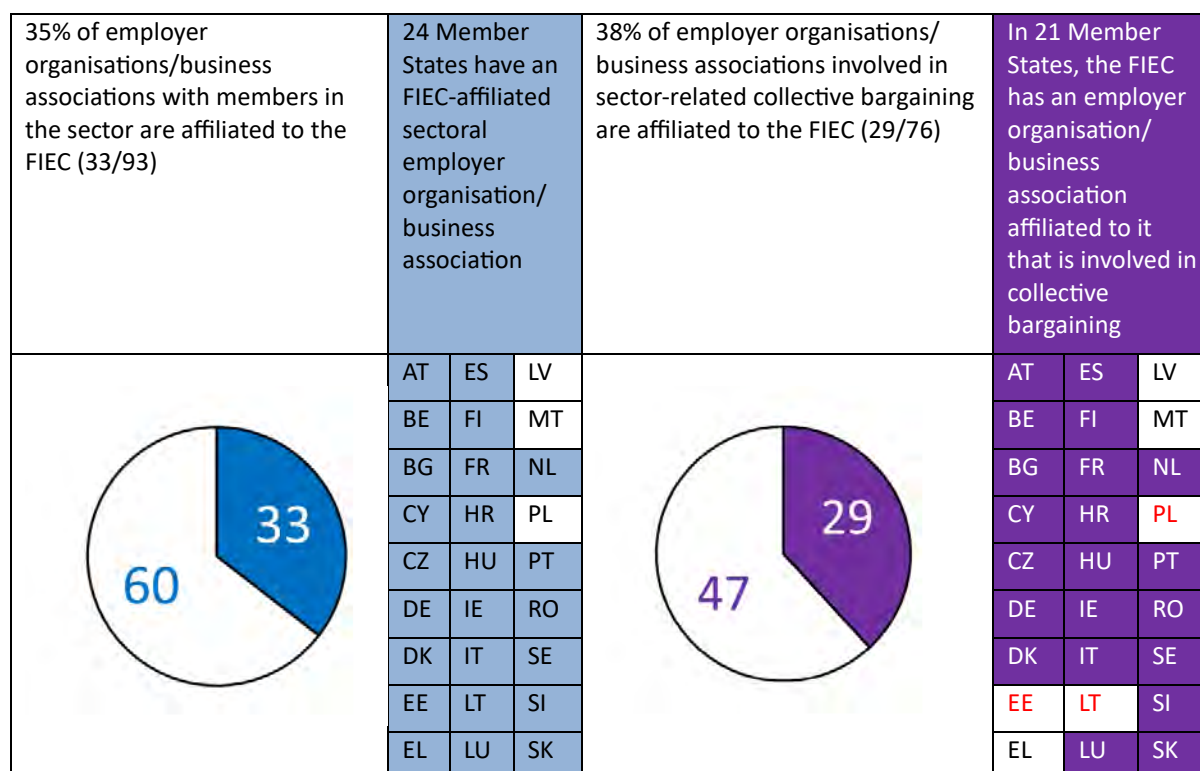
Source: NEC

3.2. Membership domain of the FIEC

The FIEC represents European construction enterprises, irrespective of their size and specific business activities. Its membership domain is thus largely congruent relative to the construction sector as defined for the purpose of this study.

The FIEC is a partner organisation of the European Committee for Standardization and a member/associate member of the European Council for Construction Research, Development and Innovation, the European Construction Technology Platform, the Enterprise Europe Network run by the European Commission, the European Services Forum, the European Housing Forum and WorldSkills Europe.

Figure 18: Scoreboard of the representativeness of the FIEC in the construction sector



Notes: Red font indicates countries in which none of the employer organisations/business organisations are involved in collective bargaining.

Sources: Tables 27, 33 and 34

The sector-relatedness, in terms of the national member organisations' coverage of the three NACE codes 41, 42 and 43, can be found in Table 27, where all the national employer organisations are listed and the FIEC members are in grey and bold. At the top of Table 27, the totals are given for all employer organisations in the sector, followed by the totals for the FIEC member organisations (grey and bold). Tables 28 and 29 do the same for the different company size groups, and Tables 31 and 32 do so for the membership strength of the national member organisations. All of this is summarised in Figure 18 on the left in blue, indicating that 35% of all sectoral employer organisations/business associations are affiliated to the FIEC, covering 24 Member States. On the right, the information regarding the employer organisations involved in collective bargaining is presented in purple. Details of collective bargaining involvement can be found in Tables 33 and 34. Details of involvement in national sectoral social dialogue structures, paritarian organisations and consultations by governments are given in Table 35.

Table 48 lists the sectoral employer organisations and business associations that are affiliated to the FIEC (in the second column) and those that are not affiliated (in the third column). In the last two columns, Table 48 indicates whether the organisations with the most member companies are affiliated and whether the organisations affiliated to the FIEC organise one of the three largest companies in the sector (more details on the three largest companies in the sector can be found in Table 16). The information for all national organisations – those affiliated to the FIEC and those not affiliated – with their relative importance among large companies and among SMEs, can be found in Table 32.

Of the 93 sector-related employer organisations and business associations, 33 are affiliated to the FIEC – either directly or indirectly through a higher-order or lower-order unit (Table 48). FIEC members can be found in all Member States except Malta, Latvia and Poland. LBP of Latvia was a member of the FIEC until the end of 2021; it is, however, no longer affiliated. In all 24 countries where the FIEC has member organisations, it has among its affiliates the most important employer organisation or business association in terms of membership. FPSC from Romania joined the FIEC in January 2022. In Germany, either Bauindustrie or ZDB is the largest organisation; however, since both are affiliated to the FIEC, the FIEC represents the most important organisation anyhow. In addition, Table 48 contains information on the affiliation(s) of one or more of the three largest employers (in terms of workforce) to an employer organisation or business association that is in turn affiliated to the FIEC. The table indicates that the FIEC represents, through its national organisational members, one or more of the three largest employers in 23 countries where it has members.

Overall, the information provided in Table 48 indicates that the FIEC represents the most important sector-related employer organisations and business associations in the EU27, as well as the largest employers in most countries, which are in turn members of the FIEC affiliates in these countries.

Table 48: Affiliation of sector-related employer organisations and business associations to the FIEC,* 2021

Member State	Employer organisations/ business associations affiliated to the FIEC	Employer organisations/ business associations not affiliated to the FIEC	Is the most important employer organisation/business association in terms of membership affiliated to the FIEC?	Is one of the three largest employers in the sector a member of an affiliated employer organisation/business association?***
EU27	33 of 93 employer organisations/business associations affiliated 24 Member States Not in LV, MT, PL	60 of 93 employer organisations/business associations not affiliated 21 Member States	Yes in 24 Member States	Yes in 23 Member States
AT	BIB , FVBI	BIBHG, BIDGS, BIHPFK, BIHB, BIMT, BITHG, FEEI, Biegak, BIM, BISHL	Yes	Yes
BE	Embuild	FEMA, Bouwunie ^{SME}	Yes	Yes
BG	BCC		Yes	Yes
CY	OSEOK		Yes	Yes
CZ	SPS		Yes	Yes
DE	Bauindustrie , ⁴⁶ ZDB	ZVDH, BV Farbe, ZVEH, DA, ZVSHK	Yes	(Yes)
DK	DI Byggeri	Tekniq	Yes	Yes
EE	EEEL		Yes	Yes
EL	Pedmede	SATE, POSEH	Yes	Yes
ES	CNC		Yes	(Yes)
FI	INFRA, RT , LVI TU, GCF	Palta, STTA, TAFFEMC, MTA	Yes	Yes
FR	FNTP, FFB	CAPEB, ^{SME} SNSO, CNATP	Yes	Yes
HR	HUP-UPG	HOK	Yes	Yes

⁴⁶ Bauindustrie used to be called HDB (<https://www.bauindustrie.de/verband>). This change of name took place in 2023.

Member State	Employer organisations/ business associations affiliated to the FIEC	Employer organisations/ business associations not affiliated to the FIEC	Is the most important employer organisation/business association in terms of membership affiliated to the FIEC?	Is one of the three largest employers in the sector a member of an affiliated employer organisation/business association?***
HU	ÉVOSZ	IPOSZ ^{SME}	Yes	Yes
IE	CIF	NGMC ^{SME}	Yes	Yes
IT	ANCE	Anaepa, Legacoop Produzione e Servizi, Confcooperative – Lavoro e Servizi, AGCI – Produzione e Lavoro, CNA Costruzioni, FIAE – Casartigiani, CLAAI, ANIEM – Confapi	Yes	Yes
LT	LSA		Yes	Yes
LU	GEBTP	FDA ^{SME}	Yes	Yes
LV	LBP (until the end of 2021)	LBA , LCBB, LBP (since 2022)	Until the end of 2021	Until the end of 2021
MT		MEA	No	No
NL	Bouwend NL	AfNL, Techniek Nederland, OnderhoudNL	Yes	Yes
PL		PZPB , ZRP, ^{SME} KBiN	No	No
PT	Fepicop , Aecops, AICCOPN	AICE	Yes	Yes
RO	ARACO, ^{SME} FPSC	Zepher Cluster, UNPR	Yes	Yes
SE	Byggföretagen	MiS, P&V, IN, ME, GBF	Yes	Yes
SI	GZS – CCBMIS	ZDS, OZS ^{SME}	Yes	No
SK	ZSPS	SZZ ^{SME}	Yes	Yes

* Including indirect FIEC members (affiliations through higher-order or lower-order units); ** parentheses mean indirect affiliation through higher-order unit; ^{SME} indicates that the organisation is the most important in terms of membership among SMEs in the sector in the country.

Notes: n.a. = not available; Organisations in **bold** are the most important in terms of membership in the sector per country.

Source: NEC

In terms of cumulative sector coverage – that is, the coverage relative to the construction sector (and its subsectors) of all FIEC members per country altogether – the FIEC, through its member organisations, covers all subsectors in construction in all 24 countries where it has affiliates (Table 49). In countries with only one affiliate, which is the case in 18 Member States, the cumulative coverage corresponds to the coverage of the only existing FIEC member organisation. Table 49 also shows the cumulative membership domain of all member organisations per country relative to the construction sector. The cumulative membership domain patterns of FIEC affiliates are sectionalism in nine countries and sectional overlap in three countries. This means that, although all subsectors are at least partially covered, there is in all these cases nevertheless an area of business activity (or a particular type of company) not covered. Congruence is the second most frequent cumulative membership domain pattern of the FIEC, with six cases, followed by overlap, with four cases. The

organisations with a congruent or overlapping membership domain cover the entire sector in all its aspects.

Based on the information available in Table 31, there are 228,048 companies affiliated to national employer organisations that are members of the FIEC; this is 39.2% of all organised companies in the sector in the EU27. Table 49 presents the cumulative sector coverage of the FIEC members based on the information listed in Tables 27, 28 and 31: Table 27 provides values for each NACE code as a proportion of all 93 national sectoral employers' organisations, Table 28 gives these proportions for the different company size groups and Table 31 gives those for membership strength of the national organisations affiliated to the FIEC.

Table 49: Cumulative sector coverage of FIEC member organisations per country, 2021

Member State	Employer organisations/ business associations affiliated to the FIEC	Member organisations together cover:			Membership domain of all member employer organisations/ business associations relative to the sector
		At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	
EU27	33 of all 93 EOs/BAs affiliated 24 MSs Not in LV, MT, PL	30 EOs/BAs 48% of 63 24 MSs	31 EOs/BAs 48% of 64 24 MSs	32 EOs/BAs 36% of 89 24 MSs	
AT	BIB, FVBI	Yes	Yes	Yes	S
BE	Embuild	Yes	Yes	Yes	C
BG	BCC	Yes	Yes	Yes	S
CY	OSEOK	Yes	Yes	Yes	S
CZ	SPS	Yes	Yes	Yes	C
DE	Bauindustrie, ⁴⁷ ZDB	Yes	Yes	Yes	S
DK	DI Byggeri	Yes	Yes	Yes	S
EE	EEEL	Yes	Yes	Yes	SO
EL	Pedmede	Yes	Yes	Yes	SO
ES	CNC	Yes	Yes	Yes	C
FI	INFRA, RT, LVI TU, GCF	Yes	Yes	Yes	O
FR	FNTP, FFB	Yes	Yes	Yes	C
HR	HUP-UPG	Yes	Yes	Yes	O
HU	ÉVOSZ	Yes	Yes	Yes	O
IE	CIF	Yes	Yes	Yes	S
IT	ANCE	Yes	Yes	Yes	S
LT	LSA	Yes	Yes	Yes	O
LU	GEBTP	Yes	Yes	Yes	C
LV	LBP	Yes	Yes	Yes	∅
MT	None				
NL	Bouwend NL	Yes	Yes	Yes	C
PL	None				
PT	Fepicop, Aecops, AICCOPN	Yes	Yes	Yes	O

⁴⁷ Bauindustrie used to be called HDB (before 2023).

Member State	Employer organisations/ business associations affiliated to the FIEC	Member organisations together cover:			Membership domain of all member employer organisations/ business associations relative to the sector
		At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	
RO	ARACO, FPSC	Yes	Yes	Yes	O
SE	Byggföretagen	Yes	Yes	Yes	S
SI	GZS – CCBMIS	Yes	Yes	Yes	SO
SK	ZSPS	Yes	Yes	Yes	S

Notes: Membership domain patterns relative to the construction sector: C = congruence, O = overlap, S = sectionalism, SO = sectional overlap. LBP from Latvia is struck through because it was affiliated to the FIEC until the end of 2021, when the data for this study were collected. Since the beginning of 2022, it has not been a member of the FIEC.

Source: NEC

Table 50 gives an overview of FIEC affiliates' coverage and relative strength in terms of company size classes. FIEC members represent enterprises in all company size classes in almost all Member States, although in some countries no membership data (disaggregated by company size class) are available. In Cyprus, there are very few (0.1%) large enterprises with a workforce of 250 employees or more, meaning that OSEOK de facto does not represent them. In Slovenia, the FIEC member organisation does not represent microcompanies. In all other countries with FIEC affiliates, all company size classes are represented by FIEC members. Given the large numbers of companies in Austria, France, Greece and Italy, a membership strength of 0% for a company size class does not mean that the size class is not represented at all; however, a proportion of approximately 0% does indicate that the vast majority of members are enterprises in other size classes. Just under half of the FIEC affiliates with data available (9 out of 22 organisations) have most of their members among microcompanies with fewer than 10 employees. The rest (13 out of 22 organisations) mainly organise SMEs with 10–249 employees. In addition, 10 of the 21 FIEC members with data available receive the largest proportion of membership fees from large companies with 250 and more employees, which underscores the relative importance of large companies for many FIEC affiliates.

