RESEARCH REPORT

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Graphical sector

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Eurofound

European Foundation for the Improvement of Living and Working Conditions

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DK	Denmark	**IT**	Italy	**SE**	Sweden
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EL	Greece	**LU**	Luxembourg	**SK**	Slovakia

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social actors – that is, the trade unions and employer organisations – in the graphical sector and to show how the national actors relate to the sector's European interest organisations for both workers and employers.

The impetus for this study, and for similar studies in other sectors, arises from the aim of the European Commission to identify the representative social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) and to be eligible for participation in European sectoral social dialogue committees (ESSDCs).

The report is divided into five parts: an introduction; Chapter 1, which gives an overview of the economic specificities and the employment trends in the graphical sector; Chapter 2, which sets out an analysis of the social partner organisations in the 27 EU Member States; Chapter 3, which analyses the representativeness of the relevant European organisations, in particular their membership composition and capacity to negotiate; and a conclusion.

This section presents the objectives of the study, along with a brief introduction to European-level social dialogue in the graphical sector and a brief introduction to the chosen methodology.

0.1. Objectives of the study

Representativeness studies are conducted for four reasons:

- the European Commission aims to confirm the representativeness of the social partner organisations consulted under Article 154 of the 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;
- this study can also offer guidance for future capacity-building initiatives.

Representativeness is defined by the European Commission decision of 20 May 1998 on the establishment of sectoral social dialogue committees promoting dialogue between the social partners at European level (Commission Decision 98/500/EC). For an organisation to be recognised as a representative EU social partner organisation, it must:

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

To accomplish its aims, this study first identifies the relevant national social partner organisations in the graphical sector, before analysing the structure of the sector's relevant European organisations, in particular their membership composition.

0.2. Historical background of the graphical industry social dialogue committee

As mentioned in the previous representativeness study for the graphical industry, published in 2016, the ESSDC for the graphical industry was established in 2013, making it one of the youngest ESSDCs. The European organisations participating in this committee are UNI Europa Graphical and Packaging and the European Federation for Print and Digital Communication (Intergraf). Since the establishment of the graphical ESSDC, UNI Europa Graphical and Packaging and Intergraf have produced several joint texts within the framework of social dialogue (Table 1).

Table 1: Joint texts of the European social partners participating in the graphical ESSDC

Date	**Topic of the joint opinion or agreements**
20 February 2024	Joint statement on the key priorities for the Packaging and Packaging Waste Regulation
2023	Joint statement by Intergraf, the Confederation of European Paper Industries (CEPI), UNI Europa Graphical and Packaging, the Federation of European Producers of Envelopes and Light Packaging and industriAll Europe – ‘digital by default’ or ‘digital only’ approaches in European legislation are not neutral
February 2022	Joint statement – Comments to the ongoing review process of the 2006/42/EC Machinery Directive
21 March 2020	Joint statement on the COVID-19 crisis
21 October 2019	Print is vital for the future of reading – Intergraf and UNI Europa Graphical and Packaging joint statement
17 September 2018	Joint statement on skills and training in the graphical industry
18 May 2015	Joint letter on the better regulation agenda
1 May 2015	Joint statement – European Timber Regulation
8 May 2013	Rules of procedures – graphical industry

Source: European Commission’s social dialogue texts database; checked in August 2025.

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity. These criteria will be defined successively in this section.

Sector-relatedness

Sector-relatedness means the demarcation of the graphical sector in agreement with the social partners and the European Commission. The analysis of the ways that trade unions and employer organisations relate to the sector must include the extent to which their membership domains cover all types of workers in all types of companies in all types of activities in the sector. How the sector is defined is crucial for the assessment of sector-relatedness.

Every sector is demarcated in terms of the general industrial classification of economic activities within the European Union (NACE) (Rev. 2) codes. All existing sectoral social dialogue committees have been demarcated with a NACE code, which defines the scope of economic activities covered by the committee. The NACE code to be applied in each sectoral representativeness study is confirmed by the European Commission after consultation with the social partners.

In this study, the graphical industry is demarcated as NACE (Rev. 2) code 18.1 – printing and service activities related to printing – which includes the activities listed in Table 2. Additionally, the same table lists other relevant activities included in the data collection exercise following the consultation of the European organisations participating in the ESSDC for the graphical industry, namely UNI Europa Graphical and Packaging and Intergraf. The European Foundation for the Improvement of Living and Working Conditions (Eurofound) national correspondents in each of the 27 Member States were asked to clarify which of the activities in Table 2 are considered part of the graphical sector in their Member State. Further details on the activities considered part of the graphical industry in each Member State are available in Section 1.1.

Table 2: Classification of activities in the graphical sector used in the current study

NACE code	Description
18.11: Printing of newspapers	Printing of other periodicals, appearing at least four times a week
18.12: Other printing	Printing of magazines and other periodicals, appearing less than four times a week; printing of books and brochures, music and music manuscripts, maps, atlases, posters, advertising catalogues, prospectuses and other printed advertising, postage stamps, taxation stamps, documents of title, cheques and other security papers, smart cards, albums, diaries, calendars and other commercial printed matter, personal stationery and other printed matter by letterpress, offset, photogravure, flexographic, screen printing and other printing presses, duplication machines, computer printers, embossers etc., including quick printing; printing directly onto textiles, plastic, glass, metal, wood and ceramics, printing on labels or tags (lithographic, gravure printing, flexographic printing, other) The material printed is typically copyrighted
	Large-format printing, although similar to printing of commercial materials (activities included in 18.12), can be considered a separate category because it uses very specific printing machines
18.13: Pre-press and pre-media services	Composing, typesetting, phototypesetting, pre-press data input including scanning and optical character recognition, electronic make-up; preparation of data files for multi-media (printing on paper, CD-ROM, internet) applications; plate-making services including image setting and plate setting (for the printing processes letterpress and offset); cylinder preparation: engraving or etching of cylinders for gravure printing; plate processing: 'computer to plate' CTP (also photopolymer plates); preparation of plates and dies for relief stamping or printing; preparation of: artistic works of technical character, such as preparation of lithographic stones and wood blocks; presentation media, e.g. overhead foils and other forms of presentation; sketches, layouts, dummies, etc.; production of proofs
18.14: Binding and related services	Trade binding, sample mounting and post press services in support of printing activities, e.g. trade binding and finishing of books, brochures, magazines, catalogues, etc., by folding, cutting and trimming, assembling, stitching, thread sewing, adhesive binding, cutting and cover laying, gluing, collating, basting, gold stamping; spiral binding and plastic wire binding; binding and finishing of printed paper or printed cardboard, by folding, stamping, drilling, punching, perforating, embossing, sticking, gluing, laminating; finishing services for

	CD-ROMs; mailing finishing services such as customisation, envelope preparation; other finishing activities such as die, sinking or stamping, Braille copying
Other relevant activities for the sector	
18.20: Reproduction of recorded media	Reproduction of recorded media is not traditionally a part of the graphical sector; however, it is sometimes included as a part of the sector. These activities include reproduction from master copies of gramophone records, compact discs and tapes with music or other sound recordings; reproduction from master copies of records, compact discs and tapes with motion pictures and other video recordings; reproduction from master copies of software and data on discs and tapes
No code	Printed electronics refers to activities such as the printing of batteries, flat switches, lights, sensors, displays, etc., and other conductive circuits. It is debated whether this is considered a printing activity or a manufacturing of electronics activity. The process is a printing process, but the ‘inks’ are conductive
58.1: Publishing of books, periodicals and other publishing activities	Activities of publishing books, newspapers, magazines and other periodicals, directories and mailing lists, and other works such as photos, engravings, postcards, timetables, forms, posters and reproductions of works of art
Partially 58.2: Software publishing	Online publishing (although not precisely defined by this NACE category)
Partially 62.0: Computer programming, consultancy and related activities	Production of video games (although not precisely defined by this NACE category). According to UNI Europa Graphical and Packaging, in some countries workers in the video game industry are being represented by the graphical trade unions (probably due to the similar skills / educational profile)

Note: Bold font used for activities included in the previous representativeness study for the graphical industry published in 2016.

Source: Author’s compilation based on NACE (Rev. 2) codes.

This study focuses on European and national organisations. **European organisations** are analysed using the top-down approach if they fulfil either or both of the following conditions:

- they are on the European Commission’s list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU;
- they participate in sector-related European social dialogue.

The European Commission may decide to include other EU sector-related organisations in the study, if relevant (e.g. if a sector-related organisation requests to be consulted, under Article 154 of the TFEU).

A **national organisation** is considered to be a relevant sector-related interest association if it meets both of the following criteria:

- the association’s domain relates to the sector;

- the association is either:
  - affiliated with a European-level organisation, which is analysed in the study within the top-down approach (independent of its involvement in collective bargaining); or
  - regularly involved in sector-related collective bargaining.

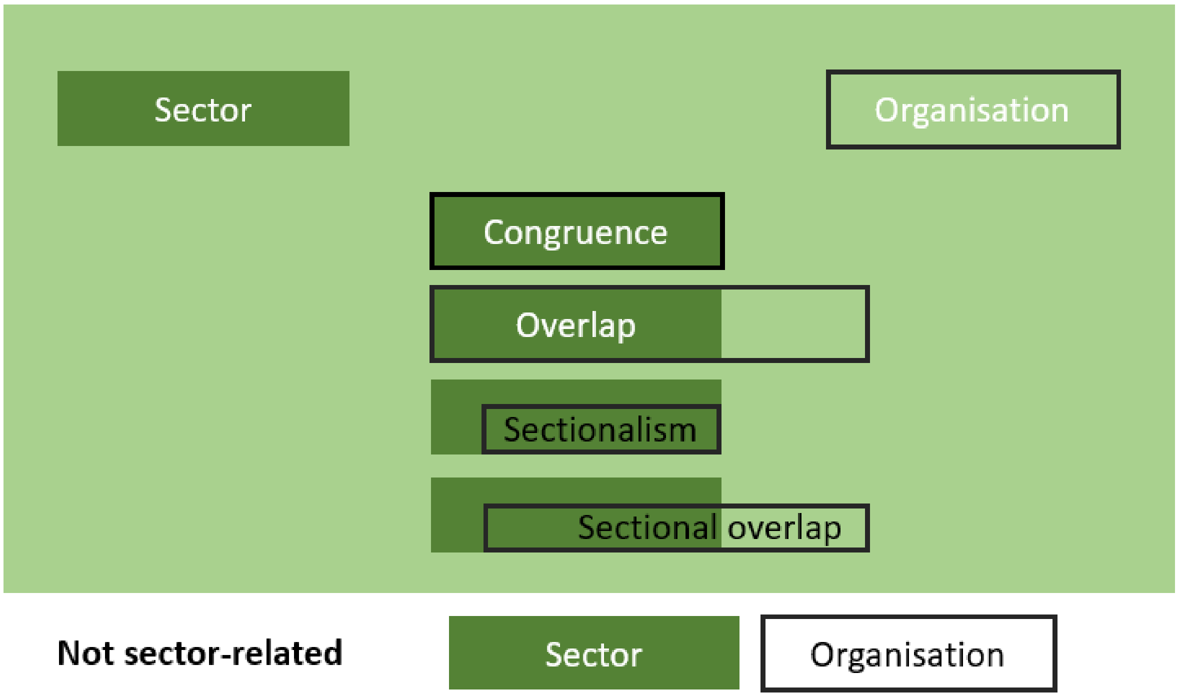
Table 3 and Figure 1 show the membership domain patterns that can exist. The membership domains of trade unions and employer organisations can be exactly in line with the demarcation of the sector (i.e. covering all activities in the graphical industry); this type of sector-relatedness is called ‘congruence’. If the membership domain of an organisation goes beyond the graphical sector as it is defined here, it is categorised as ‘overlapping’. ‘Sectionalism’ is a type of sector-relatedness whereby an organisation covers part of the sector and nothing else, whereas organisations that fall into the category of ‘sectional overlap’ cover part of the sector and also have members in other sectors.

Table 3: Membership domain patterns of an organisation

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

Source: Eurofound.

Figure 1: Four different types of sector-relatedness



Source: Eurofound.

Membership

Membership is another important aspect of representativeness. This study looks at two levels of membership: first, the geographical coverage of the EU-level organisations (e.g. how many Member States that an EU-level trade union or employer organisation has affiliates in) and, second, the organisational density (i.e. the number of members who are employees as a percentage of the total number of employees in a given industry or Member State) of the national affiliates. Important aspects to be assessed are whether the EU-level players organise most of the, or at least the most significant, national-level players (significant in relation to their membership strength in the sector and their involvement in collective bargaining) and whether there are any major gaps in their membership domains.

Membership of a social partner organisation requires payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Considering the limits of transparency, this study does not always distinguish between different membership statuses. Where possible, indirect membership (e.g. membership through another organisation to which the employer organisation or trade union is affiliated) is considered in this report.

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 across the EU through the support of their affiliates. To assess their capacity to negotiate, the **actors** and their objectives and decision-making structures set out in their statutes are considered, as are the **outcomes** in terms of the texts agreed. The **processes** through which the organisations obtain mandates, support and approval from their member organisations in the negotiation process are also considered.

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

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

Finally, representativeness also depends on the organisations' structures and resources, their capacity to encourage the active participation of their members and to combine the different interests of member organisations, and their potential to act autonomously at the European level. Effective participation in the graphical ESSDC is assessed in terms of presence at the meetings during 2022, 2023 and 2024.

0.4. Data collection and quality control measures

Data collection

Representativeness studies combine top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of UNI Europa Graphical and Packaging and Intergraf, while the bottom-up approach looks at the organisations organising employees or employers and/or those involved in sector-related collective bargaining and social dialogue in the Member States and their membership of European-level organisations.

Except where otherwise stated, this study draws on the Member-State-level studies provided by the Network of Eurofound Correspondents (listed in the Annex). Where precise data were not available, estimates were used. Thus, quantitative data (e.g. those data used to calculate density rates) may stem from any of the following sources:

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the organisations;
- estimates, expert opinions and assessments from the Network of Eurofound Correspondents or representatives of the organisations.

Other sources used in this report include the European Commission's social dialogue texts database and the articles of association of the EU-level organisations.

The information used in this study was collected by the Network of Eurofound Correspondents. The national correspondents are required to gather data on all of the relevant national-level organisations and to approach them by telephone or email, using standardised questionnaires. While the questionnaires are in English, correspondents can interview or contact the organisation in the relevant national language. The questionnaires are completed by the national correspondents.

Quality assurance

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 information on other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents between February and July 2023, which was subsequently checked by the author of the report. Where necessary, the national correspondents were asked to revise the national reports during August–November 2023. Based on these collected data, an overview report was drafted by the author between January and November 2024.