Of the 33 organisations affiliated to the FIEC, 27 provided detailed information on their membership strength (in terms of % covered) in the different company size groups. A total of 21 affiliated organisations did this both in terms of the companies (column 3 in Table 50) and in terms of the predominance of the membership fee contributions (column 4 in Table 50). Only 12 affiliated organisations did not provide detailed information; they did however indicate, with a response of yes or no, whether they do have member companies in the given company size group, which is also shown in Table 50.

Only singling out one aspect of the information could be misleading, as it may be that most of the companies affiliated are smaller companies, while most of the membership fees come from the larger ones. This is illustrated by FNTP, which has 73% microfirms affiliated, 25% companies with between 10 and 249 employees and only 2% companies with 250 employees or more, while most membership fees come from that last group of larger companies (see Table 31 for the absolute numbers and Table 50 for the percentages).

The FIEC has member organisations for which two-thirds or more of the affiliated companies are microfirms and companies with fewer than 50 employees in 13 Member States: Austria, Belgium, Bulgaria, Cyprus, Denmark, Finland, France, Greece, Ireland, Italy, Portugal, Romania and Sweden. In addition, in Croatia, Czechia, Hungary, and Slovakia there are significant shares of microfirms and smaller companies represented by FIEC member organisations, even if these proportions are much smaller than the proportions among all companies in the sector (Tables 13 and 14). Tables 13 and 14 in Chapter 1 indicate the importance of these microfirms and SMEs in terms of numbers of companies and workforce size for the entire sector (Table 14) and for the different activities (NACE codes; Table 13).

Only in Slovenia is the FIEC member reported not to represent microfirms with fewer than 10 employees. In all other Member States where the FIEC has an affiliated employer organisation, there is an affiliate with member companies in all company size groups.

Table 50: FIEC member organisations' coverage and relative strength in terms of company size classes, and importance of company size classes for contributing membership fees, 2021

Member State	Employer organisations/ business associations affiliated to the FIEC	Membership strength in each of the company size groups, by number of employees				Company size group(s) contributing the largest proportion of membership fees		
		1–9	10–49	50–249	250+	250+	10–249	0–9
All 33 FIEC members together organise 228,048 companies⁴⁸		151,640 76%	39,152 20%	6,764 3.4%	1,055 0.5%			
EU27 93 employer organisations/ business associations		81	82	75	63	At least 13	At least 23	At least 24
33 FIEC members 24 Member States		31 38% 23 Member States	33 40% 24 Member States	33 44% 24 Member States	31 49% 23 Member States	10	9	3
AT	BIB	88%	9%	2%	0%	n.a.	n.a.	n.a.
AT	FVBI	35%	9%	26%	30%	n.a.	n.a.	n.a.
BE	Embuild	83%	14%	2.5%	0.4%	n.a.	n.a.	n.a.
BG	BCC	49%	38%	12%	1%	No	Yes	No
CY	OSEOK	50%	49%	1%	0%	No	Yes	No
CZ	SPS	24%	36%	31%	9%	Yes	Yes	No
DE	Bauindustrie	No	Yes	Yes	Yes	Yes	No	No
DE	ZDB	Yes	Yes	Yes	No	No	No	Yes
DK	DI Byggeri	72%	24%	4%	1%	No	Yes	No
EE	EEEL	Yes	Yes	Yes	Yes	n.a.	n.a.	n.a.
EL	Pedmede	81%	16%	2%	0.2%	No	No	Yes
ES	CNC	Yes	Yes	Yes	Yes	n.a.	n.a.	n.a.
FI	INFRA	Yes	Yes	Yes	Yes	n.a.	n.a.	n.a.
FI	RT	28%	54%	17%	1%	n.a.	n.a.	n.a.
FI	LVI TU	40%	52%	7%	1%	Yes	No	No
FI	GCF	24%	52%	20%	4%	Yes	No	No

⁴⁸ For 198,611 companies, there is information on the different company size groups; therefore, 198,611 corresponds to 100%.

FR	FNTP	67%	25%	6%	2%	Yes	No	No
FR	FFB	70%	27%	3%	0.3%	No	Yes	No
HR	HUP-UPG	10%	15%	62.5%	12.5%	No	Yes	No
HU	ÉVOSZ	25%	32%	35%	8%	Yes	No	No
IE	CIF	33%	33%	31%	2%	Yes	No	No
IT	ANCE	89%	10%	1%	0%	No	No	Yes
LT	LSA	Yes	Yes	Yes	Yes	n.a.	n.a.	n.a.
LU	GEBTP	Yes	Yes	Yes	Yes	n.a.	n.a.	n.a.
LV	LBP	Yes	Yes	Yes	Yes	No	Yes	No
MT	None							
NL	Bouwend NL	Yes	Yes	Yes	Yes	No	Yes	No
PL	None							
PT	Fepicop	Yes	Yes	Yes	Yes	n.a.	n.a.	n.a.
PT	Aecops	Yes	Yes	Yes	Yes	n.a.	n.a.	n.a.
PT	AICCOPN	69%	Yes	Yes	1%	No	Yes	No
RO	FPSC	34%	33%	24%	9%	n.a.	n.a.	n.a.
RO	ARACO	24%	32%	32%	13%	No	Yes	No
SE	Byggföretagen	47%	43%	9%	1%	Yes	No	No
SI	GZS – CCBMIS	No	Yes	Yes	Yes	Yes	No	No
SK	ZSPS	28%	37%	27%	9%	Yes	No	No

Notes: n.a. = not available. Percentages are rounded and do not necessarily total 100%. The largest proportion of membership fees may involve one or two company size groups (multiple answers were possible). In column 3 of the table, the company size groups where the organisation has 40% or more of the membership are marked green to indicate the predominance of the membership strength. The FIEC member organisations that did not provide information on the proportion of affiliated companies in each company size group nevertheless indicated whether they have member companies in each category (Table 28). Where this is the case, a 'yes' has been included in the table. Where this is not the case, a 'no' has been given in red. LBP from Latvia is struck through because it was affiliated to the FIEC until the end of 2021, when the data for this study were collected. Since the beginning of 2022, it has not been a member of the FIEC.

Source: NEC

3.3. Representativeness of the EFBWW and the FIEC

Table 51 summarises the representativeness of the EFBWW and the FIEC in the construction sector, showing their numbers of affiliated trade unions and employer organisations and business associations.

In total, 77 trade unions in 27 Member States could be identified. Of these 77 unions, 50 (65%) from 24 countries are affiliated to the EFBWW. Out of the 73 trade unions that are involved in sector-related collective bargaining, 50 (68%) are members of the EFBWW. This means that all EFBWW affiliates are involved in collective bargaining.

On the employers' side, the study identified 93 sector-related employer organisations and business associations in 27 countries. The FIEC has 33 sector-related members in 24 countries – that is, 35% of all organisations considered in this study. The FIEC has no national member organisation affiliated in Latvia, Malta or Poland. Overall, 29 of the 33 FIEC affiliates are involved in collective bargaining – that is, 38% of all organisations involved in collective bargaining.

Table 51: Membership structure of the EFBWW and the FIEC, 2021

	Organisations	Countries with organisations	Organisations involved in collective bargaining	Countries with organisations involved in collective bargaining
Sector-related trade unions (number)	77	27	73 ⁴⁹	27
Affiliates of the EFBWW (number)	50, representing more than 850,000 workers	24	50	24
Share that is affiliated to the EFBWW (%)	65	89	68	89
Sector-related employer organisations/business associations (number)	93	27	76 ⁵⁰	24
Affiliates of the FIEC (number)	33	24	29	21
Share that is affiliated to the FIEC (%)	35	89	38	88

Source: Calculated on the basis of information provided by the NEC

⁴⁹ There are four trade unions that are not involved in sector-related collective bargaining and are not affiliated to the EFBWW. However, these four trade unions are still considered in this study. This is because two organisations in Greece (OOSSE and OHMEE) were involved in collective bargaining several years ago and may resume this task again in the future, while YTN of Finland is not a signatory of an agreement but is de facto involved in negotiations and SPS of Lithuania is involved in sector-related social dialogue practices.

⁵⁰ Those employer and business organisations neither involved in collective bargaining nor affiliated to the FIEC are included in this study due to their affiliation to the EBC or their participation in sectoral social dialogue.

Table 52: Organisational capacity of the EFBWW, based on the involvement of its member organisations

Member State	Trade union	Involved in EFBWW management bodies	Pays affiliation fees for its members in the construction sector	Involved in EFBWW sectoral working groups
AT	GBH	n.a.	n.a.	n.a.
BE	ABVV-FGTB ACCG	n.a.	n.a.	n.a.
BE	ACLVB-CGSLB	n.a.	n.a.	n.a.
BE	ACV-CSC BIE	Yes	Yes	Yes
BG	FITUC	No	Yes	No
BG	FCIW	Yes	Yes	Yes
CY	OOIM-SEK	Yes	Yes	Yes
CZ	OS Stavba	No	Yes	No
DE	IG BAU	Yes	Yes	Yes
DK	3F	Yes	Yes	Yes
DK	Dansk Metal	No	Yes	No
DK	DEF	Yes	Yes	No
DK	Blik&Rør	No	Yes	n.a.
DK	MFD	No	Yes	Yes
ES	CCOO del Hábitat	Yes	Yes	Yes
ES	ELA – Industria eta Eraikuntza	No	Yes	No
ES	UGT FICA	Yes	Yes	Yes
FI	RL	Yes	Yes	Yes
FI	Pro	No	Yes	Yes
FR	FNCB-CFDT	Yes	Yes	Yes
FR	FO Construction	Yes	Yes	Yes
FR	BATI-MAT-TP CFTC	Yes	n.a.	n.a.
FR	FNCSBA CGT	Yes	Yes	Yes
HR	SGH	No	Yes	No
HR	NCS	No	Yes	No
HU	ÉFÉDOSZSZ	Yes	Yes	Yes
IE	SIPTU	Yes	Yes	Yes
IE	Unite	Yes	Yes	Yes
IE	Connect	No	Yes	Yes
IT	Fillea CGIL	Yes	Yes	Yes
IT	FILCA CISL	Yes	Yes	Yes
IT	Fenealuil	Yes	Yes	Yes
LU	SBABCM-OGBL	No	Yes	No
LU	LCGB-CA	No	Yes	No
LV	LBNA	Yes	Yes	Yes
MT	GWU	Yes	Yes	Yes
NL	FNV	Yes	Yes	Yes
NL	CNV Vakmensen	Yes	Yes	Yes
PL	SBiPD NSZZ Solidarność	No	No	Yes

Member State	Trade union	Involved in EFBWW management bodies	Pays affiliation fees for its members in the construction sector	Involved in EFBWW sectoral working groups
PL	ZZ Budowlani	Yes	Yes	Yes
PT	Setaccop	Yes	Yes	No
RO	FGS Familia	No	Yes	No
SE	Målarna	No	Yes	No
SE	Byggnads	Yes	Yes	Yes
SE	Ledarna	n.a.	n.a.	n.a.
SE	Unionen	n.a.	n.a.	n.a.
SE	SEKO	n.a.	n.a.	n.a.
SE	Elektrikerna	n.a.	n.a.	n.a.
SI	SDGD	Yes	Yes	Yes
SK	IOZ	Yes	Yes	Yes

Note: *n.a.* = not available.

Table 52 specifies whether the trade unions affiliated to the EFBWW are involved in the management bodies of this organisation, they pay affiliation fees to the EFBWW for their members in the construction sector and they are actively involved in the working groups of the EFBWW. The table shows that 28 EFBWW affiliates are involved in EFBWW management bodies, whereas 15 are not (for the remaining affiliates, information is not available). Overall, 41 of the 50 EFBWW affiliates pay affiliation fees, while 1 does not (information for the remaining unions is lacking). In addition, 29 of the affiliates participate in working groups, while 12 do not (for the rest the information is not available).

The same organisational capacity aspects are analysed for the FIEC's affiliated organisations in Table 53.

Table 53: Organisational capacity of the FIEC, based on the involvement of its member organisations

Member State	Employer organisation/business association	Affiliated to the FIEC*	Involved in FIEC decision-making structures	Pays affiliation fees for its members in the construction sector	Involved in FIEC working groups
AT	BIB	Yes	Yes	Yes	Yes
AT	FVBI	Yes	Yes	Yes	Yes
BE	Embuild	Yes	Yes	Yes	Yes
BG	BCC	Yes	Yes	Yes	Yes
CY	OSEOK	Yes	Yes	Yes	Yes
CZ	SPS	Yes	No	Yes	No
DE	Bauindustrie	Yes	Yes	Yes	Yes
DE	ZDB	Yes	Yes	Yes	Yes
DK	DI Byggeri	Yes	Yes	Yes	Yes
EE	EEEL	Yes	No	Yes	No
EL	Pedmede	Yes	Yes	Yes	Yes
ES	CNC	Yes	Yes	Yes	Yes
FI	INFRA	(Yes)			
FI	RT	Yes	Yes	Yes	Yes
FI	LVI TU	(Yes)			
FI	GCF	(Yes)			

Member State	Employer organisation/ business association	Affiliated to the FIEC*	Involved in FIEC decision-making structures	Pays affiliation fees for its members in the construction sector	Involved in FIEC working groups
FR	FNTP	Yes	Yes	Yes	Yes
FR	FFB	Yes	Yes	Yes	Yes
HR	HUP-UPG	Yes	No	Yes	Yes
HU	ÉVOSZ	Yes	Yes	Yes	Yes
IE	CIF	Yes	Yes	Yes	Yes
IT	ANCE	Yes	Yes	Yes	Yes
LT	LSA	Yes	No	Yes	No
LU	GEBTP	Yes	Yes	Yes	Yes
LV	LBP	Yes	No	Yes	No
NL	Bouwend NL	Yes	Yes	Yes	Yes
PT	Fepicop	Yes	Yes	Yes	Yes
PT	Aecops	(Yes)			
PT	AICCOPN	(Yes)			
RO	ARACO	Yes	Yes	Yes	Yes
RO	FPSC	Yes	Yes	Yes	Yes
SE	Byggföretagen	Yes	Yes	Yes	Yes
SI	GZS – CCBMIS	Yes	No	Yes	Yes
SK	ZSPS	Yes	Yes	Yes	Yes

* Parentheses indicate indirect affiliation through another organisation.