A first, informal (pre-evaluation) consultation between the Directorate-General (DG) for Employment, Social Affairs and Inclusion and the European-level sectoral social partners identified in the report was carried out between January and April 2025. Based on the comments received, the draft report was finalised and submitted for formal written evaluation by the Eurofound Advisory Committee on Industrial Relations, the European-level sectoral social partners identified in the report and DG Employment, Social Affairs and Inclusion between May and June 2025. Following this evaluation, final corrections were made and the report was edited and published on the Eurofound website.

During this process, all of the relevant actors and organisations mentioned in the report were invited to check the consistency of the information included in it, thereby ensuring that the bottom-up approach included all of the relevant sector-related organisations from each Member State. As different social partner organisations were able to view the information reported by other organisations in the same Member State and, if necessary, comment on the credibility or accuracy of the information on other organisations representing a similar membership, this process involved an element of mutual control and recognition.

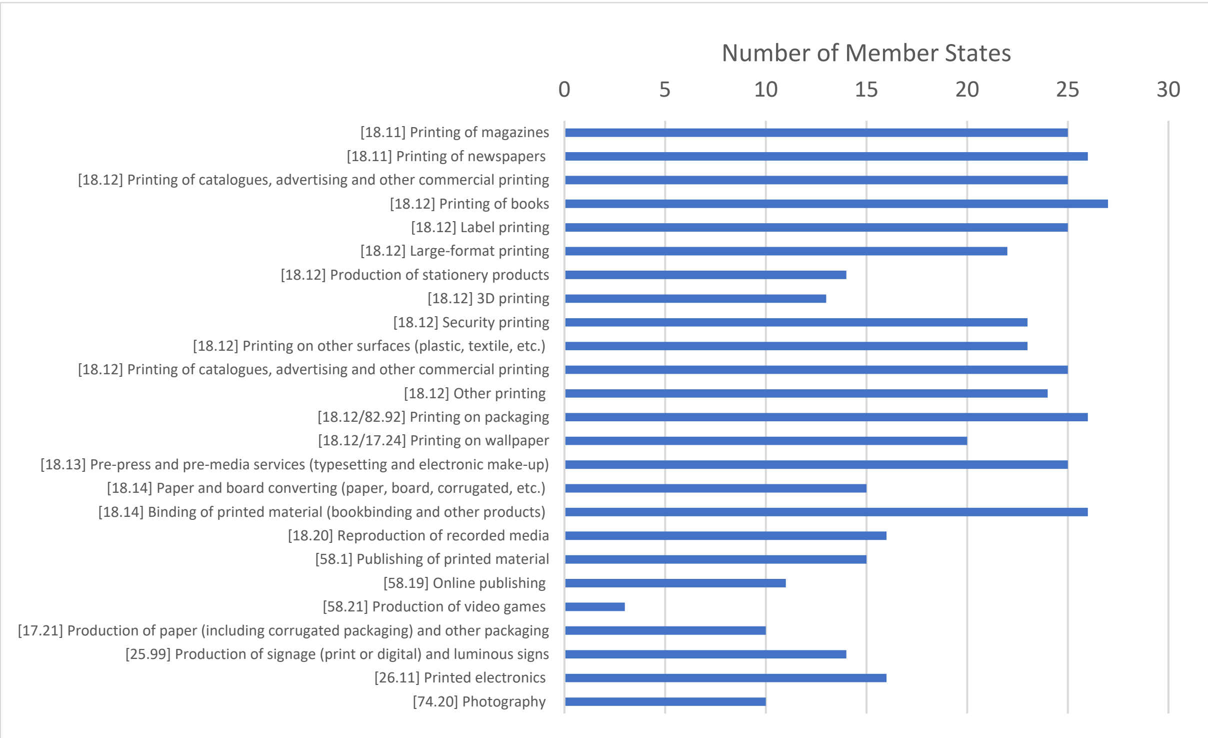
These quality assurance measures and the evaluation and approval of the report by the Eurofound Advisory Committee on Industrial Relations – which consists of representatives of both sides of industry, governments and the European Commission – as well as the evaluation and approval of the report by the European-level sectoral social partners identified in the report, ensure the legitimacy of the findings of this study.

1. Economic background and employment specificities in the graphical sector

1.1. Specificities of graphical sector activities in the Member States

The sector has seen developments since the publication of the previous representativeness study for the graphical industry in 2016. Therefore, before describing the employment and the business landscape of this sector, a more detailed view of the number of Member States that consider different activities to be part of the graphical industry is provided in Figure 2:. In addition to the narrower sector definition used in the previous representativeness study – including only printing and activities related to printing (NACE 18.1) – the reproduction of recorded media (NACE 18.2) is considered to be part of the sector in more than half of the Member States. Additionally, video game production (NACE 58.21) is considered to be part of the graphical industry only in Croatia, Malta and Portugal. For the purpose of this study, the graphical sector will be defined as comprising **printing activities, activities related to printing (NACE 18.1)** and **reproduction of recorded media activities (NACE 18.2)**.

Figure 2: Number of Member States that consider these activities to be part of the graphical sector, 2023



Source: Network of Eurofound Correspondents, 2023. Compiled based on Table 54 in the Annex.

A detailed overview of the activities that are considered part of the graphical industry in each Member State is provided in Table 54 in the Annex.

1.2. Employment in the graphical sector

Based on a wider definition of the graphical sector, the following analysis of the employment and companies in the sector will include activities under NACE 18.1 and NACE 18.2, and some activities under NACE 58.1 and NACE 58.2, as much as possible. For those Member States in which parts of other sectors, besides NACE 18 and NACE 58, are also characterised as graphical sector activities, it is difficult to determine the specific activities that are considered part of the graphical sector. As a separate representativeness report is produced for the paper sector, aggregate information on these activities is not considered in this report. Cross-country differences in the activities covered by the sector make comparisons of the size of this sector across Member States difficult. This is especially true for small economies.

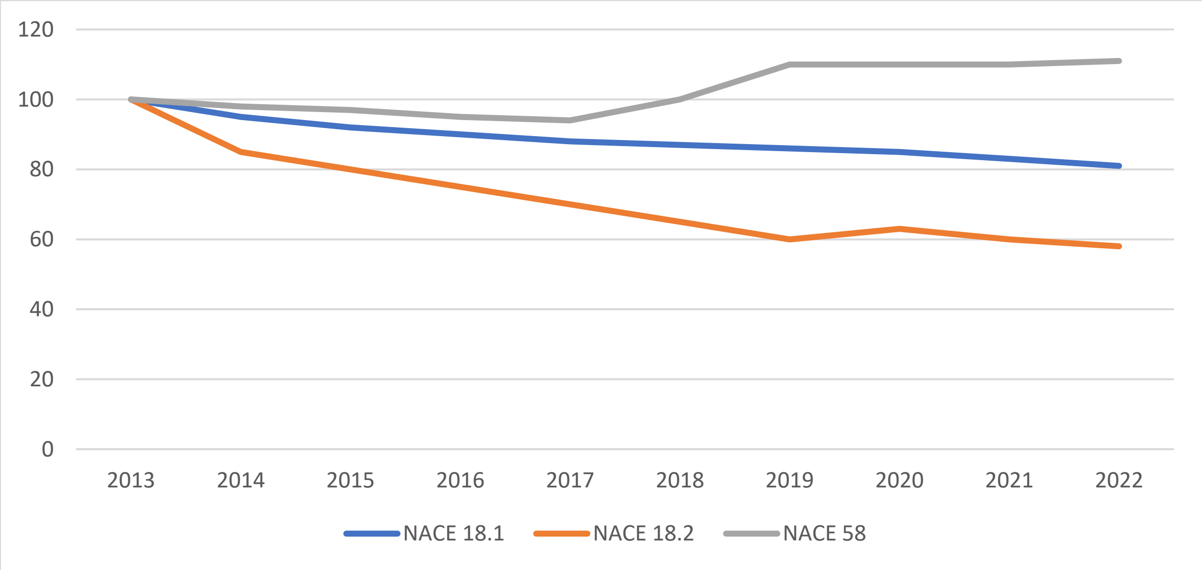
According to Eurostat's structural business statistics (SBS) data, in 2022, around 500 000 people were employed in the graphical sector in the EU-27, following the narrow definition of the graphical sector that includes only printing and activities related to printing (NACE 18.1), which was used in the previous representativeness study published in 2016. This represents 0.32 % of the total employment of the almost 160 million employed people in the EU-27. Comparatively, in 2016, the European graphical industry employed 814 900 people, representing 0.4 % of the total EU-27 employment according to the previous graphical sector representativeness report. Employment in the sector, **using the broader definition** of printing and activities related to printing (NACE 18.1) and reproduction of recorded media activities (NACE 18.2), **represented 0.32 % of total employment in the EU-27 in 2022** ([1]). The sector of publishing activities (NACE 58), on the other hand, is sizeable, with around 780 000 people (550 000 in NACE 58.1 and 230 000 in NACE 58.2) employed in the EU-27. Including NACE 58 as part of the graphical sector would raise the EU-27 employment figure in the sector to 1.3 million people, representing around 0.8 % of the total EU-27 workforce.

Turning to developments in employment over time, employment in printing activities has seen a negative trend. In the EU-27, the decrease in the workforce employed in NACE 18.1 in 2022 compared with 2013 amounted to almost 18 % and that in NACE 18.2 amounted to 44.1 % (Figure 3) ([2]). The situation is different for publishing activities, included as NACE 58 in Figure 3, as no separate data were available for NACE 58.1 and 58.2. While employment in publishing declined by 4 % between 2013 and 2016, an increase of 14 % was seen between 2016 and 2022; therefore, compared with 2013, employment in NACE 58 was 10 % higher in 2022.

([1]) Intergraf industry statistics published on the organisation's website (last accessed 6 September 2024) indicate that there are around 610 000 workers in the graphical sector in the geographical area of the EU-27, Norway, Switzerland and the United Kingdom. According to data from Eurostat's European Union Labour Force Survey, which also includes countries outside the EU-27, employment in NACE 18 was as follows: 99 500 in the United Kingdom in 2019, 11 700 in Switzerland in 2023 and 3 400 in Norway in 2016.

([2]) The exact percentage of the decline could be affected by the break in the SBS series after 2020, but the downward trend was evident even before 2021.

Figure 3: Employment in NACE sectors 18.1, 18.2 and 58, 2013–2022 (2013 = 100)



Source: Eurostat, SBS database.

To match the complex set of activities in the graphical sector, as shown in Figure 2, data for the broad set of activities were used at the most detailed level at which such data were available. Table 4 gives an overview of the absolute number of people employed in the two subsectors of NACE 18 and the two subsectors of NACE 58 in each Member State and for the EU-27 as a whole, based on Eurostat's SBS database. While the SBS database has the advantage of recording data at a detailed level, such data are not available for all Member States and, in some instances, are not available for the EU-27. Where data for the EU-27 were unavailable, the sum of the data for Member States for which information was available was used.

Table 4: Employment in NACE sectors 18.1, 18.2, 58.1 and 58.2, 2022 (thousands)

MS	Entire economy		Printing and service activities related to printing (NACE 18.1)			Reproduction of recorded media (NACE 18.2)			Publishing of books, periodicals and other publishing activities (NACE 58.1)			Software publishing (NACE 58.2)		
	Individuals	% in terms of EU-27 employment	Individuals	% of MS's employment	% of EU-27 NACE 18.1 employment	Individuals	% of MS's employment	% of EU-27 NACE 18.2 employment	Individuals	% of MS's employment	% of EU-27 NACE 58.1 employment	Individuals	% of MS's employment	% of EU-27 NACE 58.2 employment
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)
EU-27	159 909	100.00	500.00	0.31	100.00	10.9	0.01	100.00	552.03	0.34	100.00	230.21	0.14	100.00
DE	39 069	24.43	125.58	0.32	25.12	2.53	0.01	23.32	234.92	0.60	42.51	20.54	0.05	8.34
IT	18 292	11.44	71.69	0.39	14.34	0.29	0.00	2.62	30.66	0.17	5.68	2.43	0.01	1.11
ES	15 635	9.78	53.44	0.34	10.69	2.25	0.01	20.66	35.21	0.23	6.52	16.97	0.11	7.72
PL	11 490	7.19	51.76	0.45	10.35	2.04	0.02	18.72	23.24	0.20	4.10	14.56	0.13	6.62
FR	20 137	12.59	50.82	0.25	10.16	0.93	0.00	8.58	71.43	0.35	12.23	86.94	0.43	38.55
NL	8 381	5.24	16.09	0.19	3.22	0.62	0.01	5.70	22.18	0.26	4.11	1.08	0.01	0.49
HU	3 369	2.11	15.44	0.46	3.09	0.22	0.01	2.05	8.09	0.24	1.50	4.94	0.15	2.25
RO	4 680	2.93	14.68	0.31	2.94	0.15	0.00	1.42	7.71	0.16	1.43	16.21	0.35	6.38
PT	4 361	2.73	13.52	0.31	2.70	0.06	0.00	0.56	6.82	0.16	1.26	7.08	0.16	3.22
BE	3 901	2.44	11.24	0.29	2.25	0.22	0.01	1.99	8.68	0.22	1.61	2.14	0.05	0.97
EL	3 404	2.13	9.70	0.28	1.94	0.23	0.01	2.13	9.97	0.29	1.81	1.59	0.05	0.72
AT	3 756	2.35	9.23	0.25	1.85	0.46	0.01	4.21	10.72	0.29	1.99	5.40	0.14	2.46
BG	2 237	1.40	8.82	0.39	1.76	0.03	0.00	0.25	4.29	0.19	0.79	1.17	0.05	0.53
HR	1 253	0.78	8.28	0.66	1.66	0.07	0.01	0.63	4.44	0.35	0.82	0.69	0.05	0.31
SE	3 600	2.25	7.59	0.21	1.52	0.23	0.01	2.14	20.08	0.56	3.72	20.26	0.56	9.22
SK	1 793	1.12	5.35	0.30	1.07	0.09	0.01	0.85	5.31	0.30	0.98	0.63	0.03	0.28
FI	1 730	1.08	5.29	0.31	1.06	0.19	0.01	1.70	11.85	0.69	2.19	7.08	0.41	3.22
SI	781	0.49	4.30	0.55	0.86	0.02	0.00	0.18	1.93	0.25	0.36	0.16	0.02	0.07
DK	2 143	1.34	4.21	0.20	0.84	0.19	0.01	1.77	14.87	0.69	2.75	7.93	0.37	3.61
LT	1 240	0.78	4.01	0.32	0.80	n/a	n/a	n/a	2.70	0.22	0.50	0.93	0.07	0.42
LV	685	0.43	3.80	0.56	0.76	0.01	0.00	0.12	2.02	0.29	0.37	0.14	0.02	0.06
EE	533	0.33	2.53	0.47	0.51	0.01	0.00	0.10	2.37	0.44	0.44	0.69	0.13	0.31
MT	232	0.15	1.81	0.78	0.36	0.03	0.01	0.29	0.39	0.17	0.07	0.27	0.12	0.12
CZ	4 162	2.60	n/a	n/a	n/a	n/a	n/a	n/a	10.84	0.26	2.01	7.05	0.17	3.21

MS	Entire economy		Printing and service activities related to printing (NACE 18.1)			Reproduction of recorded media (NACE 18.2)			Publishing of books, periodicals and other publishing activities (NACE 58.1)			Software publishing (NACE 58.2)		
	Individuals	**% in terms of EU-27 employment**	**Individuals**	**% of MS's employment**	**% of EU-27 NACE 18.1 employment**	**Individuals**	**% of MS's employment**	**% of EU-27 NACE 18.2 employment**	**Individuals**	**% of MS's employment**	**% of EU-27 NACE 58.1 employment**	**Individuals**	**% of MS's employment**	**% of EU-27 NACE 58.2 employment**
	(1)	**(2)**	**(3)**	**(4)**	**(5)**	**(6)**	**(7)**	**(8)**	**(9)**	**(10)**	**(11)**	**(12)**	**(13)**	**(14)**
IE	2 279	1.43	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
CY	373	0.23	n/a	n/a	n/a	n/a	n/a	n/a	0.47	0.12	0.09	2.60	0.70	1.18
LU	393	0.25	n/a	n/a	n/a	n/a	n/a	n/a	0.84	0.21	0.16	0.73	0.19	0.33

Notes: MS, Member State; n/a, data not available. Comparatively, in the previous graphical sector representativeness report (2016), the European graphical industry was defined as employing 814 900 people, representing 0.4 % of total employment. Member States are listed in order of the number of individuals in NACE 18.1 (column 3) for comparability with the previous representative study for this sector. Grey-shaded cells indicate estimated values based on the available information. The totals (both for absolute numbers and percentages) are calculated using estimations; thus the percentages may not reach / exceed 100 %.