3.4. National trade unions not represented by the EFBWW

There are 27 national construction trade unions not represented by the EFBWW in the construction ESSDC. These 27 trade unions not affiliated to the EFBWW stem from 13 countries – that is, Austria, Cyprus, Estonia, Finland, France, Greece, Ireland, Latvia, Lithuania, the Netherlands, Portugal, Slovenia and Sweden.

Of the 27 organisations not affiliated to the EFBWW, 22 from 12 countries represent blue-collar workers and 18 from 10 Member States represent white-collar workers. Based on the information that was provided, engineers are represented by 15 trade unions not affiliated to the EFBWW from 10 countries and managers are represented by 14 trade unions not affiliated to the EFBWW from 10 Member States. Whereas – according to the information available – 9 trade unions not represented by the EFBWW from six countries organise and represent workers posted from abroad, only relatively few trade unions not affiliated to the EFBWW represent self-employed workers (4 unions from three Member States). Overall, the membership domains in terms of worker categories of those trade unions not affiliated to the EFBWW largely correspond to the membership domains of all 77 sector-related trade unions considered in this study (see Tables 18–20 in Section 2.1).

When looking at the membership domain coverage in terms of company size, Table 20 in Section 2.1 indicates that among the large companies (with 250 or more employees) trade union representation is exerted primarily by EFBWW affiliates rather than unions not affiliated to the EFBWW. Of the six trade unions not representing employees in large companies, four are not affiliated to the EFBWW.

Table 21 in Section 2.1 includes information on the relative importance (in terms of membership strength) of individual trade unions among large companies and among SMEs in each country. This

table shows that in a vast majority of Member States the most important trade unions are affiliated to the EFBWW. Only in six countries are the most important trade unions identified not EFBWW members: Oikodomoi-PEO of Cyprus, ETTA of Estonia, OOSEE of Greece, LCDA of Latvia, LPPSF of Lithuania and Feviccom of Portugal. In Estonia, Greece and Lithuania, however, there are no EFBWW affiliates at all, meaning that a non-affiliate must be the largest/most important trade union in these countries.

As shown in Table 23 in Section 2.2, 23 of the 77 trade unions are signatory parties to collective agreements that cover at least 90% of the sectoral workforce of their countries, and only two of them are not affiliated to the EFBWW. Where trade unions not affiliated to the EFBWW are involved in collective bargaining covering more than 50% of the sectoral workforce, they usually form bargaining cartels with unions affiliated to the EFBWW. This is the case for Oikodomoi-PEO of Cyprus, CFE-CGC BTP of France and both BATU and Opatsi of Ireland, for example. Most trade unions not represented by the EFBWW, however, either are (currently) not at all involved in collective bargaining or are signatories to collective agreements covering only 10% or less of the construction sector's workforce in a country.

When looking at the involvement of those trade unions not affiliated to the EFBWW in bipartite or tripartite social dialogue bodies related to the construction sector, it becomes evident that most of those unions do not engage in such bodies. At least 15 of the 27 trade unions not affiliated to the EFBWW are not involved in social dialogue (data are not available for all unions). This contrasts with the value for all 77 trade unions: at least 52 (68%) of the 77 participate in social dialogue structures (Table 26 in Section 2.3).

At least 19 (information is not available for all unions) of the 27 trade unions (70%) not represented by the EFBWW do not participate in paritarian organisations dealing with sector-related issues. This share is significantly higher than the corresponding share of all 77 sector-related trade unions, which means that unions not affiliated to the EFBWW tend to be less involved in paritarian structures (see the list of paritarian organisations related to the sector in Section 2.9). The same holds true of these trade unions' consultation practices. At least 11 of the 27 trade unions not affiliated to the EFBWW (41%) are not consulted by governments at all, while this share among the total of 77 trade unions is at about 23% (Table 26 in Section 2.3).

3.5. National employer organisations not represented by the FIEC

There are 60 national sectoral employer organisations not represented by the FIEC in the construction ESSDC. They are from 21 countries: Austria, Belgium, Croatia, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia and Sweden.

Table 27 in Section 2.4 shows whether the sector-related employer organisations and business associations cover at least part of all three subsectors (NACE 41, NACE 42 and NACE 43). Of the total of 93 organisations, 57 from all of the EU27 do so, whereas 36 organisations represent members that are active in only one or two subsectors. Most of these 36 organisations (that is, 32) are not affiliated to the FIEC. This means that, of the 60 employer organisations not affiliated to the FIEC, 32 organisations have a membership domain that is confined to one or two subsectors within the construction industry. Thus, the membership domain in terms of business activity of the non-FIEC members tends to be narrower than that of the employer organisations represented by the FIEC. In terms of membership domain patterns, however, there is almost no difference between those organisations affiliated to the FIEC and those that are not. Among both subgroups, the share of organisations with a sectional membership domain relative to the construction sector is about 35–39%. Likewise, there is almost no difference between FIEC members and non-FIEC members in terms of the membership domain coverage in terms of company size classes. A vast majority of both subgroups with information available represent companies of all size class categories (see Table 28 in Section 2.4).

Looking at the national employer organisations not represented by the FIEC in the ESSDC, and the members these organisations represent at national level, indicates the limits of representativeness and opportunities for future capacity-building initiatives. Considering the significance of company size classes in the contributions to membership fees of the sector's employer organisations and business associations, it becomes apparent that among organisations not affiliated to the FIEC the group of microenterprises is much more important in terms of contributing membership fees than it is among FIEC members. While 21 of the 60 organisations not affiliated to the FIEC indicate obtaining the largest proportion of membership fees from microenterprises, only 3 out of the 33 FIEC members do (however, it is important to note that for more than one-third of the organisations no data were provided) (see Table 29 in Section 2.4).⁵¹

Tables 31 and 32 in Section 2.4 provide information on the relative importance (in terms of the number of employees working in member companies) of the sector-related employer organisations and business associations in the construction sector of a country, whereby the tables differentiate between the significance of an organisation among large companies on the one hand and SMEs on the other hand. While in 24 Member States the most important organisation(s) among large

⁵¹ This does, however, need to be read together with the findings on the representativeness of the FIEC (Table 28), which indicate that the FIEC represents 31 of the 81 national employer organisations/business associations representing microfirms (38%) in 23 Member States, and 33 employer organisations/business associations representing companies with 10–49 and 50–249 employees – equating to, respectively, 40% and 44% – in 24 Member States. The EBC represents 18 national employer organisations/business associations representing microfirms (note that Bouwunie does not cover the entire country – it only covers Flanders and Brussels as membership domains) (22%) in 15 Member States, and 17 for the 10–49 size group (21%).

companies is affiliated to the FIEC, this is not the case for the three Member States where the FIEC has no member organisation: Latvia, Malta and Poland.

Regarding the national employer organisations that organise the largest number of SMEs in their country, these are affiliated to the FIEC in 17 Member States and to the EBC in 10 Member States. As mentioned, the CNC of Spain is affiliated to both the FIEC and the EBC.

Table 33 in Section 2.5 shows that 16 of the 93 sector-related employer organisations and business associations are not involved in collective bargaining targeting construction workers. Of these 16 organisations, 12 from nine Member States are not affiliated to the FIEC. Most of these 12 organisations are considered in this study due to their affiliation to the EBC. Only SATE of Greece and PZPB and KBiN of Poland, all three of which are not involved in collective bargaining, are not affiliated either to the FIEC or to the EBC. They are included in this study because they used to be a signatory party to collective agreements (SATE) or they participate in effective social dialogue (PZPB and KBiN). All 47 other organisations not affiliated to the FIEC are involved in collective bargaining, which is multi-employer bargaining (sometimes in combination with single-employer bargaining) in all cases but one: MEA of Malta conducts exclusively single-employer bargaining. Only 4 of the 47 organisations not affiliated to the FIEC but involved in collective bargaining have concluded collective agreements covering only particular company size classes. All 43 other organisations have concluded agreements covering all company size classes (Table 34 in Section 2.5).

When looking at the involvement in bipartite or tripartite social dialogue of those 60 employer organisations and business associations not affiliated to the FIEC, it can be seen that at least 20 of them (33%) do not engage in social dialogue bodies (for some organisations, data were not available). The corresponding share of FIEC members is 12%. At least 31 (information was not provided for all organisations) of the 60 organisations (52%) not represented by the FIEC do not participate in paritarian organisations. The corresponding share among organisations affiliated to the FIEC is 39% (see Table 35 in Section 2.6).

3.6. Other European trade union associations

As indicated earlier in this study, 50 of the 77 sector-related trade unions are affiliated to the EFBWW on behalf of their construction workers. In addition to being members of the EFBWW, the sector-related trade unions may be members of other European sectoral and cross-sectoral associations.

Table 54 provides an overview of the 20 national trade unions with membership of associations other than the EFBWW. Eleven unions are affiliated to IndustriAll, six to EPSU, five to UNI Europa, three to EFFAT and two to ETF; single memberships can be found with a number of other associations. However, these memberships appear to originate from trade unions' domains covering business areas outside the construction sector in the cases of trade unions with overlapping domains relative to the construction sector, meaning that these affiliations are not for construction sector workers. Although the affiliations given in Table 54 are probably not exhaustive, this overview emphasises the EFBWW's status as the sector's principal labour representative at European level. Of the 20 national sectoral trade unions affiliated to other organisations, 12 are also affiliated to the EFBWW and as such represented in the ESSDC (marked in green in the last column in Table 54). The eight not affiliated to the EFBWW are in the Member States Austria, Cyprus, Estonia, Finland, Greece and Sweden.

Table 54: Construction sector trade unions affiliated to other European associations, 2021

Member State	Trade union	Affiliated to other European associations	Management bodies	Pay affiliation fees	Involved in working groups	Affiliated to the EFBWW
AT	GPA	IndustriAll, UNI Europa	n.a.	n.a.	n.a.	No
AT	PRO-GE	IndustriAll, EFFAT	n.a.	n.a.	n.a.	Yes
BE	ACV-CSC BIE	IndustriAll, UNI Europa	Yes	No	No	Yes
BG	FCIW	EPSU	No	Yes	No	Yes
CY	OBIEK-SEK	IndustriAll	Yes	Yes	Yes	No
EE	EEAÜL	EPSU	No	Yes	Yes	No
EL	OOSEE	UITBB	Yes	Yes	Yes	No
EL	OHE	IMF	No	No	No	No
ES	CCOO del Hábitat	UNI Europa, EPSU	Yes	Yes	Yes	Yes
ES	ELA – Industria eta Eraikuntza	IndustriAll	Yes	Yes	No	Yes
ES	UGT FICA	IndustriAll	Yes	Yes	Yes	Yes
FI	JHL	EPSU	n.a.	n.a.	n.a.	No
FI	FEWU	IndustriAll	Yes	Yes	Yes	No
IE	SIPTU	EFFAT, ETF, EPSU, IndustriAll, FIM, FIA	Yes	No	No	Yes
IE	Unite	Yes, many	Yes	No	No	Yes
IE	Connect	EAA	No	Yes	No	Yes
MT	GWU	UNI Europa, EURO WEA, Eurocadres, ETF, EFFAT, EPSU, IndustriAll				Yes
SE	Sveriges Ingenjörer	IndustriAll, UNI Europa, FEANI				No
SI	SDGD	BWI	Yes	Yes	Yes	Yes
SK	IOZ	IndustriAll	n.a.	Yes	Yes	Yes

Note: n.a. = not available.

Source: NEC

3.7. Other European employer organisations and business associations

Table 55 provides information on affiliations to organisations other than the FIEC. Several employer organisations and business associations are affiliated to the EBC, which is not included in Table 55 and will be dealt with separately in this report. Apart from affiliations to the FIEC and the EBC, this table includes multiple affiliations to the EIC (seven direct and two indirect affiliations), GCP Europe (five direct affiliations), SMEunited (five direct affiliations) and EuropeOn (three direct affiliations). In addition, several single affiliations to other European associations can be found. The EIC, GCP Europe and EuropeOn are European interest organisations dealing with matters related to the construction sector and can be considered sector related. All other European-level associations recording affiliations from sector-related national organisations do not seem to have a direct connection with the construction sector.

There are 28 national sectoral organisations affiliated to other European associations, of which 7 are also directly affiliated to the FIEC and 4 are indirectly affiliated to the FIEC. The remaining 17 organisations are not directly or indirectly represented by the FIEC but are affiliated to another European organisation. The EBC, which has 18 affiliated sectoral organisations in 15 Member States, is analysed separately in more detail in Section 3.8.

Table 55: Construction sector employer organisations and business associations affiliated to the FIEC* and other European associations except the EBC, 2021

Member State	Employer organisation/ business association	Affiliated to other European associations	Decision-making structure	Membership fees	Working groups	Also affiliated to the FIEC
AT	BIBHG	EACD, FESI	n.a.	n.a.	n.a.	No
AT	BIDGS	IFD	n.a.	n.a.	n.a.	No
AT	BIHB	TCE	n.a.	n.a.	n.a.	No
AT	BIMT	UNIEP	n.a.	n.a.	n.a.	No
BG	BCC	EIC, Build Europe, CICA	Yes (EIC)	Yes	Yes	Yes
DK	DI Byggeri	EIC	n.a.	n.a.	n.a.	Yes
DK	Tekniq	EuropeOn, GCP Europe	n.a.	n.a.	n.a.	No
EL	Pedmede	EIC, EDA, ACRP	Yes	Yes	Yes	Yes
EL	POSEH	EuropeOn	No	No	Yes	No
FI	MTA	COPA				No
FI	LVI TU	GCP Europe	No	Yes	Yes	(Yes)
FI	GCF	EIC	Yes	Yes	No	(Yes)
HR	HOK	SMEunited				No
HU	IPOSZ	SMEunited	Yes	Yes	Yes	No
IE	CIF	GCP Europe	Yes	Yes	Yes	Yes
IT	ANCE	EIC	Yes	Yes	Yes	Yes
LU	FDA	SMEunited	Yes	Yes	Yes	No
MT	MEA	SGI Europe	Yes	Yes	Yes	No
NL	Techniek Nederland	EuropeOn, GCP Europe				No
PL	ZRP	SMEunited				No
PT	Fepicop	EIC	Yes	n.a.	n.a.	Yes
PT	Aecops	(EIC)				(Yes)
PT	AICCOPN	(EIC)				(Yes)
SE	Byggföretagen	EIC	Yes	Yes	Yes	Yes
SE	P&V	GCP Europe	Yes	Yes	Yes	No
SE	IN	AIE	n.a.	n.a.	n.a.	No
SE	GBF	UEMV	n.a.	n.a.	n.a.	No
SI	OZS	SMEunited				No

* Including indirect FIEC members (in parentheses).