Source: Eurostat, SBS database.

The absolute numbers of individuals employed in printing and service activities related to printing (NACE 18.1) are shown in column 3 of Table 4. For NACE 18.1, data are unavailable for Cyprus, Czechia, Ireland and Luxembourg. The Network of Eurofound Correspondents reports that, in Czechia in 2021, employment in the graphical sector stood at 19 428 individuals, of whom 11 777 were in subsector 18.12. In Cyprus in 2020, around 900 individuals were employed in the graphical sector. In Ireland in 2020, 8 994 individuals were employed in the paper and paper products and printing and reproduction of recorded media sector. For Luxembourg, no information on employment in the sector was provided by the Eurofound correspondent. The highest numbers of individuals employed in NACE 18.1 were reported in Germany, Italy, Spain, Poland and France. As a share of the Member State's total employment, the graphical sector as a whole is most important – in comparison with other Member States – in Sweden (10.4 %), Malta (10.0 %), Germany (9.8 %), Estonia (9.2 %) and Latvia (8.7 %). In the remaining Member States, the share of the sectoral workforce is below 8.5 %. In some of these it is even lower than 4 % (e.g. Bulgaria and Romania) while, in most, it is between 6 % and 8 %. Employment in NACE 18.1 in each Member State as a share of total employment in NACE 18.1 in the EU-27 as a whole (column 5) is similar to employment across the sector in each Member State as a share of total EU-27 employment (column 2).

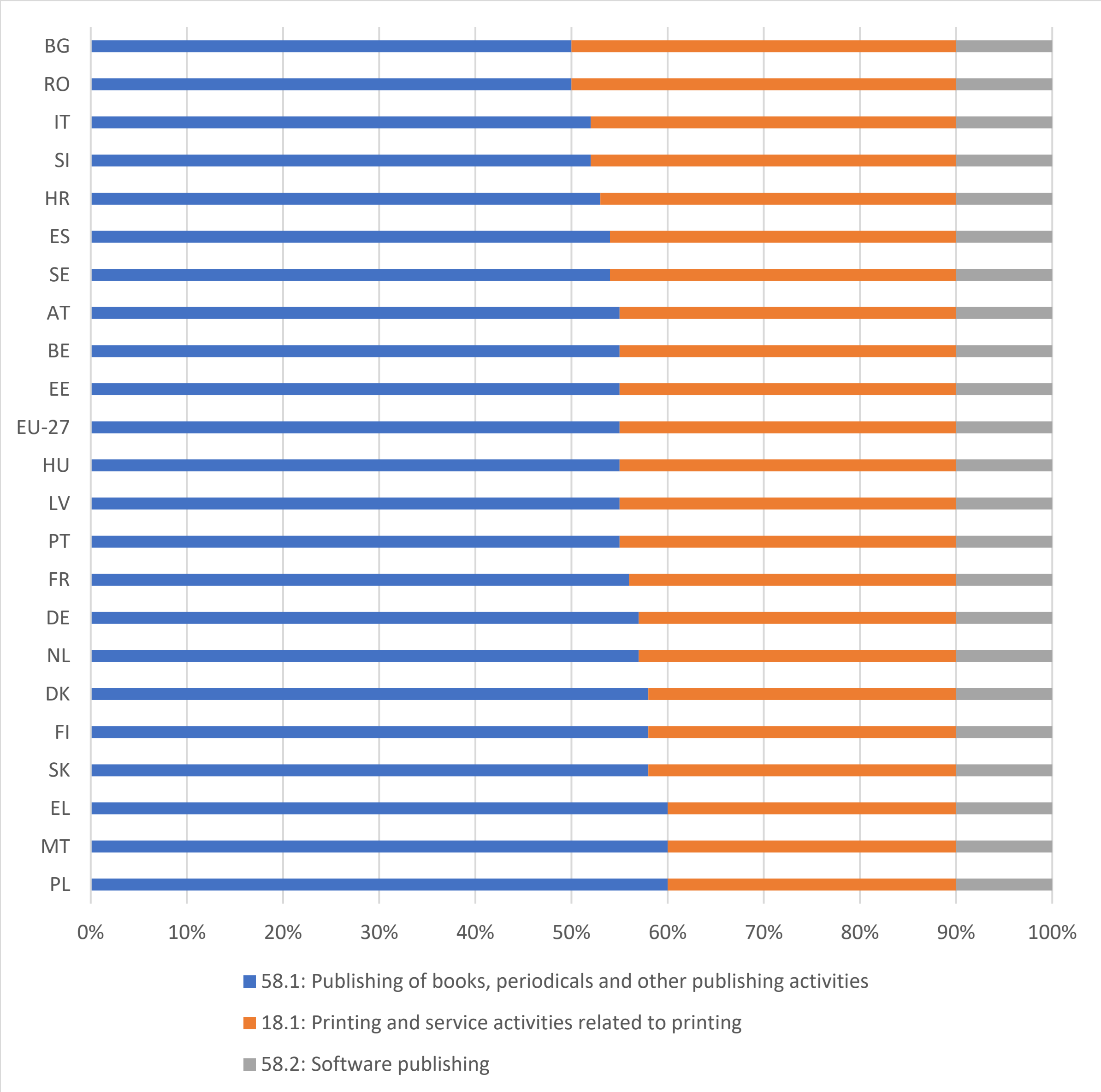
For reproduction of recorded media (NACE 18.2), data are unavailable for the EU-27 and for several Member States. However, adding together the data for the Member States for which information is available, we estimate that NACE 18.2 employs only around 11 000 individuals in the EU-27 (column 6), which represents 0.0068 % of EU-27 employment (column 7). In no Member State is employment in NACE 18.2 as a share of total employment higher than 0.02 %. In absolute figures, the largest number of individuals are employed in Germany, but Spain and Poland stand out, as their share of NACE 18.2 employment in total EU-27 NACE 18.2 employment is much larger than their share of total EU-27 employment.

Data for the publishing of books, periodicals and other publishing activities (NACE 58.1) and software publishing (NACE 58.2) are unavailable for the EU-27 and for Ireland; however, adding together the data for the Member States for which information is available, the estimate is that NACE 58.1 employs around 550 000 people (column 9) in the EU-27, representing 0.34 % of this sector's employment in total EU-27 employment. Using the same method, it is estimated that NACE 58.2 employs around 230 000 individuals (column 12) in the EU-27, representing 0.14 % of the sector's employment in total EU-27 employment. In absolute figures, employment in NACE 58.1 is highest in Germany, representing 42.5 % of all EU-27 employment in the sector. The next largest number of people are employed in France, with a share in EU-27 employment of 12.23 %, which is not that different from France's 12.59 % share in overall EU-27 employment. In no Member State does NACE 58.1 account for more than 1 % of the Member State's employment. Relatively high shares are recorded in Germany and in Nordic Member States (Denmark, Finland, Sweden).

Finally, in absolute figures, employment in NACE 58.2 is highest in France, which has a share in EU-27 employment of almost 40 %; this is over three times the share of France in overall EU-27 employment (13 %). In no Member State does NACE 58.2 account for more than 0.7 % of employment. The highest shares are recorded in Cyprus (0.7 %), Sweden (0.6 %), France (0.4 %) and Finland (0.4 %).

Figure 4 shows that employment in NACE 58.1 activities are dominating in all Member States, recording between 50 % of the employment in the sector in Bulgaria and Romania, up to 60 % in Greece, Malta and Poland.

Figure 4: Share of employment of NACE sectors 18.1, 58.1 and 58.2 in the graphical sector, 2022

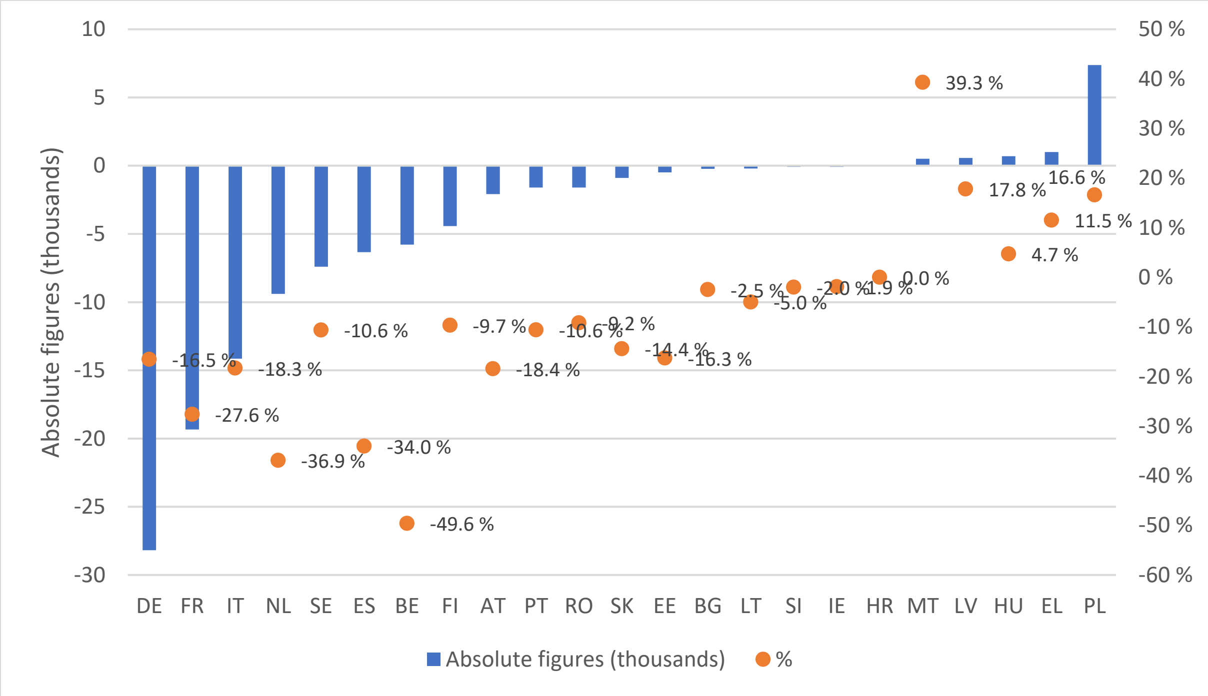


Note: Data are not available for Cyprus, Czechia, Ireland, Lithuania or Luxembourg.

Source: Eurostat, SBS database.

Looking at developments at the Member State level between 2013 and 2022, Figure 5 shows changes in employment in absolute numbers and in percentage terms in NACE 18.1 for all Member States. SBS data show that employment in NACE 18.1 declined in all Member States except Croatia, Malta, Latvia, Hungary, Greece and Poland. In Malta, the number of people employed in the sector increased by around 40 % between 2013 and 2022. In Belgium, employment in NACE 18.1 was particularly badly hit, recording a decline of almost 50 %. The Netherlands recorded a decline of close to 37 %, followed closely by Spain with a decline of 34 %, and there was a decline of around 28 % in France. In the Nordic Member States, employment in NACE 18.1 also suffered a decline of around 10 %. The decline in jobs in Belgium is confirmed by the data collected by the Network of Eurofound Correspondents, which also indicate a decrease in employment for Cyprus and Denmark, two of the Member States for which SBS data are unavailable over this period.