Note: n.a. = not available.

Source: NEC

A review of the membership of the national employer organisations and business associations is provided in Table 56. However, this table includes affiliations through countries' national

organisations, some of which are not considered sector-related and thus not included in the rest of this study.

Table 56: EU associations other than the FIEC and the EBC with construction sector national employer organisations and business associations as members, 2021

Other EU employer organisations/business associations			Countries with an affiliate according to organisation websites
Abbreviation	Full name	Assessment of sector-relatedness	
EIC	European International Contractors	Industry association representing the interests of internationally active European contractors in construction	AT, BE, BG, DE, DK, EL, ES, FI, FR, IT, NL, PT
GCP Europe	Genie Climatique et Plomberie Europe ⁵²	The voice of the building services engineering sector, mechanical contractors, plumbers and HVAC installers	AT, BE, DE, DK, ES, FI, IE, LU, NL, SE
EuropeOn	Electrical Contractors Association	European voice of the electrical contracting industry	AT, BE, DE, DK, FI, FR, LU, NL, SE
UNIEP	International Association of Painting Contractors	Painters only (part of NACE 43)	AT, BE, CZ, DE, DK, ES, FR, HU, LU, SI, SK

Sources: Authors' own compilation, based on the NEC's national contributions to this study and on organisation websites

The FIEC has a partnership agreement with the EIC. The organisations work together on certain key documents and have organised joint conferences. Their statutes set out that the President of the FIEC automatically has a seat on the Board of the EIC and that the President of the EIC has a seat on the Board of the FIEC. Representatives of the EIC attend FIEC General Assembly meetings.

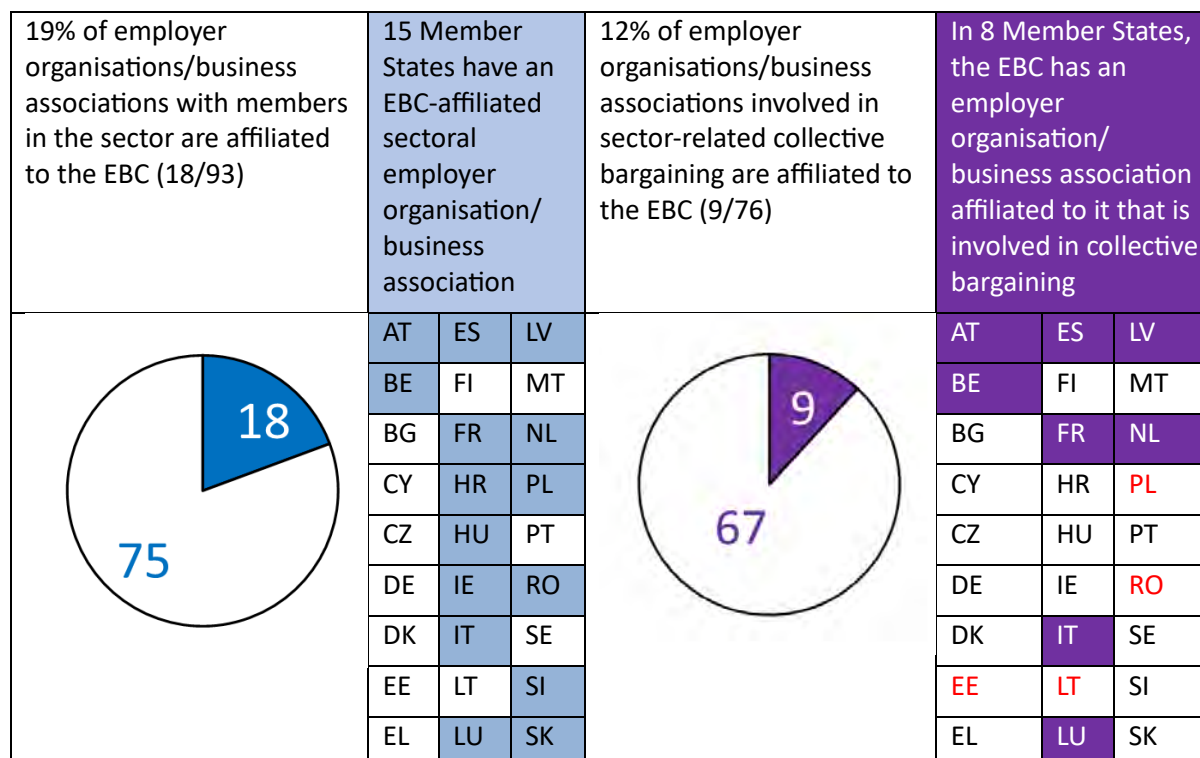
UNIEP formally joined the EBC as an associate member in June 2024, following a decision of the EBC General Assembly held on 18 June 2024. The relationship with the EBC is one of indirect membership for all UNIEP members, with the exceptions of CAPEB in France and OZS in Slovenia, which are directly affiliated to the EBC (and count towards the representativeness of the EBC); all other UNIEP member organisations (except for Embuild of Belgium) only cover painting professionals/craftspeople and are therefore only affiliated to UNIEP. The Belgian member of UNIEP, Embuild, covers the entire construction sector and is affiliated to the FIEC. The Luxembourgish member of UNIEP is linked to the EBC member FDA and the Slovak member is linked to the EBC member SZZ. This indirect membership through UNIEP adds to the representativeness of the EBC in terms of the (indirect) membership of painters (NACE 43).

⁵² Initially, GCP Europe was called Genie Climatique Internationale – Union Internationale de la Couverture et de la Plomberie (GCI-UICP).

3.8. Membership domain of the EBC

The EBC represents European construction craftspeople and SMEs, and thus has a membership domain sectionalist relative to the construction sector. According to its website, it is affiliated to SMEUnited, is a founding member and partner of Small Business Standards – the organisation representing SMEs in standardisation as per Regulation (EU) No 1025/2012 (Annex III) – and is a member of the European Council for Construction Research, Development and Innovation, the European Housing Forum and the public–private partnership Built4People.

Figure 19: Scoreboard of the representativeness of the EBC in the construction sector



Notes: Red font indicates countries in which none of the employer organisations/business organisations are involved in collective bargaining. The CNC, the Spanish member of the EBC, is affiliated to both the FIEC and the EBC. The Belgian member, Bouwunie, organises companies in two of the three regions in Belgium (Flanders and Brussels, but not Wallonia); from this perspective, it does not cover the entire country.

Sources: Tables 27, 33 and 34

Figure 19 shows that 18 of the 93 sector-related employer organisations and business associations are affiliated to the EBC, covering 15 countries. In Spain, the most important organisation in terms of membership in construction – namely, the CNC – is affiliated to both the EBC and the FIEC (Table 57). In the remaining Member States, none of the three largest employers is a member of an employer organisation or business association affiliated to the EBC, as the EBC aims to represent the points of view of only craftspeople, microfirms and SMEs in the sector.

Table 57: Affiliation of sector-related employer organisations and business associations to the EBC, 2021

Member States	Employer organisations/business associations affiliated to the EBC	Is the most important organisation in terms of membership affiliated to the EBC?	Is one of the largest three employers in the sector a member of an affiliated employer organisation/business association?
AT	BIBHG	No	No
BE	Bouwunie	No	No
BG	None	No	No
CY	None	No	No
CZ	None	No	No
DE	None	No	No
DK	None	No	No
EE	None	No	No
EL	None	No	No
ES	CNC	Yes	No
FI	None	No	No
FR	CAPEB, SNSO	No	No
HR	HOK	No	No
HU	IPOSZ	No	No
IE	NGMC	No	No
IT	Anaepa, CNA Costruzioni	No	No
LT	None	No	No
LU	FDA	Yes	No
LV	LBA	No	No
MT	None	No	No
NL	AfNL	No	No
PL	ZRP	No	No
PT	None	No	No
RO	UNPR, Zepher Cluster	No	No
SE	None	No	No
SI	OZS	No	No
SK	SZZ	No	No

Notes: Organisations in **bold** are the most important in terms of membership in the sector per country.

Source: NEC

In terms of aggregate sector coverage – that is, the coverage relative to the sector of all EBC members per country altogether (if there is more than one affiliate per country) – the EBC through its affiliates covers at least part of all subsectors in all but one of the Member States where it has a member organisation (Table 58). In France, the NACE 42 subsector is not at all covered by the two EBC affiliates. In terms of the aggregate membership domain of all member organisations altogether relative to the sector, sectionalism and sectional overlaps prevail, with five cases each; this is due to the focus of the EBC on craftspeople and SMEs. Although these companies may be active in all subsectors of construction, this nevertheless confines the purview of the domain in terms of

company size. However, there are also cases of (aggregate) membership domains congruent or overlapping relative to the sector.

Table 58: Cumulative sector coverage of EBC member organisations per country, 2021

Member State	Employer organisations and business associations affiliated to the EBC	Member organisations together cover:			Membership domain of all member organisations relative to the sector
		At least part of NACE 41	At least part of NACE 42	At least part of NACE 43	
AT	BIBHG	Yes	Yes	Yes	S
BE	Bouwunie	Yes	Yes	Yes	O
BG	None				
CY	None				
CZ	None				
DE	None				
DK	None				
EE	None				
EL	None				
ES	CNC	Yes	Yes	Yes	C
FI	None				
FR	CAPEB, SNSO	Yes	No	Yes	S
HR	HOK	Yes	Yes	Yes	C
HU	IPOSZ	Yes	Yes	Yes	SO
IE	NGMC	Yes	Yes	Yes	S
IT	Anaepa, CNA Costruzioni	Yes	Yes	Yes	C
LT	None				
LU	FDA	Yes	Yes	Yes	C
LV	LBA	Yes	Yes	Yes	SO
MT	None				
NL	AfNL	Yes	Yes	Yes	S
PL	ZRP	Yes	Yes	Yes	SO
PT	None				
RO	UNPR, Zepher Cluster	Yes	Yes	Yes	SO
SE	None				
SI	OZS	Yes	Yes	Yes	O
SK	SZZ	Yes	Yes	Yes	SO

Notes: Membership domain patterns relative to the construction sector: C = congruence, O = overlap, S = sectionalism, SO = sectional overlap.

Source: NEC

Table 59 shows the EBC members' coverage and relative strength in terms of company size classes. Interestingly, although the focus of the EBC is mainly on craftspeople and SMEs, some EBC affiliates represent all company size classes. None of the organisations affiliated to the EBC, except for FDA in Luxembourg and UNPR in Romania, represent the larger companies – that is, those with more than 250 employees. However, a proportion of approximately 0% of large companies does not necessarily indicate that large companies are not represented at all (see BIBHG of Austria, HOK of

Croatia and AfNL of the Netherlands). Among those 14 EBC affiliates for which information has been provided, microcompanies, with fewer than 10 employees, form the strongest part out of all company size classes in terms of membership (in the cases of UNPR and the Zepher Cluster of Romania, taken together with the size class of companies with 10–49 employees). Overall, 10 of the 14 EBC affiliates with data available indicate that microcompanies are the company size group contributing the largest proportion of membership fees.

Table 59: EBC member organisations' coverage and relative strength in terms of company size classes, and importance of company size classes for contributing membership fees, 2021

Member State	Employer organisations and business associations affiliated to the EBC	Membership strength in each of the company size groups, by number of employees				Company size groups contributing the largest proportion of membership fees		
		1–9	10–49	50–249	250+	250+	10–249	0–9
All 18 EBC member organisations: 247,594 companies and self-employed people ⁵³		224,138 91.4%	20,305 8.3%	735 0.3%	66 0.03%			
AT	BIBHG	92%	7%	1%	0%	n.a.	n.a.	n.a.
BE	Bouwunie	92.5%	7%	0.5%	0.03%	n.a.	n.a.	n.a.
BG	None							
CY	None							
CZ	None							
DE	None							
DK	None							
EE	None							
EL	None							
ES	CNC	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FI	None							
FR	CAPEB ⁵⁴	95%	4%	1%	0%	No	No	Yes
FR	SNSO	n.a.	n.a.	n.a.	0%	No	Yes	No
HR	HOK	87%	12.5%	0.5%	0%	No	No	Yes
HU	IPOSZ	99%	n.a.	0%	0%	No	No	Yes
IE	NGMC	93%	5%	2%	0%	No	No	Yes
IT	Anaepa	95%	5%	0%	0%	No	No	Yes
IT	CNA Costruzioni	94.5%	5.4%	0.1%	0%	No	No	Yes
LT	None							
LU	FDA	45%	40%	13%	2%	n.a.	n.a.	n.a.
LV	LBA	n.a.	n.a.	n.a.	n.a.	No	Yes	No
MT	None							
NL	AfNL	78%	18%	3%	0%	No	No	Yes
PL	ZRP	83%	16%	1%	0%	No	No	Yes
PT	None							
RO	UNPR	27%	27%	32%	14%	No	Yes	No

⁵³ For 245,244 companies, the data can be broken down per company size group; therefore, 245,244 corresponds to 100% here.

⁵⁴ The EBC confirms that CAPEB does not represent companies with 250 employees or more in France but has among its members a few companies with membership slightly below the 250-employee threshold. Specifics of the industrial relations landscape in France are given in Section 2.12.

RO	Zepher Cluster	50%	50%	0%	0%	No	Yes	Yes
SE	None							
SI	OZS	85%	13%	2%	0.3%	No	Yes	No
SK	SZZ ⁵⁵	n.a.	n.a.	0%	0%	No	No	Yes

Notes: *n.a.* = not available. Percentages are rounded and do not necessarily add up to 100%. The largest proportion of membership fees may involve one or two company size groups (multiple answers were possible). The green marked cells indicate where the majority of the member companies lies for each of the affiliated organisations.

Source: NEC

3.9. Capacity to negotiate of the EFBWW, the FIEC and the EBC

The EFBWW is the European workers' industry federation for the building, woodworking, forestry and allied industries and trades and is affiliated to the ETUC. It is headquartered in Brussels and has, according to the Preamble of its December 2023 Constitution, the task of promoting and upholding 'the economic, social, political and cultural interests of all workers' in the above-listed industries and trades. The federation is committed to 'work[ing] in close cooperation with the affiliated organisations on all social, economic, political and environmental questions within Europe' (Article 5 of the constitution). According to the constitution, the EFBWW must 'ensure that the necessary influence is brought to bear on all major European bodies ... with regard to legal, policy and other European developments and through social dialogue, such that the specific problems and interests of the industries represented by the EFBWW⁵⁶ are taken into account'. In turn, the member unions, which are autonomous organisations in terms of their activities at national level, have the task of supporting and developing at national level the decisions taken jointly at European level.

The main statutory bodies are the EFBWW Congress,⁵⁷ the Executive Committee, the Presidium, the Standing Committees Building and Wood, and the Auditing Committee. The Congress, which is the supreme authority and composed of the delegates of all member organisations, elects – besides other important officials – the President of the Standing Committees Building and Wood. Moreover, the Executive Committee, which is responsible for strategic and decision-making matters, appoints the members and the Vice-Presidents of the Standing Committees Building and Wood (Articles 9 and 10). The Standing Committees Building and Wood, are the units that adopts internal regulations by a simple majority, comprising the composition, the terms of reference and the chairperson of the negotiation group regarding European sectoral social dialogue (Article 11 of the constitution). The Standing Committee Building and Wood are responsible for identifying issues arising in the sector at EU level and for submitting proposals to the Executive Committee (Article 16).

The FIEC, created in 1905, represents construction enterprises of all sizes and all types, from large international enterprises to individual craftspeople, both main contractors and subcontractors. It is an international non-profit-making association and organises, at European level, federations and

⁵⁵ Regarding Slovakia, the EBC reported that the Association of Masonry Materials Producers joined SZZ in 2023, with four large companies; see also the web page on Združenie výrobcov murovacích materiálov, available at <https://zvm.sk/o-zdruzeni/>. None of those companies is a member of ZSPS, according to the EBC. As mentioned in Table 31, the 300 members of SZZ are self-employed people rather than companies.

⁵⁶ EFBH-FETBB was the legal name of the EFBWW in the 2015 statutes.

⁵⁷ In the December 2023 Statutes, the EFBWW General Assembly (from the 2015 Statutes) was renamed the Congress.

associations of employers in the construction industry adhering to the FIEC Articles of Association. Its headquarters are located in Brussels. The organisation's aim is to 'ensure ... the promotion and defence of the specific interests of its members to all institutions, all organisations or all persons and at all levels' (Article 4 of the Articles of Association). Article 5 of the Articles of Association provides for five categories of membership: statutory members, policy members, non-EU-country members, associate members and supporting members. Statutory members are national associations or federations of an EU country representing construction enterprises that regularly pay the annual subscriptions fixed per country. They have the right to attend the General Assembly meetings and have voting rights. By contrast, policy members are associational members that are not able or willing to pay the full subscription or do not want to participate in the governance of the FIEC. They are convened to the General Assembly meetings but do not have voting rights. Non-EU-country members are associations from countries beyond the EU that nevertheless want to be part of the FIEC structure. Associate members are national federations or associations representing enterprises specialising in a particular segment of activities within the construction sector. Finally, supporting members can be any European or national organisation or person that commits to the FIEC's aim and wants to financially contribute to its work.

Article 8 of the Articles of Association identifies the three governing bodies of the FIEC. The General Assembly is composed of delegations from each statutory member association or federation and is the supreme body of the FIEC. Its main tasks comprise decisions on the professional policy and strategy of the organisation, decisions regarding membership issues, election of the President, approval of accounts and approval of the budget and subscriptions (Article 9). The Steering Committee is made up of at least three people, including the FIEC President, the Vice-President(s) and the Treasurer (Article 10). The Steering Committee's task is to implement the General Assembly decisions, and it is responsible for overseeing and directing the management of the organisation (Article 11). The President, elected by the General Assembly upon a proposal from the Steering Committee, calls and chairs the General Assembly and Steering Committee meetings and represents the FIEC vis-à-vis third parties (Article 12).

The Articles of Association do not include provisions on an FIEC mandate or procedures for negotiations at European level on behalf of its members. However, the FIEC General Assembly unanimously confirmed on 8 June 2012 the mandate given to the FIEC in 1998 to negotiate EU agreements within the framework of the European sectoral social dialogue. The FIEC General Assembly decision of 31 May 1998 stipulates that the FIEC shall set up sectoral social dialogue together with the EFBWW and that the Steering Committee has to ask the General Assembly for a specific mandate prior to commencing any negotiation. The mandate for the FIEC to negotiate European agreements was reconfirmed in 2021 and documented in the minutes of the 21 May 2021 FIEC General Assembly meeting.

Finally, founded in 1990, the EBC organises and represents national professional organisations in the EU, which in turn represent microenterprises, craftspeople and SMEs in the construction sector. It is affiliated to SMEunited, in all independence, with which it co-founded Small Business Standards, the organisation representing SMEs in standardisation. The EBC has its headquarters in Brussels. In 2007, following a request by EBC, it was invited by the FIEC to take part in the employers' delegation for the plenary meetings of the European Social Dialogue Committee for Construction. The EBC Secretary General and an EBC members' expert attend the committee meetings.

As per its statutes, full EBC members are professional organisations that are representative at national level in the EU and that bring together craftspeople and SMEs in the building sector. Associate members can be representative national or European federations of building specialists or federations in the building sector or building specialities from European countries that are not members of the EU (Article 5).

To achieve its objectives, the EBC may carry out the following activities: (a) propose and conduct studies relating directly or indirectly to the application of legislation concerning the craft industry and small and medium-sized building enterprises, to promote the studies of member organisations, and their experiences and initiatives, and to ensure exchanges between member organisations; (b) develop relations with all European and international institutions, such as the European Commission, the European Parliament, the Council of the European Union, the European Economic and Social Committee, the European Committee of the Regions, and any other body likely to further the objectives of the association; (c) collect, disseminate and ensure the exchange of information between its member organisations and with any other body, in accordance with its objectives; and (d) generally carry out any action or perform any legal act within the scope of the objectives (Article 4).

Regarding its governance, the EBC relies on an Executive Committee (Bureau) comprising the President, the Vice-President, the past President and the Treasurer to ensure the implementation of the decisions taken by the Board and Assembly; a Board of Directors comprising representatives of full members and observers from associate members, the meetings of which are called by the President to steer the work and make propositions to the Assembly; and a General Assembly, with powers granted to it by law, which is open to all delegates nominated by their organisations, without a limit as to number. The EBC has internal regulations and has produced internal mandates giving the organisation powers to negotiate in the field of social dialogue at European level, when and if needed, granted by the General Assembly.

A total of 41 joint texts were agreed between the EFBWW and the FIEC between 1996 and 2024, and they are all listed in Table 60. None of them involved the EBC or any other representative organisation in construction at EU level. The EFBWW, the FIEC and the EBC did, however, cooperate in the Pact for Skills in Construction initiative and in the Erasmus+ project Construction Blueprint.

The EBC carried out three social dialogue projects with the financial support of the Directorate-General for Employment and the political support of SMEUnited (EU inter-professional social partner). These projects involved several national social partners, including trade unions, and were on the topics of capacity building, health and safety, and active ageing.

The EBC and the FIEC have produced joint statements outside the context of social dialogue, touching on topics such as skills and health and safety. The EBC and the FIEC are together some of the initiators of the industrial initiative Construction 2050 Alliance, acting as members of its Steering Group. Such collaborations showcase the mutual recognition of each entity and the potential for genuine cooperation.

Table 60: Joint documents produced by the construction ESSDC, 1996–2021

Title	Type	Date
<i>EFBWW and FIEC recommendations on the role of ELA</i>	Joint opinion	28 March 2024
<i>Work programme for the ESSDC of the construction sector 2024–2027</i>	Procedural text	2024
<i>Joint EFBWW–FIEC letter to Swedish Presidency on Prior Notification 883</i>	Joint opinion	28 March 2023
<i>Memorandum of understanding between the European Federation of Building and Wood Workers and the European Construction Industry Federation on the sustainable reconstruction of Ukraine</i>	Joint opinion	14 November 2023
<i>EU Strategic Framework on Health and Safety at Work 2021–2027: Joint declaration by FIEC and EFBWW</i>	Joint opinion	5 October 2022
<i>Joint statement of the European social partners of the construction industry (FIEC–EFBWW) on third country national workers and companies in the EU construction market</i>	Joint opinion	9 June 2021
<i>EFBWW and FIEC joint recommendations to counteract the negative impact and consequences of the current COVID-19 crisis for the construction industry</i>	Joint opinion	21 April 2020
<i>Joint statement of the European social partners from the building sector on the communication ‘Safer and healthier work for all – Modernisation of the EU occupational safety and health legislation and policy’ [COM(2017)12]</i>	Joint opinion	28 June 2018
<i>Working safer with construction machines: A multi stakeholder approach</i>	Joint opinion	7 June 2017
<i>Joint position: Proposal for a directive of the European Parliament and of the Council on single-member private limited liability companies of 9 April 2014 (SUP – COM (2014) 212 final)</i>	Joint opinion	27 February 2015
<i>Towards a level playing field in the European construction sector: Joint proposals of the EU sectoral social partners EFBWW and FIEC</i>	Joint opinion	27 February 2015
<i>Joint statement of the European social partners of the construction industry (EFBWW and FIEC) on proposed compromise amendments (2012/0061(COD– PE498.030v01-00)</i>	Joint opinion	17 June 2013
<i>Joint position of FIEC and EFBWW on fighting against abnormally low tenders (ALTs) in public procurement</i>	Joint opinion	21 February 2013
<i>Joint opinion of EFBWW and FIEC on the new community strategy on health and safety for 2013–2020</i>	Joint opinion	17 December 2012
<i>Joint FIEC–EFBWW proposed amendments on the proposal for a directive on the enforcement of Directive 96/71/EC concerning the posting of workers in the framework of the provision of services [COM(2012) 131]</i>	Joint opinion	29 November 2012
<i>Joint position paper on the directive ‘intra-corporate transfers’ (‘ICT’): EFBWW–FIEC joint position paper in support of the</i>	Joint opinion	16 January 2012

Representativeness of the European social partner organisations: Construction sector

<i>compromise Amendment 24 adopted by the EMPL Committee ('Jaakonsaari Report')</i>		
<i>Joint FIEC–EFBWW proposed amendments on the proposal for a Directive on the enforcement of Directive 96/71/EC concerning the posting of workers in the framework of the provision of services [COM(2012) 131]</i>	Joint Opinion	29 November 2011
<i>Proposed Enforcement Directive COM(2012) 131 final: Joint requests of the European social partners of the construction industry, FIEC and EFBWW, to the EPSCO Council</i>	Joint opinion	26 November 2011
<i>EFBWW–FIEC position on the proposal for a directive on 'conditions of entry and residence of third-country nationals in the framework of intra-corporate transfers' ('ICT') COM(2010) 378</i>	Joint opinion	21 February 2011
<i>EFBWW–FIEC joint statement on third-country contractors and workers in the EU</i>	Joint opinion	19 October 2010
<i>Joint position paper of the European social partners in the construction industry on the findings of the high level group (HLG) on the Action Programme for Reducing Administrative Burdens in the European Union, COM(2007) 23 final</i>	Joint opinion	30 June 2010
<i>Joint conclusions and recommendations of the European social partners in the construction industry on self-employment and bogus self-employment</i>	Joint opinion	5 February 2010
<i>Emerging from the crisis: Fostering growth and jobs for a sustainable construction industry</i>	Joint opinion	29 January 2010
<i>EFBWW–FIEC declaration: The global economic crisis and its consequences for the European construction industry: Positive measures and concerns of the European social partners EFBWW and FIEC</i>	Joint opinion	30 June 2009
<i>FIEC–EFBWW joint declaration on paritarian funds</i>	Joint opinion	8 March 2008
<i>Joint position of the European construction industry's social partners on the communication from the Commission regarding the 'Posting of workers within the framework of the provisions of services: Maximising its benefits and potential while guaranteeing the protection of workers' (COM(2007)304 final)</i>	Joint opinion	11 December 2007
<i>Rules of procedure: European Social Dialogue Committee in the construction sector</i>	Procedural text	22 September 2006
<i>Joint recommendation of the European construction industry's social partners on the prevention of occupational stress in the construction sector</i>	Policy orientations	10 January 2006
<i>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</i>	Joint opinion	19 May 2005
<i>Joint statement of the European construction industry's social partners on young people</i>	Declaration	4 March 2005
<i>Joint declaration of the European construction industry's social partners on the occasion of the European Health & Safety Summit 2004 in Bilbao</i>	Declaration	22 November 2004
<i>Second 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</i>	Joint opinion	9 November 2004

<i>Joint statement of the European construction industry's social partners on the European Week for Safety and Health at Work 2004: Building in safety</i>	Joint opinion	30 April 2004
<i>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</i>	Joint opinion	2 April 2004
Brochure on tutorship	Tool	23 December 2003
<i>Joint FIEC–FETBB declaration regarding the proposed COM(2001)386 – 2001/0154/CNS Directive of 11th July 2001 relating to entry and residence conditions for workers who are national of other countries</i>	Joint opinion	24 June 2003
<i>Recommendations to the national federations regarding implementation of Directive 2001/45/EC on 'working at heights'</i>	Declaration	2 April 2003
<i>Guide of best practices on the co-ordination of health and safety</i>	Tool	1 April 2003
<i>Applications and a look at the work site</i>	Tool	1 April 2003
<i>Guide of best practices on the co-ordination of health and safety in the construction sector</i>	Tool	1 April 2003
<i>Joint FIEC–FETBB declaration</i>	Joint opinion	24 January 2000
<i>Joint FIEC–FETBB position</i>	Joint opinion	23 September 1997
<i>Communication of the social partners issued at the seminar on safety and health in construction</i>	Declaration	10 November 1996

Source: European Commission, Social Dialogue Texts Database

3.10. Effective participation

In 2021–2022, there were six meetings of the EESDC in the construction sector. The 2021 meetings took place in February, April and October 2021. The 2022 meetings took place in March, June and October. The majority of these meetings were held in a hybrid format.

According to the statistics on attendance, the most participants attended the meeting in October 2021, with 32 attendees equally distributed among the representatives of trade unions and employer organisations; however, this represented only 11 countries. The last meeting of 2022, held in October, was the least popular, with only 17 participants from nine countries. In the first meeting of 2021, 21 employer representatives from 14 countries met with only 4 representatives of trade unions from 3 countries, but the five subsequent meetings held in 2021–2022 had almost equal distribution of participants from both sides and participation from many countries. The equal distribution of representatives of trade unions and employer organisations during these meetings suggests that social partners had the opportunity for constructive debate with equal representation of interests.