Figure 5: Change in employment in absolute figures (thousands) and percentages in NACE 18.1, 2013–2022



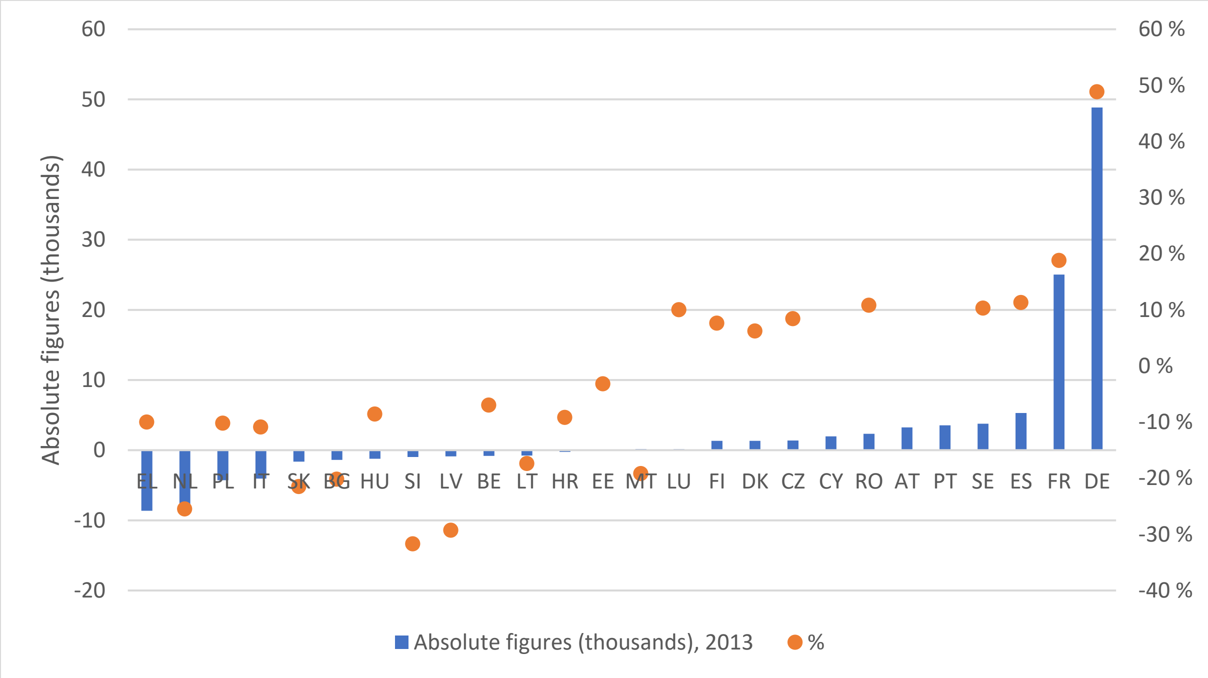
Note: Data for Cyprus, Czechia, Denmark and Luxembourg (2013–2022) are not available.

Source: Eurostat, SBS database.

A comparison between the current picture of sector activities and that recorded in the previous representativeness study for the sector (2016) shows that the challenges faced by the graphical sector were similar. According to data collected by the Network of Eurofound Correspondents, the businesses in most European countries have adopted the strategy of expanding their product lines in the face of the decreasing demand for printing services.

Figure 6 illustrates the changes between 2013 and 2022 in the number of workers in publishing activities (NACE 58) by Member State, showing the positive developments in this sector compared with NACE 18. In total, between 2013 and 2022, employment in the EU-27 increased by some 70 000 (9.7 %). In absolute terms, employment increased significantly in Germany, France and Spain. The picture of changes for NACE 58 appears to be a mirror image of what took place for NACE 18.1. For most Member States, a decrease in employment in printing activities (NACE 18.1) has been accompanied by an increase in employment in publishing activities (NACE 58).

Figure 6: Change in employment in absolute figures (thousands) and percentages in NACE 58, 2013–2022



Note: Data for 2022 for Austria, Cyprus and Portugal are not available, and data for Ireland (2013 and 2022) are not available.

Source: Eurostat, SBS database.

According to SBS data, the share of self-employment in the sector is not substantial, although it varies by Member State. Table 5 presents the share of self-employed people by Member State in each of the printing and publishing subsectors (NACE 18.1, NACE 18.2, NACE 58.1 and NACE 58.2). Less than 15 % (13.3 %) of all employed people in printing activities (NACE 18.1) in the EU-27 are self-employed, which is lower than the average of 15.9 % for the entire EU-27 graphical sector. Only in Greece (28.26 %), Italy (21.98 %) and Slovakia (21.47 %) is there a significant proportion of self-employed people in NACE 18.1. Compared with the previous representativeness study (2016), the share of self-employment in printing activities (NACE 18.1) has not changed.

For the reproduction of recorded media activities (NACE 18.2), the percentage of self-employed people is high in a few Member States – Slovakia, Spain, Finland, Italy and the Netherlands – where over 40 % of the workforce is self-employed. As for publishing activities (NACE 58.1 and NACE 58.2), the share of self-employed people in the EU-27 is less than 10 % (8.8 % in NACE 58.1 and 6.0 % in NACE 58.2). For publishing of printed material (NACE 58.1), the percentage of self-employed people is less than 15 % in most Member States (Austria, Croatia, Denmark, Finland, France, Germany, Italy, Latvia, Lithuania, the Netherlands, Poland, Portugal, Slovenia and Spain). On the other hand, Slovakia stands out, as around half of the workforce in this subsector is self-employed. In online publishing activities (NACE 58.2) the percentage of self-employed people is below 10 % in 12 out of the 20 Member States for which data are available, with Spain recording a share of self-employed people over 20 %. The data collected by the Network of Eurofound Correspondents on the share of self-employed people, listed in Table 55 in the Annex, fill in the data gaps for the Member States for which SBS data are not published: Belgium (high share), Cyprus (low share), Czechia (low share), Estonia (low share), Ireland (low share), Luxembourg (no data on the share) and Malta (low share). The same table contains information on other features of the workforce in the graphical sector, such as skills level and categories of worker in the sector. Most of the workforce in the graphical sector appears to be made up of skilled blue-collar workers, with a low share of management staff. Several Member States report a lack of specialised staff for the sector, as the available workforce has yet to adapt to the new skills that the sector's digitalisation requires.

Table 5: Share of self-employed people in NACE 18.1, 18.2, 58.1 and 58.2, 2021 and 2022

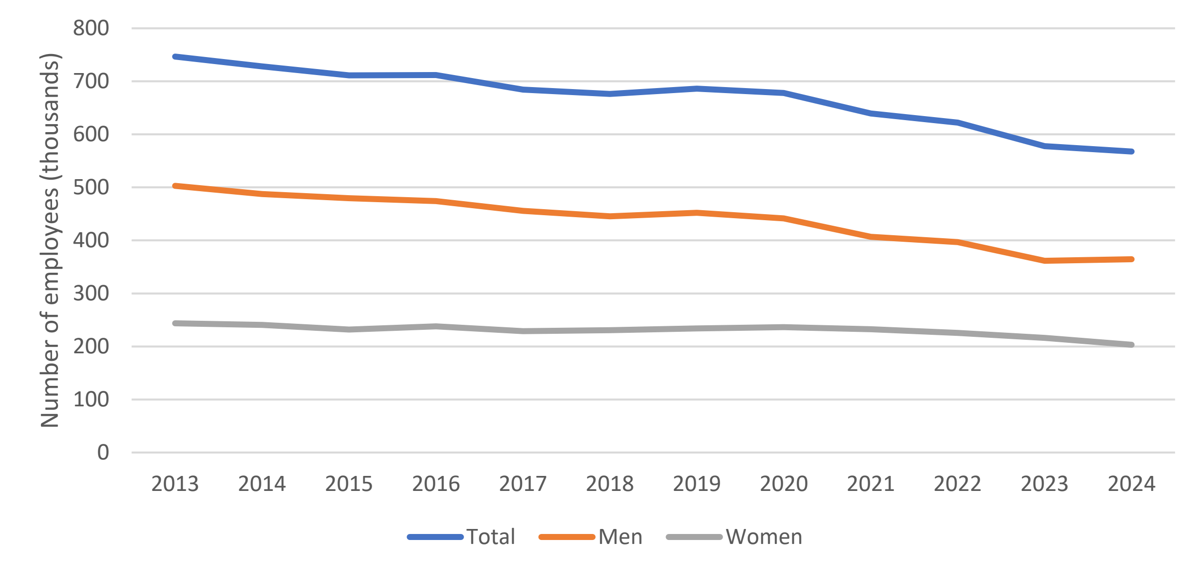
MS	NACE 18.1 (2022)	NACE 18.2 (2022)	NACE 58.1 (2021)	NACE 58.2 (2021)
EL	28.26	28.04	16.60	14.28
IT	21.98	42.81	10.44	8.57
SK	21.47	81.52	46.74	2.47
FR	17.11	14.49	10.47	1.75
PL	16.33	8.75	14.72	17.87
ES	14.67	64.02	14.37	27.93
HU	14.35	32.74	18.96	17.56
SI	14.26	27.78	11.95	16.11
EU-27	13.29	n/a	8.77	6.04
SE	12.46	11.29	17.67	12.68
NL	11.66	41.87	6.69	6.53
LT	10.13	n/a	10.86	19.00
AT	9.71	3.77	12.32	6.41
HR	9.57	38.30	6.74	19.05
BG	8.39	20.69	16.99	8.91
FI	6.98	61.54	2.45	1.05
PT	6.65	33.33	10.14	2.69
RO	6.23	31.06	15.85	3.52
DK	4.10	2.58	2.81	0.87
DE	3.85	7.68	2.43	6.58
LV	2.40	22.22	5.09	5.77

Note: MS, Member State; n/a, data not available. The latest year for which data for NACE 58.1 and NACE 58.2 are available is 2021. Data are not available for Belgium, Cyprus, Czechia, Estonia, Ireland, Luxembourg and Malta.

Source: Eurostat, SBS database.

Looking at the demographic composition of the graphical sector workforce shows that the sector is dominated by male workers (Figure 7), who constituted 64 % of workers in the sector in 2024.

Figure 7: Gender distribution of the workforce in the graphical sector (NACE 18) in the EU-27, 2013–2024



Source: Eurostat, Labour Force Survey.

1.3. Companies in the graphical sector and economic development

In 2022, according to Eurostat SBS data, there were approximately 94 000 companies in printing activities (NACE 18.1) in the EU-27, which accounted for 0.29 % of all EU-27 companies (Table 6) ([3]). The number of companies is highest in France, Italy, Spain and Germany. Companies in these four Member States account for over half (53.3 %) of all EU-27 printing companies. The Member States with the lowest number of companies in the printing subsector are Luxembourg, Malta, Estonia, Latvia and Denmark. Table 6 also shows the number of companies in printing activities as a share of each Member State's total number of companies, which is less than 0.65 % in all Member States.

In 2022, according to Eurostat SBS data, there were around 7 000 companies in the reproduction of recorded media subsector (NACE 18.2) in the EU-27, which accounts for 0.02 % of all EU-27 companies. The number of companies is highest in Czechia and Spain. Companies in these two Member States together account for over half (55.5 %) of all EU-27 reproduction of recorded media companies. The Member States with the lowest number of companies in this subsector are Luxembourg with two companies and Estonia with four companies. Lithuania has no companies in this subsector.

According to Eurostat SBS data, in 2022, there were around 80 000 companies in the publishing of printed material subsector (NACE 58.1) in the EU-27. Nearly a third of these were in France. This is consistent with the fact that, as presented in Table 54 in the Annex, in France, newspaper printing is considered not part of NACE 18.1 but part of newspaper publishing. The lowest numbers of companies in this subsector were recorded in Luxembourg and Cyprus. In all Member States, the companies active

([3]) The total does not include companies in Cyprus or Ireland, for which no data are available from the SBS database. In addition, the replies from the Network of Eurofound Correspondents do not include data for NACE 18.1 separately for these two Member States. For Cyprus, the number of companies in the graphical sector, which also includes parts of NACE 58, as suggested by Table 4, was 250 in 2020. For Ireland, the Network of Eurofound Correspondents reports 1 551 companies in the paper and paper products and printing and reproduction of recorded media sector in 2021.

in NACE 58.1 represent less than 0.5 % of all companies in the Member State, the lowest percentage being recorded in Italy, with 0.10 %, followed by Cyprus and Portugal, with 0.11 % each.

Finally, the same data source shows that around 30 000 companies were active in online publishing activities (NACE 58.2) in 2022 in the EU-27, accounting for 0.09 % of all companies in the EU-27. The highest number of companies is found in France, followed by Spain. With the exceptions of Sweden, Luxembourg, Estonia, Denmark, Cyprus and Spain, companies in this subsector represent less than 0.15 % of all companies in each Member State.

From the above, it emerges that, on average in the EU-27, printing (NACE 18.1) and publishing (NACE 58) companies account for 0.8 % of all companies in the economy. Most Member States are close to the average. Exceptions, however (with shares of over 1 %), are Czechia (1.5 %), Sweden (1.4 %), Croatia (1.2 %), Slovenia (1.1 %) and Estonia (1.1 %). There are also exceptions with smaller shares (less than 0.5 %), namely Cyprus (0.3 %) and Portugal (0.4 %).

Table 6: Number of companies in the graphical sector, 2022

MS	NACE 18.1 (printing activities)			NACE 18.2 (reproduction of recorded media)			NACE 58.1 (publishing of printed material)			NACE 58.2 (online publishing)		
	Number of companies	% of companies in the sector	% of companies in the MS	Number of companies	% of companies in the sector	% of companies in the MS	Number of companies	% of companies in the sector	% of companies in the MS	Number of companies	% of companies in the sector	% of companies in the MS
EU-27	93 786	100.00	0.29	~ 7 000	100.00	0.02	~ 80 000	100.00	0.25	~ 30 000	100.00	0.09
AT	846	0.90	0.14	19	0.27	0.00	1 186	1.48	0.20	315	1.05	0.05
BE	3 027	3.23	0.35	211	3.01	0.02	1 323	1.65	0.16	761	2.54	0.09
BG	945	1.01	0.24	9	0.13	0.0023	959	1.20	0.24	143	0.48	0.04
CY	n/a	n/a	n/a	n/a	n/a	n/a	93	0.12	0.11	179	0.60	0.21
CZ	7 000	7.46	0.55	2 275	32.50	0.18	5 346	6.68	0.42	1 192	3.97	0.09
DE	9 487	10.12	0.29	371	5.30	0.01	5 533	6.92	0.17	1 533	5.11	0.05
DK	489	0.52	0.13	13	0.19	0.00	884	1.11	0.23	928	3.09	0.24
EE	368	0.39	0.27	4	0.06	0.00	386	0.48	0.28	431	1.44	0.32
EL	2 781	2.97	0.30	74	1.06	0.01	1 969	2.46	0.21	367	1.22	0.04
ES	12 340	13.16	0.37	1 605	22.93	0.05	5 981	7.48	0.18	5 571	18.57	0.17
FI	878	0.94	0.20	385	5.50	0.09	1 277	1.60	0.29	233	0.78	0.05
FR	15 273	16.28	0.32	251	3.59	0.01	23 469	29.34	0.48	6 709	22.36	0.14
HR	1 400	1.49	0.62	31	0.44	0.01	688	0.86	0.30	245	0.82	0.11
HU	2 958	3.15	0.30	89	1.27	0.01	2 139	2.67	0.22	1 142	3.81	0.12
IE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT	12 909	13.76	0.29	150	2.14	0.00	4 633	5.79	0.10	392	1.31	0.01
LT	721	0.77	0.22	0	0.00	0.00	665	0.83	0.20	221	0.74	0.07
LU	58	0.06	0.14	2	0.03	0.0047	79	0.10	0.19	141	0.47	0.33
LV	387	0.41	0.27	14	0.20	0.01	436	0.55	0.30	44	0.15	0.03
MT	209	0.22	0.37	25	0.36	0.04	105	0.13	0.19	67	0.22	0.12
NL	2 862	3.05	0.13	539	7.70	0.02	3 670	4.59	0.17	289	0.96	0.01
PL	8 957	9.55	0.34	205	2.93	0.01	4 080	5.10	0.15	2 319	7.73	0.09

MS	NACE 18.1 (printing activities)			NACE 18.2 (reproduction of recorded media)			NACE 58.1 (publishing of printed material)			NACE 58.2 (online publishing)		
	Number of companies	**% of companies in the sector**	**% of companies in the MS**	**Number of companies**	**% of companies in the sector**	**% of companies in the MS**	**Number of companies**	**% of companies in the sector**	**% of companies in the MS**	**Number of companies**	**% of companies in the sector**	**% of companies in the MS**
PT	2 254	2.40	0.17	41	0.59	0.00	1 477	1.85	0.11	534	1.78	0.04
RO	2 829	3.02	0.28	81	1.16	0.01	2 363	2.95	0.24	1 316	4.39	0.13
SE	2 092	2.23	0.25	66	0.94	0.01	3 978	4.97	0.47	3 005	10.02	0.36
SI	1 112	1.19	0.57	10	0.14	0.01	487	0.61	0.25	53	0.18	0.03
SK	1 604	1.71	0.26	82	1.17	0.01	2 915	3.64	0.48	22	0.07	0.00

Note: MS, Member State; n/a, data not available. Grey-shaded cells indicate that the data used in the calculations are estimated using the published SBS data. The totals (both for absolute numbers and percentages) are calculated using estimations; thus the percentages may not reach/ exceed 100%.

Source: Eurostat, SBS database.

The number of companies in a sector can indicate the sector's structure and demonstrate key factors such as the level of competition. A more complete picture of a sector's structure requires the distribution of companies by size, which is presented in Table 7. When all four subsectors (NACE 18.1, 18.2, 58.1 and 58.2) are combined, over 90 % are microcompanies with up to nine employees per company. Nearly all companies (98.5 %) in the reproduction of recorded media (NACE 18.2) have fewer than 10 employees. Less than 0.5 % of companies in all four subsectors combined are large companies with at least 250 employees, and less than 1.5 % have between 50 and 249 employees. Based on the information on each of the four subsectors, the conclusion is that companies with fewer than 20 employees constitute around 96 % of graphical sector companies. According to the SBS data (as used in Table 7), companies in the graphical sector had approximately the same share of microcompanies as the economy as a whole in 2022: 94.13 % of companies in the EU-27 were microcompanies (0–9 employees), 3.25 % were small companies (10–19 employees), 1.69 % were medium-sized companies (20–49 employees), 0.77 % were large companies (50–249 employees) and only 0.16 % were very large companies (250 or more employees).

Table 7: Number of companies by company size class in the EU-27, 2022

Sector	Statistic	Total	Company size class				
			0–9	**10–19**	**20–49**	**50–249**	**250+**
NACE 18.1: Printing and service activities related to printing	Absolute figures	95 169	86 256	4 765	2 692	1 296	160
	%	100.0	90.6	5.0	2.8	1.4	0.2
NACE 18.2: Reproduction of recorded media	Absolute figures	6 761	6 660	51	30	20	n/a
	%	100.0	98.5	0.8	0.4	0.3	n/a
NACE 58.1: Publishing of books, periodicals and other publishing activities	Absolute figures	74 337	70 000	2 029	1 195	810	303
	%	100.0	94.2	2.7	1.6	1.1	0.4
NACE 58.2: Software publishing	Absolute figures	27 907	24 710	1 335	1 000	726	136
	%	100.0	88.5	4.8	3.6	2.6	0.5
Total (NACE 18 + NACE 58)	Absolute figures	204 174	187 626	8 188	4 917	2 852	599
	%	100.0	91.9	4.0	2.4	1.4	0.3

Notes: n/a, data not available. Grey-shaded cells are estimates based on information available for individual Member States. Data for 2022 for NACE 18.2, size class 20–49, and for NACE 58.2, size class 0–9, were not available, so data for 2021 were used.

Source: Eurostat, SBS database.

Table 8 shows the distribution of employment by company size. Around a third of employees in the printing subsector (NACE 18.1) are employed in microcompanies (0–9 employees), almost a quarter are employed in large companies (50–249 employees) and around 16 % are employed in both medium-sized (20–49 employees) and very large (250 or more employees) companies, with the lowest share (12.4 %) recorded in small companies (10–19 employees). The distribution of employment by company size is different for the reproduction of recorded media subsector (NACE 18.2), with over 40 % of employees employed in microcompanies and around a third employed in very large companies. Over half of all employees in the publishing of printed material subsector (NACE 58.1) are employed by very large companies and only 17.3 % of the employees in this subsector work in microcompanies, which is similar to the distribution of employment in the online publishing activities (NACE 58.2).

Table 8: Number of people employed by company size class, EU-27, 2020

Sector	Statistic	Total	Company size class				
			0–9	10–19	20–49	50–249	250+
NACE 18.1: Printing and service activities related to printing	Absolute figures	524 423	161 652	64 920	84 167	126 000	87 684
	%	100.0	30.8	12.4	16.0	24.0	16.7
NACE 18.2: Reproduction of recorded media	Absolute figures	15 294	6 665	722	853	2 050	5 004
	%	100.0	43.6	4.7	5.6	13.4	32.7
NACE 58.1: Publishing of books, periodicals and other publishing activities	Absolute figures	557 094	96 200.0	27 754.0	36 714.0	89 180.0	307 246.0
	%	100.0	17.3	5.0	6.6	16.0	55.2
NACE 58.2: Software publishing	Absolute figures	242 419	36 900	18 561	31 029	71 776	84 153
	%	100.0	15.2	7.7	12.8	29.6	34.7
Total (NACE 18 + NACE 58)	Absolute figures	1 339 230	301 417	111 957	152 763	289 006	484 087
	%	100.0	22.5	8.4	11.4	21.6	36.1

Notes: For both NACE 18.1 and NACE 18.2, the total number of employees is much larger than that used in Table 4 due to the different reference years. The most recent data available for company size groups are for 2020. Grey-shaded cells are estimates based on information available for individual Member States. Data for 2022 for NACE 18.2, size class 20–49, and for NACE 58.2, size class 0–9, were not available, so data for 2021 were used.

Source: Eurostat, SBS database.

The information collected by the Network of Eurofound Correspondents, listed in Table 9, complements the distribution of employment in the different company sizes by providing a view on the concentration of employment in the three largest enterprises in the graphical sector in each Member State, as well as the average company workforce size in each Member State. The three largest companies, on average, represent 16.5 % of each Member State's sectoral workforce. In some Member

States, the three largest companies employ over a third of the sectoral workforce: in Malta the two largest companies employ almost half of the graphical sector's employment, while in Slovenia and Latvia, the three largest companies employ around a third.

On average, the largest companies in the graphical sector across the EU-27 have 712 employees and represent a share of 8.4 % of the sectoral workforce. On average, the second-largest companies in the EU-27 have 406 employees and represent a share of 5.5 % of the sectoral workforce. All of the third-largest companies in the sector, in all Member States except Slovakia and Slovenia, represent a share of less than 5 % of the sectoral workforce. In Slovakia and Slovenia, the third-largest companies represent shares of 6.86 % and 5.53 %, respectively. On average, the third-largest companies in the EU-27 have 262 employees and represent a share of 2.8 %. To summarise the extent to which employment is concentrated in only a few firms, Table 9 also shows the three-firm concentration ratio (CR3), which is the percentage of the sector's employment that is concentrated in the three largest companies. The average CR3 in the EU-27 is 16.49 %. Using the CR3 index, employment appears to be most concentrated in the three-largest companies in Malta (51.99 %), Slovenia (38.81 %), Latvia (31.62 %), Slovakia (25.43 %) and Cyprus (22.78 %).

The average company size in the sector in the EU-27 is around nine employees, although this average varies significantly across the Member States. The largest companies, on average, are in Austria (average of 46 employees) followed by Finland (average of 28 employees) and Lithuania (average of 12 employees). This suggests that small companies play a significant role in this sector. This is one of the obstacles faced by trade unions and employer organisations in organising their members, as also highlighted in Table 56 in the Annex.

Table 9: Sectoral workforce in the largest companies, average company size and concentration in terms of employment, 2023

MS	Number of sector-related employees in the largest company in the sector	% of the sectoral workforce in the largest company	Number of sector-related employees in the second-largest company in the sector	% of the sectoral workforce in the second-largest company	Number of sector-related employees in the third-largest company in the sector	% of the sectoral workforce in the third-largest company	CR3	Average company size (number of employees)
AT	710	10.36	170	2.48	82	1.20	14.04	45.99
BE	507	7.76	263	4.03	215	3.29	15.08	1.09
BG	380	4.33	339	3.86	265	3.02	11.21	9.27
CY	130	14.44	40	4.44	35	3.89	22.78	3.60
CZ	1 228	6.32	376	1.94	243	1.25	9.51	1.58
DE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	10.77
DK	344	7.81	301	6.83	98	2.22	16.86	5.23
EE	237	9.48	177	7.08	120	4.80	21.36	6.58
EL	195	2.71	167	2.32	100	1.39	6.42	6.97
ES	2 832	3.61	836	1.07	245	0.31	4.99	6.05

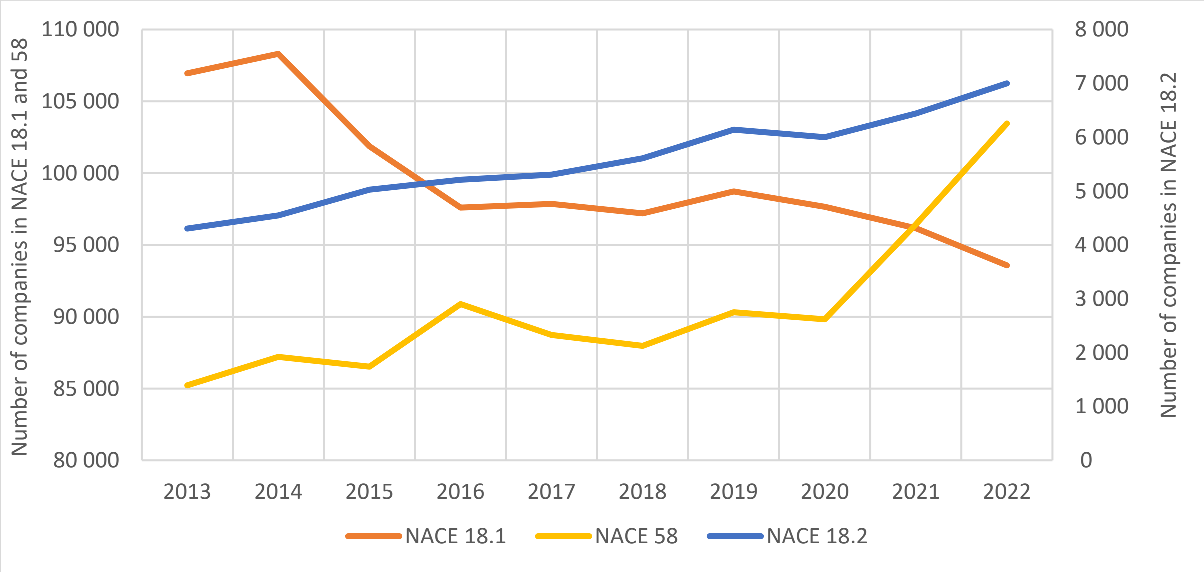
MS	Number of sector-related employees in the largest company in the sector	% of the sectoral workforce in the largest company	Number of sector-related employees in the second-largest company in the sector	% of the sectoral workforce in the second-largest company	Number of sector-related employees in the third-largest company in the sector	% of the sectoral workforce in the third-largest company	CR3	Average company size (number of employees)
FI	900	3.82	370	1.57	300	1.27	6.67	27.69
FR	2 000	5.03	960	2.42	950	2.39	9.84	10.53
HR	380	6.33	340	5.67	90	1.50	13.50	7.50
HU	677	4.31	453	2.89	403	2.57	9.77	4.32
IE	800	8.89	800	8.89	140	1.56	19.35	6.08
IT	1 000	1.33	950	1.27	850	1.13	3.73	5.75
LT	250	6.62	180	4.77	130	3.44	14.83	11.65
LU	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
LV	665	18.53	300	8.36	170	4.74	31.62	8.41
MT	500	28.89	400	23.11	n/a	n/a	51.99	8.83
NL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	6.13
PL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
PT	724	5.79	300	2.40	234	1.87	10.06	5.43
RO	426	3.30	357	2.77	303	2.35	8.42	5.26
SE	262	4.47	255	4.35	246	4.20	13.03	2.18
SI	800	18.68	625	14.60	237	5.53	38.81	3.82
SK	428	9.79	384	8.78	300	6.86	25.43	2.25
EU-27 average	712	8.4	406	5.5	262	2.8	16.49	8.52

Notes: MS, Member State; n/a, data not available. The data used to calculate the share of each company's workforce within the total sector workforce are those supplied by the Network of Eurofound Correspondents. CR3 represents the sum of the employment shares of the three largest companies.

Source: Network of Eurofound Correspondents, 2023.

Turning to developments over time, Figure 8 shows the number of enterprises in printing activities (NACE 18.1), the reproduction of recorded media (NACE 18.2) and publishing activities, including publishing of printed materials and online publishing (NACE 58) between 2013 and 2022. Similar to the developments in employment, described above, the number of companies in printing activities (NACE 18.1) has been decreasing, while the number of companies in publishing (NACE 58) has been increasing. In the case of the reproduction of recorded media activities (NACE 18.2), the number of people employed has declined, but the number of companies appears to be increasing.

Figure 8: Number of companies in the graphical sector in the EU-27 in NACE 18.1, 18.2 and 58, 2013–2022



Note: The total for the EU-27 is systematically defined across years in terms of Member State composition.

Source: Eurostat, SBS database.

Table 10 provides a Member-State-level overview of the change in the number of companies in printing activities (NACE 18.1) between 2013 and 2022. Despite most Member States showing a decrease, in several Member States (Estonia, Greece, Ireland, Lithuania, Poland, Romania and Slovakia), this subsector has recorded an increase in the number of companies. In Estonia, Lithuania, Romania and Slovakia, the number of companies has increased despite a decline in employment in the sector (see Figure 3). As regards the change in the number of companies in the reproduction of recorded media (NACE 18.2) between 2013 and 2022, increases were seen in Belgium, Czechia, Finland, Germany, Ireland, the Netherlands, Portugal and Spain, as Table 11 shows.