Social partners from several countries were very consistent in their participation in the committee, such as the representatives from Belgium, who attended all of the six meetings and included representatives from both sides. Social partners from France and Italy had some of their representatives at all six meetings, but not all of them were attended by both union and employer representatives. In other countries, these meetings were less popular: social partners from Denmark had their representatives from employer organisations present at only one meeting. Representatives

from eight countries did not attend any of the six meetings in 2021–2022 and were mostly those from newer Member States: Croatia, Cyprus, Czechia, Estonia, Latvia, Lithuania, Portugal and Slovakia (Table 61). This opens questions on how their interests are represented at European level.

Besides their discussions at official meetings within the plenary ESSDC committee, social partners also discuss their issues during various working group meetings.

Table 61: Effective participation

	Member States
Member States with trade union delegates at ESSDC meetings in 2021–2022	AT, BE, BG, DE, ES, FI, FR, HU, IE, IT, LU, MT, NL, PL, RO, SE, SI (for AT, FI, HU, MT and SI, there was only one participation)
Member States with EFBWW member organisations but no delegates at meetings in 2021–2022	CY, CZ, DK, HR, LV, PT, SK (8) + EL ⁵⁸ (for EE and LT, there is no EFBWW member organisation)
Member States with employers' delegates at ESSDC meetings in 2021–2022	AT, BE, BG, DE, DK, EL, ES, FI, FR, IE, IT, LU, NL, RO, SE, SI (for DK, IE, LU and RO, there was only one participation)
Member States with FIEC member organisations but no delegates at meetings in 2021–2022	CY, CZ, EE, HR, HU, LT, LV, PT, SK (9) (for MT and PL, there is no FIEC member organisation; for LV, there was a member until the end of 2021)

Note: The red marked rows relate to the Member States for which there were no participants in the ESSDC meetings in 2021–2022.

3.11. Representation of social partners in the AEIP

As highlighted in Section 2.9, paritarian social protection institutions are established and managed jointly by trade unions and employers or employer organisations within the framework of collective agreements. These institutions are characterised by their not-for-profit natures and the equal representation of employers and employees in their governing bodies. This collaborative approach ensures that decisions are made in the best interests of both parties.

At European level, national paritarian institutions are represented by the AEIP. Based in Brussels, the AEIP is an advocacy organisation active in the decision-making processes related to European social and economic policies. Its membership consists of non-profit, long-term institutional investors in 12 Member States. These paritarian funds cover approximately 80 million European citizens and manage around €1.3 billion in assets. The AEIP operates through thematic working groups comprising national paritarian institutions. Its membership includes privately managed retirement schemes falling under the social security coordination regulation (first pillar bis), occupational pension funds (second pillar schemes), paritarian insurers and provident funds.

The construction sector stands out as a field where paritarian organisations play a particularly significant role. This can be attributed to the vulnerability of many employees in this sector and the specific needs of the workforce. These needs encompass a wide range of areas, including retirement schemes, complementary healthcare insurance, long-term care, health and safety at work, paid

⁵⁸ The EFBWW has a member organisation in Greece, but it provided no information for this study. In addition, no participant from Greece attended any of the ESSDC meetings in 2021–2022.

holiday schemes, unemployment benefit funds and some other issues. In recognition of the unique needs of the construction sector, the AEIP established a dedicated sectoral working group, which includes both AEIP members and, through a protocol of cooperation, the European social partners of the construction sector: the EFBWW and the FIEC. This working group also involves specific schemes catering to the construction sector, such as paid holiday schemes and accident insurance.

The cooperation between the European social partners of the construction sector and the AEIP enhances the representation and advocacy efforts of both social partners and paritarian institutions at EU level. This collaboration aims to intensify their joint efforts, thereby strengthening industrial relations and ensuring that the needs and interests of the construction sector are effectively addressed in European social and economic policies.

AEIP members active in the construction sector are printed in green bold in Table 40 of Section 2.9 of this report.

4. Conclusions

Economic background and employment trends

The construction sector in the EU employs around 12.69 million people, which amounts to around 6.8% of the total EU workforce (2019). In five Member States, there are more than 1 million workers in the construction sector – this is the case for Germany, France, Spain, Italy and Poland. The highest share of EU construction sector workers is in Germany (20.8%), followed by France (13.9%), Spain (10.5%), Italy (10.4%) and Poland (8.4%). In the other Member States, the share of construction sector workers amounts to less than 4%. Relative to total national employment, the construction sector is largest in Cyprus (9.7%), Estonia (9.3%), Slovakia (9.2%) and Latvia (9.1%) and smallest in the Netherlands (4.6%) and Greece (3.8%). Of the three subsectors (construction of buildings, civil engineering, specialised construction activities), the largest share of workers in the EU (59.9%) is employed in specialised construction activities, such as demolition; site preparation; test drilling and boring; electrical installation; plumbing, heat and air conditioning installation; plastering; joinery installation; floor and wall covering; painting and glazing; and roofing. After a decrease in employment in the overall construction sector in the EU between 2011 and 2015, the EU employment level returned to the levels seen prior to the economic crisis and has been increasing sharply since 2015. The vast majority of people employed in the construction sector (79%) are employees, but with significant variation between countries, from the largest shares of 98.8% in Luxembourg and 97.4% in Romania to the smallest shares of 55.5% in Czechia and 43.2% in Slovakia. Migrant and foreign workers constitute a large portion of some construction sector workforces, from about 8% in Denmark to 40% in Estonia and more than half of the workforce in Cyprus.

The number of companies in the sector also increased over the 10 years from 2011 to 2020. There were a total of 3,536,996 active enterprises in the construction industry in the EU in 2020. Most of the companies are located in France (14.2%), Italy (13.9%), Germany (11.1%), Poland (11.0%) and Spain (10.7%). The countries with the smallest shares of EU construction sector companies are Cyprus (0.3%), Luxembourg and Malta (both 0.1%). Most of the companies are microenterprises with up to nine people employed (94% at EU level). These also employ the largest share of employees (46%), with the rest evenly distributed among larger companies. The larger firms more often engage in activities related to the construction of buildings and civil engineering subsectors than in specialised construction activities.

National level of interest representation

There are 77 sector-related trade unions and 93 employer organisations and business associations in the EU27. All of the Member States have at least one sector-level trade union and one business association or employer organisation. While the number of sector-level trade unions in each Member State varies from one union organisation in smaller countries (Czechia, Germany, Hungary, Malta, Romania and Slovakia) to six in France and seven in Sweden, the number of employer organisations/business associations per country is more diverse and fragmented. Most of the countries have between 1 and 4 employer organisations present in the sector, while Italy and Austria have 9 and 12 employer organisations, respectively.

The majority of sector-level trade unions (54 from 25 countries) cover at least part of all three subsectors of the construction sector, while 21 union organisations represent members in one or

two subsectors. Most of the unions active in the construction sector (70 of 77) organise workers from other sectors too ((sectional) overlap). The majority of trade unions represent both blue-collar and white-collar workers, and almost all trade unions represent employees from companies with 10–249 employees. In microcompanies (1–9 employees) and large companies (250 or more employees), trade union representation is slightly lower. The majority of the most important trade unions in the construction sector from each Member State (as identified by the NEC) are affiliated to the EFBWW. In Cyprus, Estonia, Greece, Latvia, Lithuania and Portugal, the most important trade union is not a EFBWW member.

In those countries where the cumulative sector-level trade union density is available, it varies from 79% in Ireland and 67% in Sweden to 1% in Bulgaria, Estonia, Hungary and Poland, and 0% in Lithuania, according to the EU-LFS. The estimations provided by the NEC are in line with the EU-LFS data, except those for Finland, Greece, Slovenia and Sweden, for which the NEC estimates considerably lower trade union density rates in the sector. In the countries for which data were available, the average cumulative trade union density rate equals 15% (NEC; 21 countries) or 11% (EU-LFS; 25 countries). The relatively low trade union density rate in the sector across the countries is to some extent explained by high prevalence of low-skilled workforce and non-standard, often unregistered, work and migrant work.

The majority of employer organisations and business associations (57 of 93 from all EU Member States) cover at least some part of all three subsectors in the construction sector and they can have different modes of organising their members (direct membership of individual companies, membership on a regional basis, membership on a subsectoral basis). Around half of the organisations also represent employers and businesses from other sectors of the economy, such as manufacturing of building materials, metal engineering or recycling activities. Most commonly, employer organisations and business associations organise companies with a workforce of 10–49 employees (at least 82); nevertheless, the majority of the organisations cover all company sizes (at least 59 of 93 organisations).

Since around one-third of employer organisations and business associations lack data on their organisational density, comparative data on cumulative employer organisation density in the construction sector per country are not available. At individual level, the data on employer organisations' and business associations' sectoral density, measured as the ratio of employees employed by member companies to the total number of employees in the construction sector, shows that 28% of organisations with data available have a sectoral density of 20% or more, and 48% of organisations a density of 10% or less. According to the NEC's estimates of the relative importance of employer organisations, in 24 countries the most important organisations among large companies and/or SMEs are affiliated to the FIEC. The EBC affiliates the most important construction sector organisations in 10 Member States – organising mostly craftspeople, microfirms and SMEs, but also some organisations with relative importance among large companies (for example, in Latvia or Spain). The Spanish organisation the CNC is affiliated to both the FIEC and the EBC.

Detailed analyses of the representativeness of national trade unions and employer organisations among the three largest companies in each Member State can be found in Table 16. For the different size groups, the analyses of the national sectoral trade unions are given in Tables 20 and 21; for the national sectoral employer organisations, these are given in Tables 28, 29, 31 and 32.

Collective bargaining

At least one trade union in each Member State is involved in single-employer and/or multi-employer collective bargaining. The vast majority of trade unions engage in multi-employer sectoral collective bargaining (64 of 77) and in company-level collective bargaining (62 of 77), and 69% of them are involved in both single-employer and multi-employer bargaining. Some unions only participate in multi-employer bargaining (14%), and nine trade unions (12%) are only involved in single-employer bargaining. Almost one-third of trade unions (23 of 77) from 10 countries (Belgium, Croatia, Cyprus, France, Hungary, Italy, Latvia, Luxembourg, the Netherlands, Spain) are signatory parties to collective agreements that cover at least 90% of the sectoral workforce in their respective countries. Overall, due to the structure of the workforce in the construction sector, collective agreements tend to cover blue-collar workers and standard employment relationships more often than white-collar workers, management and non-standard workers from all company sizes.

Similarly, in 24 Member States (excluding Estonia, Lithuania and Poland) at least one employer organisation is involved in sector-level collective bargaining; 16 of 93 organisations (or 17%), mostly from central and eastern Europe, are not involved in any form of collective bargaining. Multi-employer bargaining is often complementary to single-employer bargaining: 10 organisations (or 11%) sign both multi-employer and single-employer collective agreements, 66 employer organisations (or 71%) conclude only multi-employer agreements and 1 employer organisation concludes only single-employer agreements (MEA of Malta).

The estimate of the collective bargaining coverage rate for the whole sector in each country shows that, in the majority of Member States, the sector-level bargaining coverage rate is 50% or more. In 13 countries, the coverage rate is exceptionally high, at between 95% and 100% (Austria, Belgium, Croatia, Cyprus, France, Germany, Hungary, Italy, Latvia, Luxembourg, the Netherlands, Spain, Sweden); in 3 countries it is between 75% and 94% (Finland, Portugal, Slovakia) and in 5 countries it is between 50% and 74% (Czechia, Denmark, Ireland, Romania, Slovenia). In the remaining countries for which information was available (Bulgaria, Greece, Lithuania, Malta, Poland), the coverage rate is low, between 1% and 24%.

Social dialogue and consultation

The majority of trade unions are also involved in bipartite or tripartite social dialogue with employer organisations and/or governments, either regularly or on an ad hoc basis. At least 64 employer organisations and business associations participate in bipartite or tripartite social dialogue structures. Overall, 42 tripartite or bipartite bodies active in the construction sector from 19 Member States were identified; however, some of them may cover a wider range of issues from other sectors too.

At least 35 trade unions and at least 46 employer organisations and business associations are involved in 24 paritarian organisations (plus one non-paritarian organisation) across 12 countries. These not-for-profit organisations are jointly established and managed by unions and employers, usually within the framework of collective agreements, and address issues related to social and health protection. Six paritarian organisations (in Austria, Germany, Ireland, Italy, Romania and Spain) are affiliated to the AEIP.

European level of interest representation

The EFBWW, affiliated to the ETUC, organises the national trade union organisations not only from the construction sector, but also from the building materials industry, the wood and furniture industry and the forestry industry. The majority of trade union organisations (50 of 77; 65%) from 24 countries are affiliated to the EFBWW. In 21 countries, the EFBWW affiliates the most important trade union organisation in the construction sector in terms of membership. In Estonia and Lithuania, there are no construction sector trade unions affiliated to the EFBWW. The Greek Federation of Workers and Employees in Cement Industry is a member of the EFBWW. It can be assumed that this organisation has members in the construction sector, although this could not be confirmed within the scope of this study. For Cyprus, Latvia and Portugal, the EFBWW has a sectoral trade union affiliated, although it is not the trade union with the most members in the sector.

The trade unions affiliated to the EFBWW organise most types of sectoral employees in all types of activities in almost all countries covered. Only in Malta is the membership domain of the affiliated trade union limited to specialised construction activities (NACE 43), not covering construction of buildings and civil engineering. In terms of company sizes, microfirms (fewer than 10 employees) are not organised by the affiliated trade unions from Poland, Romania and Slovakia. In Poland and Slovakia, SMEs with between 10 and 49 employees are not organised by the trade union affiliated to the EFBWW.

All EFBWW affiliates are involved in collective bargaining.

In addition to being affiliated to the EFBWW, several trade unions are affiliated to other organisations at European level, namely IndustriAll (11), EPSU (6), UNI Europa (5), EFFAT (3), ETF (2) and others with one member each. This does, however, point to multisectoralism at national level. The affiliation to these other European organisations appears to be for members in other sectors, not for construction sector trade union members.

Consequently, the EFBWW is confirmed as **the only** representative European trade union organisation for the construction sector.