Finally, developments in the number of companies in publishing activities, both printed and online (NACE 58), between 2013 and 2022 were much more homogeneous across Member States (Table 12). In most Member States, the number of companies increased, with large percentage increases recorded in Austria, Cyprus, Estonia, Finland, France, Lithuania, Luxembourg, Malta and Spain and moderate increases in Belgium, Denmark, Portugal and Romania.

Data collected by the Network of Eurofound Correspondents confirm the contrasting developments recorded in the number of companies and employment for printing activities (NACE 18.1) and publishing activities, including publishing of printed materials and online publishing (NACE 58). The explanations provided by the Network of Eurofound Correspondents for the longer-term trends are a decline in newspaper and book printing and an increase in digital activities, including online publishing, large-format printing, label printing and security printing. Ecological concerns were also listed as a reason for the decline in printed matter in several Member States. More short-term concerns arise from paper shortages and the high costs of energy following the Russian war of aggression against Ukraine.

The Intergraf 2024 economic report [4] shows that 58 % of activity in the graphical sector is in packaging/labels, while commercial/other printing accounts for 15 % of activities, advertising/catalogues account for 14 %, magazines/newspapers account for 8 % and books account for 4 %.

[4] https://www.intergraf.eu/images/pdf/2024_Intergraf_Economic%20Report_Abstract.pdf.

Table 10: Number of enterprises in NACE 18.1, 2013–2022

MS	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% change between 2013 and 2022
EU-27	106 946	108 304	101 866	101 560	97 860	98 275	98 730	97 655	95 094	93 577	– 12.50
AT	854	854	842	856	845	798	776	765	871	846	– 0.94
BE	3 480	4 158	4 032	**4 090**	4 148	3 111	3 692	3 905	**3 466**	3 027	– 13.02
BG	1 023	1 026	1 013	1 013	999	1 006	983	960	959	945	– 7.62
CZ	7 598	7 546	7 528	7 571	7 438	7 594	7 452	7 349	7 247	7 000	– 7.87
DE	11 536	11 002	10 065	10 046	9 585	10 364	10 559	11 099	9 818	9 487	– 17.76
DK	806	771	715	685	648	595	564	533	500	489	– 39.33
EE	362	357	383	377	387	366	369	362	376	368	1.66
EL	2 336	2 920	2 756	2 651	2 534	2 557	2 582	2 568	2 662	2 781	19.05
ES	14 041	13 649	12 340	12 380	11 982	12 353	12 587	12 355	12 485	12 340	– 12.11
FI	918	887	863	814	784	741	719	663	892	878	– 4.36
FR	19 065	21 320	17 920	17 256	15 052	14 537	14 674	14 702	14 758	15 273	– 19.89
HR	1 490	1 399	1 300	1 248	1 208	1 197	1 368	1 331	1 376	1 400	– 6.04
HU	3 198	3 198	3 153	3 098	3 040	2 994	2 948	2 856	2 883	2 958	– 7.50
IE	1 005	1 014	1 007	1 032	1 079	**1 076**	1 072	1 068	n/a	n/a	6.27
IT	15 851	15 206	14 869	15 057	14 901	14 318	13 731	13 327	13 140	12 909	– 18.56
LT	537	605	625	661	700	696	698	709	746	721	34.26
LU	94	90	83	79	71	69	66	61	57	58	– 38.30
LV	475	471	463	469	451	451	438	427	414	387	– 18.53
NL	3 787	3 656	3 492	3 375	3 305	3 221	3 108	3 024	2 885	2 862	– 24.43
PL	8 629	8 254	8 423	8 820	8 611	10 264	10 137	9 650	9 439	8 957	3.80
PT	2 519	2 467	2 451	2 415	2 365	2 364	2 375	2 254	2 260	2 254	– 10.52
RO	1 915	1 973	1 998	1 928	2 012	2 210	2 430	2 522	2 785	2 829	47.73
SE	2 946	2 896	2 821	2 782	2 738	2 402	2 373	2 333	2 349	2 092	– 28.99
SI	1 179	1 183	1 189	1 182	1 165	1 164	1 144	1 127	1 107	1 112	– 5.68
SK	1 302	1 402	1 535	1 675	1 812	1 827	1 885	1 705	1 619	1 604	23.20

Notes: MS, Member State; n/a, data not available. The data in bold are estimates generated by interpolating the two adjacent values. For Ireland, the change in the final column is between 2013 and 2020, as data after 2020 are not available. No data were published for Cyprus throughout this period, and data for Malta were published only for some years in this period.

Source: Eurostat, SBS database.

Table 11: Number of enterprises in NACE 18.2, 2013–2022

MS	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% change between 2013 and 2022
EU-27	4 304	4 548	5 028	5 283	5 310	5 809	6 135	5 294	6 251	~ 7 000	62.64
AT	20	23	22	22	16	16	15	18	18	19	– 5.00
BE	140	76	43	**74**	105	137	197	131	**171**	211	50.71
BG	12	16	16	19	16	19	13	11	10	9	– 25.00
CZ	959	1 127	1 245	1 521	1 698	2 016	2 157	2 209	2 244	2 275	137.23
DE	317	438	277	268	248	382	427	474	371	371	17.03
DK	21	21	17	21	19	17	18	18	16	13	– 38.10
EE	6	4	3	1	0	1	2	4	4	4	– 33.33
EL	81	86	73	64	58	62	64	67	67	74	– 8.64
ES	342	330	1 139	1 076	1 049	1 139	1 228	1 253	1 434	1 605	369.30
FI	146	128	123	135	132	118	127	124	344	385	163.70
FR	333	455	313	325	264	244	267	242	243	251	– 24.62
HR	59	55	46	43	39	37	36	32	31	31	– 47.46
HU	133	135	123	114	106	100	106	102	93	89	– 33.08
IE	155	159	170	159	195	**201**	206	n/a	n/a	n/a	32.90
IT	280	263	240	229	211	209	159	144	126	150	– 46.43
LT	5	3	3	3	3	3	1	1	0	0	– 100.00
LU	2	2	2	1	1	2	2	0	0	2	0.00
LV	18	19	19	18	18	21	20	15	14	14	– 22.22
MT	0	0	**2**	3	**4**	5	7	8	18	25	n/a
NL	489	471	473	479	470	467	493	517	524	539	10.22
PL	366	342	309	324	296	293	282	277	236	205	– 43.99
PT	40	42	49	38	38	32	37	33	37	41	2.50
RO	85	85	77	76	75	71	59	57	79	81	– 4.71
SE	138	136	124	113	110	96	91	83	75	66	– 52.17
SI	19	18	14	13	14	14	13	12	12	10	– 47.37
SK	138	114	106	144	125	107	108	92	84	82	– 40.58

Notes: MS, Member State; n/a, data not available. The data in bold are estimates generated by interpolating the two adjacent values. For Ireland, the change in the final column is between 2013 and 2019, as data after 2019 are not available. No data were published for Cyprus throughout this period.

Source: Eurostat, SBS database.

Table 12: Number of companies in NACE 58, 2013–2022

MS	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% change between 2013 and 2022
EU-27	85 225	87 209	86 529	90 877	88 735	87 972	90 316	89 828	97 191	**104 272**	24.45
AT	1 153	1 150	1 132	1 112	1 153	1 083	1 134	1 144	1 505	1 501	30.18
BE	1 757	1 474	1 359	1 476	1 466	1 723	1 975	1 792	2 048	2 084	18.61
BG	1 179	1 180	1 182	1 170	1 139	1 125	1 130	1 102	1 111	1 102	– 6.53
CY	178	176	163	151	156	165	172	175	202	272	52.81
CZ	5 928	5 877	5 818	6 030	6 263	6 329	6 345	6 397	6 478	6 538	10.29
DE	7 645	8 596	8 610	9 053	9 133	7 925	7 687	7 078	7 212	7 066	– 7.57
DK	1 491	1 557	1 599	1 707	1 770	1 841	1 817	1 823	1 874	1 812	21.53
EE	333	370	402	389	433	512	622	611	757	817	145.35
EL	3 418	2 763	2 474	2 386	2 235	2 253	2 259	2 234	2 283	2 336	– 31.66
ES	8 218	8 664	9 444	10 804	10 735	11 421	10 851	10 238	11 527	11 551	40.56
FI	1 051	1 027	1 024	974	969	945	956	944	1 505	1 510	43.67
FR	15 547	17 074	16 657	18 790	16 395	16 200	19 037	20 272	23 251	30 178	94.11
HR	1 053	976	953	928	885	867	923	892	939	933	– 11.40
HU	3 913	3 867	3 725	3 642	3 517	3 429	3 341	3 190	3 312	3 281	– 16.15
IT	5 375	5 139	4 968	5 013	4 892	4 824	4 707	4 588	4 776	5 025	– 6.51
LT	542	539	565	671	783	788	783	787	837	886	63.47
LU	153	161	187	206	218	217	221	221	233	220	43.79
LV	465	458	460	474	469	480	457	437	452	480	3.23
MT	53	60	61	82	83	89	88	98	151	172	224.53
NL	3 912	3 916	3 933	3 896	3 953	3 979	3 953	3 947	3 858	3 959	1.20
PL	6 400	6 420	6 369	6 451	6 615	7 154	7 030	6 811	6 764	6 399	– 0.02
PT	1 675	1 684	1 673	1 719	1 706	1 741	1 787	1 793	1 892	2 011	20.06
RO	2 908	2 991	2 925	2 878	2 913	2 914	2 872	2 893	3 494	3 679	26.51
SE	6 798	6 925	6 901	7 029	7 043	6 204	6 433	6 715	7 236	6 983	2.72
SI	581	568	569	585	591	588	570	564	539	540	– 7.06
SK	3 499	3 597	3 376	3 261	3 220	3 176	3 166	3 082	2 955	2 937	– 16.06

Notes: MS, Member State. The data in bold are estimates based on the available individual Member State data. For Ireland, no data were published until 2020.

Source: Eurostat, SBS database.

1.4. Industrial relations in the graphical sector

The workforce in the graphical sector is unionised in 24 of the 27 Member States, with no unions recorded in Bulgaria, Estonia or Lithuania. As Table 13 shows, there are generally one or two trade unions per Member State in this sector, with three or more unions being recorded in six Member States: Belgium, Finland, France, Portugal, Spain and Sweden. For the three Member States with no trade unions organising the graphical workforce, the main reason is the small size of companies, according to the information collected by the Network of Eurofound Correspondents (see Table 56 in the Annex).

Of the 24 Member States with a trade union, union density can be calculated only for 12, given that no union membership data were provided for 7 Member States (France, Germany, Italy, Latvia, Luxembourg, the Netherlands and Sweden), the membership data cover more than the graphical sector in 4 Member States (Denmark, Greece, Spain and Sweden) and data on the number of employees in the sector are not available for Poland. For 4 of the 12 Member States where trade union membership can be estimated, union density is below 5 % (2.8 % in Czechia, 4.9 % in Hungary, 4.1 % in Romania and 2.7 % in Slovakia). The main reasons for this small rate are the small size of companies (as reported in Czechia, Hungary and Romania) and the absence of advantages of having a strong union (e.g. collective bargaining at the sectoral level) as reported in Slovakia (see Table 56 in the Annex).

For three Member States (Croatia, Cyprus and Portugal), union density is above 5 % but below 15 %. The decline in the sector's activity (Cyprus), the decrease in company size (Croatia) and the absence of sectoral collective bargaining (Portugal) make unionisation unattractive in these Member States. In Austria and Slovenia, union density is close to 30 %. In Slovenia, the small size of companies makes organising workers more difficult. In Belgium, Finland and Malta, union density exceeds 75 %. In all three Member States, the unionisation of blue-collar workers is high; Finland is trying to attract white-collar workers. Other Member States for which no trade union density is available report that the absence of collective bargaining appears to make organising difficult (Greece), that there is free riding by employees as collective agreements get extended (the Netherlands) and that employees find working conditions good and do not see the need to belong to a trade union (Latvia).

In several Member States, unions use some form of communication to advertise the advantages of being a trade union member (see Table 57 in the Annex). The benefits resulting from a collective agreement are generally put forward. However, trade unions also use other means to attract members, such as consumer discounts. In three Member States (France, Hungary and Spain), unions use training activities to attract members.

Table 13: Organisational density of trade unions in the graphical sector

MS	Number of sector employees, 2019	Number of unions covered by the data / total (%)	Number of trade union members in the sector	Density based on trade union data (%)
AT	6 853	1/1 (100)	2 000	29.2
BE	6 532	2/5 (40)	5 240	80.2
BG	8 774	0/0 (0)	0	0
CY	900	2/2 (100)	132	14.7
CZ	19 428	1/1 (100)	550	2.8
DE	110 914	1/1 (100)	n/a	n/a
DK	4 406	2/2 (100)	13 900 (HK Privat, with 12 150 members, also has members outside the graphical sector)	Cannot be calculated, as employment and trade union membership do not refer to the same sector
EE	2 500	0/0 (0)	0	0
EL	7 195	1/1 (100)	4 350 (also covers the paper sector)	Cannot be calculated, as employment and trade union membership do not refer to the same sector
ES	78 438	4/8 (50)	251 823 (also covers sectors other than the graphical sector)	Cannot be calculated, as employment and trade union membership do not refer to the same sector
FI	23 540	3/3 (100)	17 990	76.4
FR	39 723	0/5 (0)	0	n/a
HR	6 000	1/1 (100)	800	13.3
HU	15 696	1/1 (100)	774	4.9
IE	8 994	0/2 (0)	0	0
IT	75 050	0/3 (0)	0	n/a
LT	3 776	0/0 (0)	0	n/a
LU	n/a	0/2 (0)	0	n/a
LV	3 589	0/2 (0)	0	n/a
MT	1 731	1/1 (100)	1 400	80.9

MS	Number of sector employees, 2019	Number of unions covered by the data / total (%)	Number of trade union members in the sector	Density based on trade union data (%)
NL	19 400	0/3 (0)	0	n/a
PL	n/a	1/1 (100)	3 000	Data on the number of sector employees are not available
PT	12 500	4/4 (100)	1 102	8.8
RO	12 900	1/1 (100)	535	4.1
SE	5 856	6/6 (100)	21 040 (also covers the paper sector)	n/a
SI	4 282	2/2 (100)	1 260	29.4
SK	4 372	1/1 (100)	120	2.7
EU-27	483 349			

Notes: MS, Member State; n/a, data not available. Estimates for union density are calculated in those instances in which membership data are available for all unions active in the Member State and where both union membership and employment refer to the graphical sector exclusively. For **Denmark**, the membership data for HK Privat are not exclusively for the graphical sector but also include data on related sectors (e.g. the paper sector). The trade union 3F in Denmark has 1 750 members employed in the graphical sector. In **Greece**, OMBTX has 4 350 members, some of whom work in the paper sector. In **Spain**, the membership figure refers to four of the six unions active in the sector. For two of these (FI-USO and LAB), membership covers other sectors besides the graphical sector. In **Sweden**, Pappers (13 000), one of the six unions active in the sector, has members from outside the graphical sector and, thus, an estimate of union density is not calculated.

Source: Network of Eurofound Correspondents, 2023.

The representation of companies by employer organisations is similar to that of unions, with most Member States having one or two employer organisations in the graphical sector (Table 14). The distribution of employer organisations across Member States is much more homogeneous than the distribution of trade unions. There is only one Member State with no such organisation (Greece) and there are only three Member States (Austria, Italy and Spain) with three employer organisations. Nine of the remaining 23 Member States have two employer organisations, while 14 have one.

Employer organisation density in terms of the number of companies that are members of the employer organisations as a percentage of the total number of companies in the sector (calculated based on the data collected through the Network of Eurofound Correspondents) shows more variation across Member States. Eleven Member States out of the 26 with an employer organisation have a density of 5 % or lower. Four of the 26 Member States with an employer organisation have a density of over 5 % but lower than 10 %. Six Member States (Finland, France, Luxembourg, Malta, Spain and Sweden) have an employer organisation density of over 20 %.

Employer organisation density in terms of the workforce is calculated using the data provided by the Network of Eurofound Correspondents on the number of people employed in companies that are employer organisation members. This density is presented in the final column of Table 14. For 11 of the 19 Member States for which this information is available, the employer organisation density in terms of the workforce is over 40 %. Surprisingly, the density is not high in the Member States in which the CR3 index presented in Table 9 is also high, suggesting that membership in the employer organisations is broader than just in the largest three firms in the sector.

Table 14: Organisational density of employer organisations/ business associations in the graphical sector

MS	Number of companies in the sector, 2021	Number of employer organisations (5) covered by the data / total (%)	Number of companies covered by the employer organisations	Density in terms of the number of graphical companies belonging to the employer organisations (%)	Density in terms of the graphical workforce employed in employer organisation member companies (%) (6)
AT	149	2/3 (66.67)	250	n/a	~ 50
BE	5 998	2/2 (100)	~ 300	5.00	n/a
BG	947	1/1 (100)	92	9.71	10.00
CY	250	1/1 (100)	10	4.00	16.67
CZ	12 304	1/1 (100)	39	0.32	20.85
DE	10 295	0/1	n/a	n/a	n/a
DK	843	2/2 (100)	168	19.93	63.55
EE	380	1/1 (100)	30	7.89	42.40
EL	1 032	0/0	0	0.00	0.00
ES	12 958	3/3 (100)	3 230	24.93	44.62
FI	850	2/2 (100)	175	20.59	70.00
FR	3 772	2/2 (100)	841	22.30	49.56
HR	800	1/1 (100)	10	1.25	18.00
HU	3 637	1/1 (100)	68	1.87	63.39
IE	1 480	1/1 (100)	n/a	n/a	n/a
IT	13 050	3/3 (100)	1 077	8.25	51.24
LT	324	1/1 (100)	16	4.94	52.97

(5) Both business associations, focusing on the business and commercial aspects of the industry, as well as employer organisations focused on social matters, were included in the density calculation.

(6) Density calculated based on data provided by the Network of Eurofound Correspondents.

MS	Number of companies in the sector, 2021	Number of employer organisations (5) covered by the data / total (%)	Number of companies covered by the employer organisations	Density in terms of the number of graphical companies belonging to the employer organisations (%)	Density in terms of the graphical workforce employed in employer organisation member companies (%) (6)
LU	64	1/1 (100)	23	35.94	n/a
LV	427	1/1 (100)	28	6.56	n/a
MT	196	2/2 (100)	62	31.63	83.77
NL	3 165	2/2 (100)	18	0.57	53.46
PL	16 924	2/2 (100)	180	1.06	n/a
PT	2 300	1/1 (100)	242	10.52	11.2
RO	2 454	1/1 (100)	58	2.36	17.05
SE	2 692	2/2 (100)	1 000	37.15	n/a
SI	1 122	2/2 (100)	14	1.25	8.00
SK	1 942	1/1 (100)	30	1.54	27.45
EU-27	100 355				

Note: MS, Member State; n/a, data not available.

Source: Network of Eurofound Correspondents, 2023.

Looking at factors that hinder the organisation of companies in employer organisations, there are 20 Member States that report some factor that hinders the organisation of graphical sector companies in employer organisations (see Table 58 in the Annex). In most cases (13 Member States), the small size of companies (including the large number of self-employed people in the sector, in some instances) is reported as to blame. Other reasons that hinder the organisation of companies in employer organisations are that companies might be expecting little from an employer organisation (Estonia), the decline in the sector (Cyprus) and limited collective bargaining in the sector (Portugal). Small companies are deemed to be more difficult to organise than larger companies, both for financial reasons and because of a lack of personnel capacity. At the same time, in Romania, membership in an employer organisation is reported to be treated with suspicion, as firms fear they will lose their competitive advantage in a sector with intense competition.

Finally, Table 15 provides an overview of the collective bargaining coverage in the graphical sector. In eight Member States (Bulgaria, Czechia, Estonia, Greece, Latvia, Lithuania, Romania and Slovakia), there is either no collective bargaining (Bulgaria, Estonia, Latvia and Lithuania) or the collective bargaining coverage – either single- or multi-employer bargaining – is 10 % or less. In 14 Member States, there is no multi-employer bargaining. These are, in general, either Member States in which there is no union (Bulgaria, Estonia and Lithuania) or Member States in which trade union density is very low (Croatia, Czechia, Greece, Hungary, Portugal, Romania and Slovakia), as indicated in Table 13. There are also instances, such as Malta, where trade union density is very high but, despite that, there is no multi-employer bargaining. In 12 Member States (Austria, Belgium, Cyprus, Denmark, Finland, France, Italy, the Netherlands, Portugal, Spain, Slovenia and Sweden), there is stand-alone multi-employer bargaining. In five Member States (Austria, France, Luxembourg, Romania and Spain) there is an extension mechanism that permits collective agreements to be extended to all workers in the sector.

Table 15: Collective bargaining coverage and extension mechanism

MS	% of sector workforce covered by collective bargaining		Workforce in the largest company with SEB as a % of sectoral workforce	Does a mechanism exist that makes collective bargaining agreements generally binding?	Is an extension mechanism implemented in the graphical sector (covering all workers)?	Are there criteria to take part in an extension mechanism?	Are there criteria to take part in SEB?	Is there bipartite social dialogue?	Is there tripartite social dialogue?
	SEB + MEB	MEB							
AT	10–15	10–15	No SEB	Yes	Yes	Yes	No	Yes	No
BE	96–100	96–100	7.76	No	No	No	Yes	Yes	No
BG	0	0	No SEB	No	No	No	No	No	No
CY	> 16.6	> 16.6	No SEB	No	No	No	No	No	No
CZ	10 (SEB only)	0	6.32	Yes	Not relevant – there is no sectoral agreement in the sector	Not relevant	No	Yes	No
DE	> 10	No information	No information	Yes	No	No	No	No	No
DK	80–85	80 (estimate)	No information	No	No	No	No	No	Yes
EE	0	0	No information	Yes	No	No	No	No	No
EL	1.40	0	2.71	Yes	Not relevant – there is no sectoral agreement in the sector	Yes	Yes	No	No
ES	100	100	3.61	Yes	Yes	No	No	No	Yes
FI	59.2	59.20	No SEB	Yes	No	Yes	No	Yes	Yes
FR	100	100	5.03	Yes	Yes	Yes	Yes	Yes	No
HR	30–35	0	6.33	Yes	No	No	No	Yes	No
HU	18–21	0	4.31	Yes	No	Yes	Yes	Yes	No
IE	43	0	8.89	No	No	No	No	No data	No data
IT	~ 100	~ 100	No information	No	No	No	No	Yes	Yes
LT	0	0	No SEB	No	No	No	No	No	No
LU	Impossible to estimate	Impossible to estimate	No data	Yes	Yes	Yes	Yes	No	No
LV	0	0	No SEB	Yes	No	Yes	No	No	No
MT	70	0	28.89	No	No	Yes	Yes	No	No
NL	No information	83	No information	No	No	No	No	Yes	No

MS	% of sector workforce covered by collective bargaining		Workforce in the largest company with SEB as a % of sectoral workforce	Does a mechanism exist that makes collective bargaining agreements generally binding?	Is an extension mechanism implemented in the graphical sector (covering all workers)?	Are there criteria to take part in an extension mechanism?	Are there criteria to take part in SEB?	Is there bipartite social dialogue?	Is there tripartite social dialogue?
	SEB + MEB	MEB							
PL	No information	0	No information	No	No	No	No	No	No
PT	~ 58–100	~ 55	5.79	Yes	No	No	No	No	No
RO	< 4 (SEB only)	0	3.3	Yes	Yes	Yes	Yes	Yes	No
SE	80–90	80–90	No SEB	No	No	No	No	No	No
SI	50	50	18.68	Yes	No	Yes	Yes	No	No
SK	10	0	9.79	No	No	No data	No	No data	No data

Notes: MEB, multi-employer bargaining; MS, Member State; SEB, single-employer bargaining. In **Austria**, there is informal, not institutionalised, bilateral dialogue. In **Belgium**, there is no automatic mechanism, but general practice. In **Ireland**, the percentage covered by collective bargaining refers to Ireland as a whole. In **Greece**, legislation permits the extension of collective agreements in general, subject to a threshold of the employees covered, but there is no sectoral collective agreement in the graphical sector.

Source: Network of Eurofound Correspondents, 2023.

2. National level of representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the graphical sector, as summarised in Figure 9. The Network of Eurofound Correspondents identified 59 sector-related trade unions in the graphical sector in 24 Member States. In three Member States (Bulgaria, Estonia and Lithuania), there is no trade union in the graphical sector. Thus, the average number of trade unions in the Member States with a trade union in the graphical sector is 2.5. In certain Member States, the number of trade unions active in the graphical sector is high: eight in Spain, six in Sweden, five in Belgium and France and four in Portugal. However, 10 Member States have a single trade union in the graphical sector. The Network of Eurofound Correspondents identified 48 sector-related employer organisations or business associations in the graphical sector in 26 Member States. As previously mentioned, only in Greece is there no organisation representing the employers in the graphical sector. Thus, the average number of employer organisations / business associations in the Member States with such an organisation in the graphical sector is 1.8. In certain Member States, the number of employer organisations / business associations is high: five in Austria, Poland and Spain and three in Italy. However, in 14 Member States, there is only one employer organisation / business association. A list of all national trade unions is available in Table 20, while Table 62 in the Annex provides the full names in the original language and in English for trade unions. Similarly, the employer organisations / business associations are listed in Table 25, and Table 63 in the Annex provides the full names in the original language and in English for employer organisations / business associations.

Figure 9: Number of trade unions and employer organisations in the graphical industry, 2023

Number of trade unions / professional associations in the graphical sector in the MS	MS	Number of employer organisations / business associations in the graphical sector in the MS
1	AT	5
5	BE	2
0	BG	1
2	CY (7)	1
1	CZ	1
1	DE	1
2	DK	2
0	EE	1
1	EL	0
8	ES	5
3	FI	2
5	FR	2
1	HR	1

(7) In Cyprus, the Cyprus Association of Publishers of Newspapers and Magazines, which is a signatory of a collective bargaining agreement in the publishing sector, was not included in the study, as it did not provide any input to the Eurofound correspondent.

Number of trade unions / professional associations in the graphical sector in the MS	MS	Number of employer organisations / business associations in the graphical sector in the MS
1	HU	1
2	IE	1
3	IT	3
0	LT	1
2	LU	1
2	LV	1
1	MT	2
3	NL	2
1	PL	5
4	PT	1
1	RO	1
6	SE	2
2	SI	2
1	SK	1
59	EU-27	**48**

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

The number of sector-related trade unions and employer organisations has increased somewhat compared with the 2016 graphical sector representativeness report (which presents information for 2015): 59 trade unions in 2023 compared with 54 in 2015 and 48 employer organisations / business associations in 2023 compared with 42 in 2015 (Table 16 and Table 17). In the three Member States reporting no trade union in the 2016 report (Bulgaria, Estonia and Slovakia), the situation has not changed for the first two, while Slovakia now has a trade union. The increase in the overall number of trade unions is due to the increase in the number of unions in Belgium, Denmark, Finland, Slovakia, Spain and Sweden.

Some of these increases are explained by the more accessible public information available on the national-level organisations, which allowed the Network of Eurofound Correspondents to identify the relevant active organisations. In other cases, new organisations have emerged. In other Member States, namely France, Greece, Italy, Lithuania, Malta and Poland, the number of trade unions active in the graphical sector decreased by one. In Italy the trade union UGL Carta e Stampa (General Labour Union for Paper and Printing), which was included in the previous study for the sector, has lost its members in the sector, as is the case for NSZZ ‘Solidarnosc’ in Poland. In France, the FASAP-FO union currently only represents journalists, and thus was also deemed not sector-related. In Lithuania, the decline means that no union is now involved in the graphical sector: LKDPF, which was active in the graphical sector in 2015, no longer has members in the graphical sector; instead its members are employees of libraries and museums.

Table 16: Comparative overview of the number of national trade unions organising workers in the graphical sector in each Member State, 2015 and 2023

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
2023	1	5	0	2	1	1	2	0	1	8	3	5	1	1
2015	1	3	0	2	1	1	1	0	2	4	2	6	1	1
	IE	**IT**	**LT**	**LU**	**LV**	**MT**	**NL**	**PL**	**PT**	**RO**	**SE**	**SI**	**SK**	**EU-27**
2023	2	3	0	2	2	1	3	1	4	1	6	2	1	**59**
2015	2	4	1	2	2	2	3	2	4	1	4	2	0	**54**

Note: Red font indicates differences in the number of organisations between 2015 and 2023.

Source: Network of Eurofound Correspondents, 2015 and 2023.

The number of employer organisations identified in the sector in 2015 and 2023 increased from 42 to 48. However, the distribution of employer organisations across Member States has changed. While Croatia, Lithuania, Poland, Romania and Slovakia had no employer organisations in the sector in 2015, in 2023, all of them recorded at least one. Greece, however, with one employer organisation recorded in the 2016 report, now has no employer organisations in the sector, as the organisation included in the previous study lost its members in the graphical sector.