The FIEC represents 33 of the 93 employer organisations and business associations analysed (35%), and these are mostly one of the three largest sector-related employer organisations and business associations (in 23 countries) and represent the largest employers in terms of their workforce (in 24 countries). The FIEC does not have an affiliated organisation in Latvia, Malta or Poland. There was a member in Latvia until the end of 2021, but it stopped its membership of the FIEC in 2022. In Slovenia, the FIEC has a member organisation, but this organisation does not have any of the largest three companies affiliated to it. In the other 23 Member States, the employer organisation with one of the three largest companies affiliated to it is affiliated to the FIEC. In Slovenia, there is a member organisation, but this does not organise microfirms. In all 23 other Member States covered by the FIEC, the employers of microfirms are represented by the FIEC in the ESSDC.

Through its affiliates, the FIEC covers either the entire construction sector or large parts of it in all Member States (cumulative sector coverage). FIEC affiliates make up 38% of all employer organisations and business associations involved in collective bargaining.

Several employer organisations and business associations are affiliated to other European associations, among which the one with the most members is the EBC, representing 18 associations in 15 countries, organising craftspeople, microfirms and SMEs. The EBC does not have affiliates in

Bulgaria, Cyprus, Czechia, Denmark, Estonia, Germany, Greece, Finland, Lithuania, Malta, Portugal or Sweden. However, although the vast majority of the EBC's affiliates are microfirms, in most countries (13 of 15) it affiliates members of all company sizes up to 249 employees. The most important organisation (in terms of membership) in Spain is affiliated to both the FIEC and the EBC. The most important organisation in terms of the representativeness of microfirms in France (the country with the most companies in the EU) is a member of the EBC. Other affiliations include the EIC (seven direct and two indirect affiliations), the Building Engineering Services Association, GCP Europe (five direct affiliations), SMEunited (five direct affiliations), the Electrical Contractors Association, EuropeOn (three direct affiliations), the UEG and several affiliations to other European associations. Consequently, the FIEC and the EBC are not the only European associations with national sectoral employer organisations affiliated to them.

The EBC has the employer organisation with the largest membership domain in Spain affiliated to it – namely, the CNC, which is also a member of the FIEC. All together, the EBC has affiliated organisations in 15 Member States. Among the countries with the largest sectoral workforces, the EBC has no member organisation in Germany or Sweden. Except for the CNC in Spain, none of the EBC member organisations are also affiliated to the FIEC.

In conclusion, the FIEC can be considered the **most representative** European employer organisation in the construction sector. The EBC can be considered an organisation with some additional representativeness that is not yet represented in the ESSDC. In the category of microfirms with 0–9 employees, the EBC's membership strength is higher in terms of the number of companies, and even more so if self-employed workers without employees are included. On its own, the FIEC can be considered the most representative of the employers in the largest companies, SMEs and microfirms with employees in the sector. Together, the FIEC and the EBC organise 13.4% of all construction companies and 81.8% of all companies affiliated to a national employer organisation.

References

All published representativeness studies can be found on the Eurofound website:

<https://www.eurofound.europa.eu/observatories/eurwork/representativeness-studies>

Ahrne, G. (1990), *Agency and organization: Towards an organizational theory of society*, Sage, London.

Atkin International (1993), *Secteur, strategic study on the construction sector: Final report: Strategies for the construction sector*, Commission of the European Communities, Directorate-General Industry.

Druker, J. and Dupre, I. (1998), 'The Posting of Workers Directive and employment regulation in the European construction industry', *European Journal of Industrial Relations*, Vol. 4, No. 3, pp. 309–330.

EFBWW and FIEC (2020), *EFBWW and FIEC joint recommendations to counteract the negative impact and consequences of the current COVID-19 crisis for the construction industry*, Brussels, 21 April 2020.

EFBWW and FIEC (2021), *Joint statement of the European social partners of the construction industry (FIEC–EFBWW) on third country national workers and companies in the EU construction market*, Brussels, 9 June 2021.

EU-OSHA (European Agency for Safety and Health at Work) (2023), *Occupational safety and health in Europe: State and trends 2023*, Publications Office of the European Union, Luxembourg.

European Commission (1998), 'Commission Decision of 20 May 1998 on the establishment of sectoral dialogue committees promoting the dialogue between the social partners at European level (98/500/EC)', *Official Journal of the European Union*, L225, 12 August.

European Commission (undated), *Cross-industry and sectoral social dialogue – Construction*, web page, accessed 15 August 2024.

Lubanski, N. (2000), 'Moving closer together – Trade union Europeanisation in the construction sector', *Transfer: European Review of Labour and Research*, Vol. 6, No. 1, pp. 103–109.

Lubanski, N. and Sörries, B. (1997), 'Internationalisation of the German construction industry – keener competition leads to pressure on the collective bargaining system', *CLR News*, No. 1, pp. 2–19.

Perin, E. and Léonard, E. (2011), 'European sectoral social dialogue and national social partners', *Transfer: European Review of Labour and Research*, Vol. 17, No. 2, pp. 159–168.

Traxler, Franz (2004), 'The metamorphoses of corporatism: From classical to lean patterns', *European Journal of Political Research*, Vol. 43, No. 4, pp. 571–598.

UNI Europa (2011), UNI Europa statutes and conference standing orders, Brussels.

Annexes

Annex 1: List of national trade unions

Member State	Abbreviation	Full name in original language	Full name in English
AT	GBH	Gewerkschaft Bau-Holz	Union of Construction and Woodworkers
AT	GPA	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	Union of Salaried Employees, Graphical Workers and Journalists
AT	PRO-GE	Produktionsgewerkschaft	Production Trade Union
BE	ABVV-FGTB ACCG	Algemene Centrale/Centrale Générale	General Labour Federation of Belgium
BE	ACLVB-CGSLB	Algemene Centrale der Liberale Vakbonden van België /Centrale Générale des Syndicats Libéraux de Belgique	General Liberal Trade Union of Belgium
BE	ACV-CSC BIE	Algemeen Christelijk Vakverbond bouw – industrie & energie/Confédération des Syndicats chrétiens bâtiment – industrie & énergie	Confederation of Christian Building Unions – Industry & Energy
BE	ACV Puls	Algemeen Christelijk Vakverbond Puls	Confederation of Christian Building Unions Pulse
BG	FCIW	Федерация 'Строителство, индустрия и водоснабдяване'	Construction, Industry and Water Supply Federation
BG	FICTU	Федерация на независимите строителни синдикати	Federation of Independent Construction Trade Unions
CY	OBIEK-SEK	Cyprus Federation of Industrial Workers	Cyprus Federation of Industrial Workers
CY	OIKODOMOI-PEO	Cyprus Building, Wood, Mine and General Workers Trade Union	Cyprus Building, Wood, Mine and General Workers Trade Union
CY	OOIM-SEK	Cyprus Federation of Builders, Miners and Relevant Professions	Cyprus Federation of Builders, Miners and Relevant Professions
CY	SEMMIK-PEO	Cyprus Metal Workers, Mechanics & Electricians Trade Union	Cyprus Metal Workers, Mechanics & Electricians Trade Union
CZ	OS STAVBA	Odborový svaz Stavba České republiky	Trade Union of Building Workers of the Czech Republic
DE	IG BAU	Industriegewerkschaft Bauen-Agrar-Umwelt	Trade Union for Construction, Agriculture and Environment
DK	3F	Fagligt Fælles Forbund	United Federation of Danish Workers
DK	Blik & Rør	Blik og Rørarbejderforbundet	Danish Union of Plumbers and Pipefitters
DK	DANSK METAL	Dansk Metalarbejderforbund	Danish Metalworkers' Union
DK	DEF	Dansk El-Forbund	Danish Union of Electricians
DK	MFD	Malerforbundet	Danish Painters' Union
EE	EEAÜL	Eesti Energeetikatöötajate Ametiühingute Liit	Association of Estonian Energy Workers' Trade Unions
EE	ETTA	Eesti Transpordi- ja Teetöötajate Ametiühing	Estonian Transport and Road Workers' Trade Union
EL	OHE	Omospondia Ilektrologon Elladas	Federation of Electricians of Greece
EL	OHMEE	Omospondia Hiriston Mihanimatou Ergou Elladas	Hellenic Federation of Site Machine Operators
EL	OOSEE	Omospondia Oikodomon kai Synafon Epagelmatou Elladas	Greek Federation of Builders and Related Professions
ES	CCOO del Hábitat	Comisiones Obreras del Hábitat	Habitat Workers' Commissions
ES	ELA	Eusko Langileen Alkartasuna – Industria eta eraikuntza	Solidarity of Basque Workers – Industry and buildings
ES	UGT-FICA	Unión General de Trabajadores – Federación de Industria, Construcción y Agricultura	General Union of Workers – Industry, Construction and Agriculture Federation
FI	FEWU	Sähköalojen ammattiliitto ry	Finnish Electrical Workers Union
FI	JHL	Julkisten ja hyvinvointialojen liitto	Trade Union for the Public and Welfare Sectors
FI	Pro	Ammattiliitto Pro	Trade Union Pro

Representativeness of the European social partner organisations: Construction sector

Member State	Abbreviation	Full name in original language	Full name in English
FI	RL	Rakennusliitto	Finnish Construction Trade Union
FI	YTN	Ylemmät toimihenkilöt	Federation of Professional and Managerial Staff
FR	BATI-MAT-TP CFTC	Fédération BATI-MAT-TP CFTC	BATI-MAT-TP Federation
FR	CFE-CGC BTP	Syndicat national des Cadres, Techniciens, Agents de Maîtrise et assimilés, des industries du Bâtiment, des Travaux Publics et des activités annexes et connexes	National Union of Managers and Technicians of the Building, Civil Engineering and Associated Activities Industries
FR	FNCB-CFDT	Fédération nationale Construction et bois – Confédération française démocratique du travail	National Federation of Construction and Wood – French Democratic Confederation of Labour
FR	FNSCBA-CGT	Fédération Nationale des Salariés de la Construction, Bois et Ameublement – CGT	National Federation of Employees of the Construction, Wood and Furniture Sectors
FR	FO Construction	Fédération Générale Force Ouvrière (La force syndicale) Bâtiment, Travaux Publics, Céramique, Matériaux de Construction et Carrières, Papier, Carton	General Federation Labour Force FOR Building, Public Works, Ceramics, Construction Materials and Quarries, Paper, Cardboard
FR	UNSA I&C	Union Fédérale de l'Industrie & de la Construction de l'UNSA	UNSA Federal Union of Industry and Construction
HR	NCS	Nezavisni cestarski sindikat	Independent Road Workers Trade Union
HR	SGH	Sindikat graditeljstva Hrvatske	Trade Union of the Construction Industry of Croatia
HU	EFEDOSZSZ	Építő-, Fa-, és Építőanyagipari Dolgozók Szakszervezeteinek Szövetsége	Federation of Building, Wood and Building Materials Workers' Unions
IE	BATU	Building and Allied Trades Union	Building and Allied Trades Union
IE	Connect	Connect	Connect
IE	OPATSI	Operative Plasterers and Allied Trades Society of Ireland	Operative Plasterers and Allied Trades Society of Ireland
IE	SIPTU	Services Industrial Professional Technical Union	Services Industrial Professional Technical Union
IE	Unite	Unite the Union	Unite the Union
IT	FENEAL-UIL	Federazione Nazionale Lavoratori Edili Affini e del Legno	National Federation of Construction-related and Wood Workers
IT	FILCA-CISL	Federazione Italiana Lavoratori delle Costruzioni e Affini	Italian Federation of Construction and Related Workers
IT	FILLEA-CGIL	Federazione Italiana dei Lavoratori del Legno, dell'Edilizia, delle industrie Affini ed estrattive	Italian Federation of Wood, Construction and Related Industries' Workers
LT	LPPSF	Lietuvos pramonės profesinių sąjungų federacija	Lithuanian Federation of Industrial Trade Unions
LT	SPS	Statybininkų profesinė sąjunga 'Solidarumas'	Builders' Trade Union 'Solidarumas'
LU	LCGB-CA	LCGB construction et artisanat	LCGB Construction and Crafts
LU	SBABCM-OGBL	Syndicat bâtiment, artisanat du bâtiment et constructions métalliques de l'OGB-L	Building, Building Crafts and Metal Construction Trade Union of the OGB-L
LV	LBNA	Latvijas Būvniecības nozares arodbiedrība	Latvian Building Sector Trade Union
LV	LCDA	Latvijas Ceļu darbinieku arodbiedrība	Latvian Road Workers Trade Union
MT	GWU	General Workers Union – Metal and Construction Section	General Workers Union – Metal and Construction Section
NL	CNV Vakmensen	Christelijk Nationaal Vakverbond Vakmensen	Christian National Trade Union of Professionals
NL	FNV	Federatie Nederlandse Vakbeweging	Federation of Dutch Trade Unions
NL	LBV	Landelijke Belangen Vereniging	National Interest Union
PL	SBiPD NSZZ Solidarnosc	Sekretariat Budownictwa i Przemysłu Drzewnego NSZZ 'Solidarność'	Secretariat of the Construction and Woodworking Industry of the NSZZ 'Solidarność'

Representativeness of the European social partner organisations: Construction sector

Member State	Abbreviation	Full name in original language	Full name in English
PL	ZZ Budowlani	Związek Zawodowy 'Budowlani'	Construction Trade Union
PT	FENTCOP	Sindicato Nacional dos Transportes Comunicações e Obras Públicas	National Transport, Communications and Public Works Union
PT	FETESE	Federação dos Sindicatos da Indústria e Serviços	Federation of Trade Unions of Industry and Services
PT	FEVICOM	Federação Portuguesa dos Sindicatos da Construção, Cerâmica e Vidro	Portuguese Federation of Construction, Ceramics and Glass Trade Unions
PT	SETACOP	Sindicato da Construção, Obras Públicas e Serviços Afins e outros	Union of Construction, Public Works and Related Services and Others
PT	SQTD	Sindicato dos Quadros e Técnicos de Desenho	Union of Technical Draughtsmen
RO	FGS Familia	Federația Generală a Sindicatelor Familia	General Trade Unions Federation Familia
SE	Byggnads	Svenska Byggarbetsareföbundet	Swedish Construction Workers Union
SE	Elektrikerna	Svenska Elektrikerförbundet	Swedish Electricians' Union
SE	Ledarna	Ledarna	Ledarna
SE	Malarna	Svenska Målareförbundet	Swedish Painters Union
SE	SEKO	Service- och kommunikationsfacket	Service and Communication Union
SE	Sveriges ingenjörer	Sveriges ingenjörer	Engineers of Sweden
SE	Unionen	Unionen	Unionen
SI	SCGS	Sindikat cestnega gospodarstva Slovenije	Slovenian Road Trade Union
SI	SDGD	Sindikat delavcev gradbenih dejavnosti Slovenije	Trade Union of Construction Industry Workers of Slovenia
SK	IOZ	Integrovaný odborový zväz	Integrated Trade Union Association

Annex 2: List of national sectoral employer organisations

Member State	Abbreviation	Full name in original language	Full name in English
AT	BIB	Bundesinnung Bau	Federal Association of Construction
AT	BIBHG	Bundesinnung der Bauhilfsgewerbe	Federal Association of Construction-support Activities
AT	BIDGS	Bundesinnung der Dachdecker, Glaser, Spengler	Federal Association of Roofers, Glaziers, Tinsmiths
AT	BIEGAK	Bundesinnung der Elektro-, Gebäude-, Alarm- und Kommunikationstechniker	Federal Association of Electrical, Buildings, Alarm and Communications Technicians
AT	BIHB	Bundesinnung Holzbau	Federal Association of Timber Construction
AT	BIHPFK	Bundesinnung der Hafner, Platten-, und Fliesenleger und Keramiker	Federal Association of Stove-Fitters, Pavers, Tilers and Ceramists
AT	BIM	Bundesinnung der Metalltechniker	Federal Association of Metal Engineers
AT	BIMT	Bundesinnung der Maler und Tapezierer	Federal Association of Painters and Upholsterers
AT	BISHL	Bundesinnung der Sanitär-, Heizungs- und Lüftungstechniker	Federal Association of Sanitary, Heating and Ventilation Engineers
AT	BITHG	Bundesinnung der Tischler und der Holzgestaltenden Gewerbe	Federal Association of Carpenters and Wood-shaping Trades
AT	FEEI	Fachverband der Elektro- und Elektronikindustrie	Federal Association of the Electrical and Electronics Industry
AT	FVBI	Fachverband der Bauindustrie	Federal Association of the Construction Industry
BE	Bouwunie	Bouwunie	Construction Union
BE	Confederatie Bouw	Confederatie Bouw/Confédération Construction	Construction Confederation
BE	FEMA	Nationale Unie van de Handelaren in Bouwmaterialen	National Union of Construction Material Vendors

Representativeness of the European social partner organisations: Construction sector

Member State	Abbreviation	Full name in original language	Full name in English
BG	BCC	Камара на строителите в България	Bulgarian Construction Chamber
CY	OSEOK	Ομοσπονδία Συνδέσμων Εργολάβων Οικοδομών Κύπρου	Cyprus Building Contractors Association
CZ	SPS	Svaz podnikatelů ve stavebnictví	Association of Building Entrepreneurs of the Czech Republic
DE	BV FARBE	Bundesverband Farbe Gestaltung und Bautenschutz	Federal Association for the Painting and Varnishing Trade
DE	DA	Deutscher Abbruchverband	German Demolition Association
DE	HDB	Hauptverband der Deutschen Bauindustrie	German Construction Industry Federation
DE	ZDB	Zentralverband des Deutschen Baugewerbes	German Construction Confederation
DE	ZVDH	Zentralverband des Deutschen Dachdeckerhandwerks	German Roofing Contractors Association
DE	ZVEH	Zentralverband der Deutschen Elektro- und Informationshandwerke	Federal Association of the Electrical and IT-related Crafts
DE	ZVSHK	Zentralverband Sanitär Heizung Klima	German Sanitation, Heating and Air Conditioning Association
DK	DI Byggeri	DI Byggeri	Danish Construction Federation
DK	TEKNIQ	TEKNIQ Arbejdsgiverne	Danish Mechanical and Electrical Contractors Association
EE	EEEL	Eesti Ehitusettevõtjate Liit	Estonian Association of Construction Entrepreneurs
EL	PEDMEDE	Panellinia Enosi Diplomatouhon Mihanikon Ergolipton Dimosion Ergon	Panhellenic Association of Engineers Contractors of Public Works
EL	POSEH	Πανελλήνια Ομοσπονδία Σωματείων Εργοληπτών Ηλεκτρολόγων	Panhellenic Federation of Unions of Electrical Contractors
EL	SATE	Panellinos Sindesmos Tehnikon Etairion	Association of Greek Contracting Companies
ES	CNC	Confederación Nacional de la Construcción	National Confederation of Construction
FI	GCF	Talonrakennusteollisuus ry	General Contractors of Finland
FI	INFRA	INFRA ry	Infra Contractors Association in Finland
FI	LVI TU	LVI-Tekniset Urakoitsijat LVI-TU ry	Finnish Association of HVAC Technical Contractors
FI	MTA	Maaseudun työnantajaliitto	Federation of Agricultural Employers
FI	Palta	Palvelualan työntajat	Service Sector Employers
FI	RT	Rakennusteollisuus RT	Confederation of Finnish Construction Industries
FI	STTA	Sähkötekniiset työntajat	Electrical Employers' Association
FI	TAFFEMC	Koneyrittäjät	Trade Association of Finnish Forestry and Earth Moving Contractors
FR	CAPEB	Confédération de l'artisanat et des petites entreprises du bâtiment	Confederation of Crafts and Small Building Enterprises
FR	FFB	Fédération française du bâtiment	French Building Federation
FR	FNTP	Fédération Nationale des Travaux Publics	National Federation of civil engineering
FR	SNSO	Syndicat National des entreprises du Second-Œuvre	National Union of Sub-trade Enterprises
HR	HOK	Hrvatska obrtnička komora	Croatian Chamber of Trades and Crafts
HR	HUP-UPG	Hrvatska udruga poslodavaca- Udruga poslodavaca graditeljstva	Croatian Employers' Association- Construction Employers' Association (CEA CEA)
HU	EVOSZ	Építési Vállalkozók Országos Szakszövetsége	National Federation of Hungarian Building Contractors
HU	IPOSZ	Ipartestületek Országos Szövetsége	Hungarian Association of Craftsmen's Corporations
IE	CIF	Construction Industry Federation	Construction Industry Federation
IE	NGMC	National Guild of Master Craftsmen	National Guild of Master Craftsmen

Representativeness of the European social partner organisations: Construction sector

Member State	Abbreviation	Full name in original language	Full name in English
IT	AGCI - Produzione e Lavoro	Associazione Generale Cooperative Italiane – Produzione e Lavoro	General Association of Italian Cooperatives – Production and Work
IT	ANAEP	Associazione Nazionale Artigiani dell’Edilizia, dei Decoratori, dei Pittori e Attività Affini – Confartigianato	National Association of Construction Craftsmen, Decorators, Painters and Related Activities – Confartigianato
IT	ANCE	Associazione Nazionale Costruttori Edili	Italian Contractors’ Association
IT	ANIEM - Confapi	Unione Nazionale Imprese Edili Manifatturiere e Settori Affini – Confapi	National Union of Manufacturing Construction Companies and Related Sectors – Confapi
IT	CLAAI	Confederazione Libere Associazioni Artigiane Italiane	Confederation of Free Italian Craft Associations
IT	CNA - Costruzioni	Confederazione Nazionale dell’Artigianato e della Piccola e Media Impresa - Costruzioni	National Confederation of Crafts and Small and Medium Enterprises - Construction
IT	Confcooperative - Lavoro e Servizi	Federazione Nazionale delle Cooperative di Produzione e Lavoro, Artigiane e dei Servizi	National Federation of Production and Labour, Artisans and Services Cooperatives
IT	FIAE - Casartigiani	Confederazione Autonoma Sindacati Artigiani	Autonomous Confederation of Artisan Trade Unions
IT	Legacoop Produzione e Servizi	Legacoop Produzione e Servizi	Legacoop Production and Services
LT	LSA	Lietuvos statybininkų asociacija	Lithuanian Constructors’ Association
LU	FDA	Fédération des entreprises luxembourgeoises de construction et de génie civil	Federation of Luxembourg construction and civil engineering companies
LU	GEBTP	Groupement des entrepreneurs du bâtiment et des travaux publics	Group of building and public works contractors
LV	LBA	Latvijas Būvnieku asociācija	Latvian Builders Association
LV	LBP	Latvijas Būvuzņēmēju partnerība	Partnership of Latvian Constructors
LV	LCBB	Latvijas Ceļu būvētājs	Latvian Association of Road Builders
MT	MEA	Malta Developers Association	Malta Developers Association
NL	AfNL	Aannemersfederatie Nederland	Federation of Dutch Contractors
NL	Bouwend NL	Bouwend Nederland	Construction Netherlands
NL	OnderhoudNL	Onderhoud Nederland	Maintenance Netherlands
NL	Techniek Nederland	Techniek Nederland	Technics Netherlands
PL	KBiN	Konfederacja Budownictwa i Nieruchomości	Construction and Real Estate Confederation
PL	PZPB	Polski Związek Pracodawców Budownictwa	Polish Federation of Construction Industry Employers
PL	ZRP	Ogólnopolska Komisja Rzemiosł Budowlanych i Producentów Materiałów Budowlanych Związku Rzemiosła Polskiego	National Commission of Construction Crafts and Building Materials Manufacturers of the Polish Craft Association
PT	AECOPS	Associação de Empresas de Construção e Obras Públicas e Serviços	Association of Construction and Public Works and Services Companies
PT	AICCOPN	Associação dos Industriais da Construção Civil e Obras Públicas	Association of Civil Construction and Public Works Industries
PT	AICE	Associação dos Industriais da Construção de Edifícios	Association of Building Construction Industries
PT	FEPICOP	Federação Portuguesa da Indústria da Construção e Obras Públicas	Portuguese Federation of the Construction and Public Works Industry
RO	ARACO	Asociația Română a Antreprenorilor de Construcții	Romanian Association of Building Contractors
RO	FPSC	Federatia Patronatelor Societatilor din Constructii	Construction Employers Federation
RO	UNPR	Uniunea Națională a Patronatului Român	National Union of Romanian Employers
RO	Zepher Cluster	Zepher Cluster	Zepher Cluster

Representativeness of the European social partner organisations: Construction sector

Member State	Abbreviation	Full name in original language	Full name in English
SE	Byggföretagen	Byggföretagen	Swedish Construction Federation
SE	GBF	Glasbranschföreningen	Swedish Federation of Glazing Contractors
SE	IN	Installatörsföretagen	Swedish Installation Federation
SE	ME	Maskinentreprenörerna	Association of Heavy Equipment Contractors
SE	MiS	Måleriföretagen	Employer Organisation for Professional Painting
SE	P&V	Plåt & Ventföretagen	Confederation of Sheet Metal and Ventilation Enterprises
SI	GZS – CCBMIS	Gospodarska zbornica Slovenije – Zbornica gradbeništva in industrije gradbenega materiala	Chamber of Commerce of Slovenia – Chamber of Construction and Building Materials Industry
SI	OZS	Obrtno-podjetniška zbornica Slovenije	Chamber of Craft and Small Business of Slovenia
SI	ZDS	Združenje delodajalcev Slovenije – Sekcija za gradbeništvo	Association of Employers of Slovenia – Construction Section
SK	SZZ	Slovenský živnostenský zväz	Slovak Craft Industry Federation
SK	ZSPS	Zväz stavebných podnikateľov Slovenska	Association of Construction Entrepreneurs of Slovakia

Annex 3: Network of Eurofound Correspondents

Table 62: National correspondents who have contributed to this study

Country	Correspondent(s)	Organisation
AT	Georg Adam	Working Life Research Centre (FORBA)
BE	Dries Van Herreweghe	HIVA – Research Institute for Work and Society, KU Leuven
BG	Tsvetomila Ivanova	Institute of Social and Trade Union Research (ISTUR) and Balkan Institute for Labour and Social Policy
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs
CY	Pavlos Kalosinatos and Alexandros Perdikes	Cyprus Labour Institute of the Pancyprian Federation of Labour (INEK-PEO)
DE	Sandra Vogel	German Economic Institute
DK	Maria Hansen	Employment Relations Research Centre (FAOS), University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Penny Georgiadou	Labour Institute of the General Confederation of Greek Workers (INE GSEE)
ES	Alejandro Godino	Institute for Labour Studies, Autonomous University of Barcelona
FI	Amanda Kinnunen	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejakovic and Irena Klemencic	Institute of Public Finance (IPF)
HU	Nóra Krokovay and Szilvia Borbély	Kopint-Tárki Institute for Economic Research
IE	Colman Higgins	IRN Publishing
IT	Lisa Dorigatti	Department of Social and Political Sciences, University of Milan
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
LV	Krišs Karnītis	EPC Ltd
MT	Christine Garzia	University of Malta
NL	Eelco Tammens and Paul Vroonhof	Panteia BV
PL	Maciej Pańków	Foundation Institute of Public Affairs
PT	Reinhard Naumann	Friedrich-Ebert-Stiftung (Lisbon)
RO	Victoria Stoiciu and Nicoleta Voicu	European Institute of Romania
SE	Nils Brandsma	Oxford Research AB
SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Ludovit Cziria	Institute for Labour and Family Research

Getting in touch with the EU

In person

All over the European Union there are hundreds of Europe Direct centres. You can find the address of the centre nearest you online: https://european-union.europa.eu/contact-eu_en

On the phone or by email

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

- by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls)
- at the following standard number: +32 22999696
- via the following form: https://european-union.europa.eu/contact-eu/write-us_en

Finding information about the EU

Online

Information about the European Union in all the official languages of the EU is available on the Europa website: <https://europa.eu>

EU publications

You can view or order EU publications at: <https://op.europa.eu/publications>. Multiple copies of free publications can be obtained by contacting Europe Direct or your local documentation centre: https://european-union.europa.eu/contact-eu/meet-us_en.

EU law and related documents

For access to legal information from the EU, including all EU law since 1951 in all the official language versions, go to EUR-Lex: <https://eur-lex.europa.eu>

Open data from the EU

The portal <https://data.europa.eu> provides access to open datasets from the EU institutions, bodies and agencies. These can be downloaded and reused for free, for both commercial and non-commercial purposes. The portal also provides access to a wealth of datasets from European countries.

This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the construction sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements.

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study assesses the representativeness of the European Construction Industry Federation (FIEC) (representing the employers in 24 Member States) and the European Federation of Building and Wood Workers (EFBWW) (representing the employees in 24 Member States) as European-level social partner organisations in the European sectoral social dialogue committee for the construction sector. In addition, the representativeness of the European Builders Confederation (EBC) (representing employers from small and medium-sized enterprises and craftspeople in 15 Member States) is analysed in this study.

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