Table 17: Comparative overview of the number of national employer organisations with member companies in the graphical sector in each Member State, 2015 and 2023

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
2023	5	2	1	1	1	1	2	1	0	5	2	2	1	1
2015	3	2	1	2	1	1	1	1	1	4	1	3	0	1
	IE	**IT**	**LT**	**LU**	**LV**	**MT**	**NL**	**PL**	**PT**	**RO**	**SE**	**SI**	**SK**	**EU-27**
2023	1	3	1	1	1	2	2	5	1	1	2	2	1	**48**
2015	1	8	0	1	2	1	2	0	1	0	2	2	0	**42**

Note: Red font indicates differences in the number of organisations between 2015 and 2023.

Source: Network of Eurofound Correspondents, 2015 and 2023.

2.1. National trade union membership domain and strength

This section presents and discusses the picture of the trade unions in the graphical sector in the individual Member States. Turning first to the activities in which the graphical sector trade unions have members, Table 18, Table 19 and Figure 10 show the coverage of national trade unions in terms of activities and occupational categories. In all 24 of the Member States that have a trade union in the graphical sector, trade unions exist in the subsectors printing of newspapers and printing of magazines (Table 18). Conversely, in quite a few Member States, trade unions in the graphical sector are not involved in printing on less commonly used media (e.g. wallpaper and other surfaces).

Table 18: Scope of membership domains of sectoral trade unions, 2023

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services	Binding of printed material	Other printing	Printing of catalogues and other commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Number of trade unions active in the sector	47	44	47	40	40	41	40	38	24	33	32	33	29	33	28	25	34
Number of trade unions not active in the sector	6	9	6	13	13	12	13	12	26	17	20	19	25	22	27	28	19
Number of Member States in which trade unions cover this activity	24	24	24	24	23	24	23	24	19	21	22	22	20	21	18	20	21
Member States in which no trade union covers this activity	BG, EE, LT	BG, EE, LT	BG, EE, LT	BG, EE, LT	BG, CY (*), EE, LT	BG, EE, LT	BG (*), CZ, DK, EE	BG, EE, LT (*)	BG, CY, CZ, EE (*), FI, FR (*), LT (*), PL (*)	BG, CY (*), CZ, EE, LT (*), PL	BG, CZ, EE, FI, LT	BG, CY, CZ, EE, LT	BG (*), CY (*), CZ, EE, FI (*), LT, PL (*)	BG, CY, CZ, EE, LT (*), PL	BG (*), CY (*), CZ, EE, EL (*), FI, FR (*), LT (*), PL	BG, CY, CZ, EE, FI, LT, PL	BG, CZ, EE (*), FI (*), LT (*), PL (*)

(*) Member States in which the activity in question is not considered part of the graphical sector. A complete list of the activities that are considered part of the graphical sector in each Member State is available in Table 54 in the Annex.

Notes: For two unions in the Netherlands, no information on the coverage of subsectors is available.

Source: Network of Eurofound Correspondents, 2023.

Most trade unions cover workers from more than one activity. Of the 51 trade unions active in the sector for which data on covered activities are available, 15 (28 %) organise workers in all 17 graphical sector activities listed in Table 18 (Figure 10a). Seventeen unions (32 %) cover 11–16 activities, 11 unions (21 %) cover 6–10 activities and 10 unions (19 %) cover 1–5 activities.

Turning to the features of the trade unions active in the sector, Table 19 presents information on the size of the companies in which most union members are present, their geographical dispersion, the types of workers the unions organise and other activities besides the graphical sector in which the trade unions are present. There is information available for 39 of the 59 trade unions on whether most trade union members are active in large companies or small companies or if trade unions are equally representative in large and small companies. The three categories are mutually exclusive. Most trade unions (26 out of 39; 67 %) are equally present in large and small companies. As most companies in the sector are small (see Chapter 1), the distribution of trade unions across firms of different sizes suggests that a large part of the sector is not unionised.

As regards the regional presence of trade unions, information is available for 56 out of the 59 trade unions on their geographical presence: 52 trade unions (88 %) organise members in the entire Member State. Out of the 51 trade unions for which data on existence of regional substructures are available, less than half (25) have such substructures.

Information on the occupational groups that the sectoral trade unions organise was available for 54 unions (Table 19) in 22 Member States. As regards all three of the unions active in the Netherlands and the one in Slovakia, none has provided data on the occupational groups of their members. Blue-collar workers are covered by more trade unions than the other three occupational groups covered here. Of all of the trade unions in the 22 Member States for which data are available on the occupational groups covered, 49 (91 %) organise blue-collar workers. There are five trade unions that do not organise blue-collar workers: one in Belgium, one in Finland and three in Sweden. White-collar workers are covered by 44 unions in 21 Member States. Twenty-seven trade unions cover management staff in 11 Member States (Austria, Belgium, Denmark, Finland, France, Germany, Latvia, Luxembourg, Portugal, Slovenia and Sweden). Finally, only 10 trade unions in six Member States (Austria, Cyprus, Denmark, Finland, Italy and Portugal) cover self-employed workers.

Only seven trade unions (13 %) organise workers in all four occupational categories (blue-collar workers, white-collar workers, management staff and self-employed workers; see Figure 10b). Three of these are in Portugal (Fiequimetal, SIMA and Sinttav), two are in Finland (SJL and Teollisuusliitto), one is in Austria (GPA) and one is in Denmark (HK Privat). On the other hand, nine trade unions (17 %) organise workers from only a single occupation. Of these unions, five are in Sweden, which traditionally has segregated trade unions (three for blue-collar workers, one for white-collar workers and one for management staff), two are in Ireland (both organising only blue-collar workers) and there is one each in Belgium and Denmark (both organising blue-collar workers). The low number of trade unions that organise all four occupations is explained by the low representation of self-employed workers in the sector (10 unions). The number of trade unions that organise blue-collar workers, white-collar workers and managerial staff is 16. In terms of other activities in which the trade unions active in the graphical sector also have members, 30 unions in 18 Member States also organise the packaging sector (see Table 19).

Table 19: Trade union coverage by workforce categories, company size groups, geographical coverage and additional sectors of activity in the graphical sector

Criterion	Classification	Number of trade unions	Number of MSs in which the trade unions in the previous column are located	Number of trade unions for which information is available
Company size (39) (8)	Large	10	8	39 trade unions located in 20 MSs. (The following MSs have missing information for all trade unions: BE, IE, NL and SK. The following MSs have no trade unions: BG, EE and LT.)
	Small	3	3	
	Equally representative for large and small	26	12	
Geographical coverage	Entire Member State (56) (9)	52	23	56 trade unions located in 23 MSs. (The following MS has missing information for all trade unions: SK. The following MSs have no trade unions: BG, EE and LT.)
	Regional substructure (51) (10)	25	21	51 trade unions located in 21 MSs. (The following MSs have missing information for all trade unions: IE, RO and SK. The following MSs have no trade unions: BG, EE and LT.)
Type of workers the trade union is organising (54) (11)	Blue collar	49	22	54 trade unions in 22 MSs. (The following MSs have missing information for all trade unions: NL and SK. The following MSs have no trade unions: BG, EE and LT.)
	White collar	44	21	
	Management	27	11	
	Self-employed	10	6	
Other sectors in which trade unions have members (51) (12)	Paper	29	17	All trade unions in 24 MSs (no information is available for those in IE, NL and RO).
	Audiovisual	25	15	
	Commerce	19	13	
	Logistics	22	14	
	Transport	19	12	
	Postal and courier	22	14	
	Graphic design advertising	27	15	
	Photographers	17	11	
	Production of signage and luminous signs	17	11	
	Video game production	15	9	
	Production of packaging (including corrugated)	30	18	

(8) The 20 unions for which information is missing are in Belgium (five unions), Ireland (two unions), Italy (one union), Latvia (one union), the Netherlands (three unions), Portugal (one union), Slovakia (one union), Spain (five unions) and Sweden (one union).

(9) The three unions for which information is missing are in Latvia, the Netherlands and Slovakia.

(10) The eight unions for which information is missing are in Belgium (one union), France (one union), Ireland (two unions), Latvia (one union), the Netherlands (one union), Romania (one union) and Slovakia (one union).

(11) The five unions for which information is missing are in Latvia (one union), the Netherlands (three unions) and Slovakia (one union).

(12) The six unions for which information is missing are in Ireland (two unions), the Netherlands (three unions) and Slovakia (one union).

Criterion	Classification	Number of trade unions	Number of MSs in which the trade unions in the previous column are located	Number of trade unions for which information is available
	Production of other packaging	23	16	

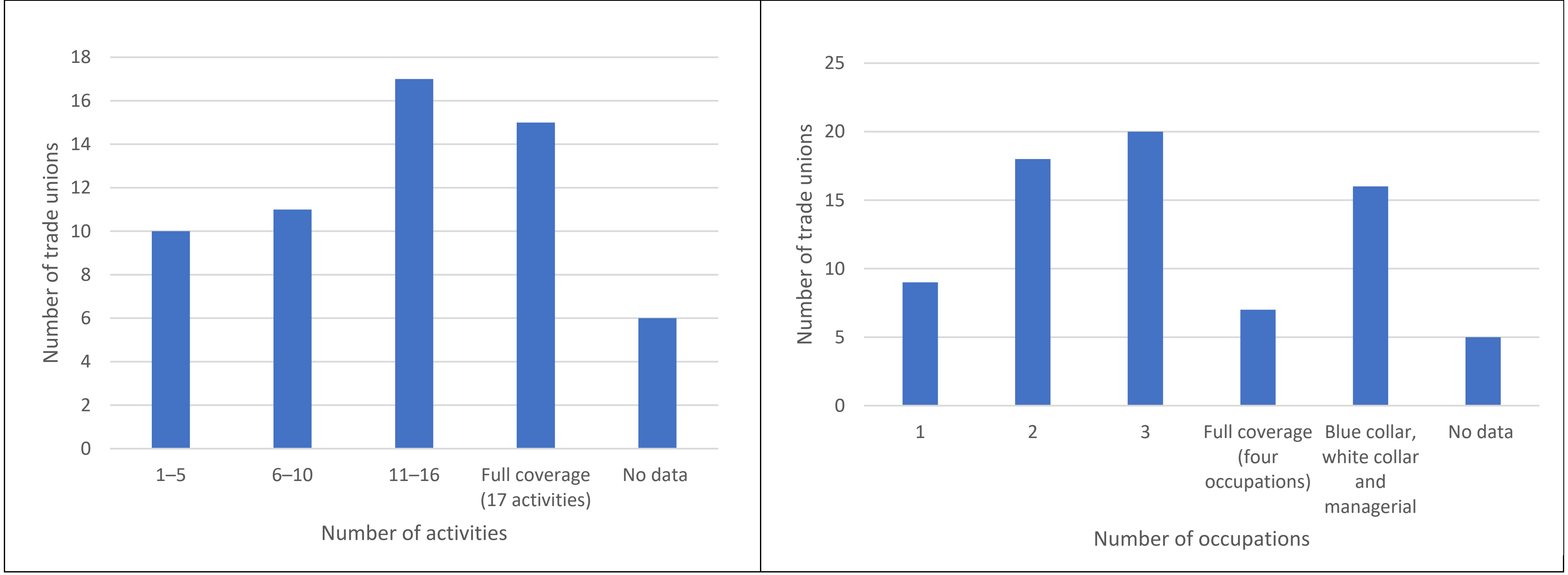
Notes: MS, Member State. The company-size classification is the only one for which different categories are mutually exclusive. The number in brackets in the 'Criterion' column is the number of trade unions for which this information is not missing.

Source: Network of Eurofound Correspondents, 2023.

Figure 10: Activities and occupations covered by the trade unions, 2023

(a) Scope of trade union coverage in terms of activities

(b) Scope of trade union coverage in terms of occupations



Source: Network of Eurofound Correspondents, 2023.

Table 20 provides an overview of the membership strength of the 59 trade unions. It includes information on the number of members – with a qualification of the type of data – and an indication of the trend in membership over the last two or three years. The information on membership strength is missing for 24 trade unions and, for 12 trade unions, this information is estimated, thus leaving 23 trade unions for which we have actual figures. Even in instances when a specific number was provided, the figures supplied often contain members of the union from other industrial sectors (i.e. the paper sector). The information on the membership trend is more informative. Such information is available for 32 of the 59 trade unions. For 15 trade unions, membership is reported to be decreasing; for 11 trade unions, membership is stable; and, for six trade unions, membership is increasing. The trend is not the same for all unions in a Member State; those unions for which membership is increasing are, in most cases, located in Member States that have more than one union, and the increasing trend is observed for only one of the trade unions.

Table 20: Membership strength of the trade unions, 2023

MS	Trade union	Number of employees in the sector who are members of the trade union	Type/source of information on the number of members		Membership trend in the last two or three years
			Exact number	Estimate	
AT	GPA	2 000	n/r	X	Decreasing
BE	ACV-CSC BIE	2 740	X	n/r	n/a
	ABVV-FGTB BBTK-SETCa	2 500	X	n/r	n/a
	ACLVB-CGSLB	n/a	n/a	n/a	n/a
	ACV-CSC Puls	n/a	n/a	n/a	n/a
	ACV-CSC CNE	n/a	n/a	n/a	n/a
CY	ΣΕΒΕΤΤΥΚ	62	X	n/r	n/a
	OBIEK-SEK	70	X	n/r	Decreasing
CZ	TB	550	X	n/r	n/a
DE	Ver.di	n/a	n/a	n/a	Decreasing
DK	HK Privat	10 400 (13)	n/r	X	Stable
	3F	1 750	X	n/r	Stable
EL	OMTBX	4 350 (14)	n/r	X	n/a
ES	FSC-CCOO	80 000 (15)	X	n/r	Stable
	CCOO-Industria	n/a	n/a	n/a	n/a
	UGT-SP	n/a	n/a	n/a	n/a
	UGT-FICA	n/a	n/a	n/a	n/a
	UGT-FeSMC	n/a	n/a	n/a	n/a
	ELA – Industria eta Eraikuntza	823	X	n/r	Increasing
	FI-USO	126 000 (16)	X	n/r	n/a

(13) This estimate includes members in other sectors (both private and public) besides graphical, namely paper, audiovisual, commerce, logistics, transport, postal and courier, creative agencies, advertising, graphic designers, photographers, production of signage (print or digital) and luminous signs, production of video games, production of paper packaging (including corrugated packaging), production of other packaging (other than paper and corrugated), administration, retail, ICT and services.
(14) This figure is that for the graphical sector combined with the paper sector.
(15) This estimate includes members from other sectors besides graphical, namely paper, audiovisual, logistics, transport, postal and courier sector, creative agencies, advertising, graphic designers, photographers (except communication media), production of signage (print or digital) and luminous signs, production of video games, production of paper packaging (including corrugated packaging) and production of other packaging (other than paper and corrugated).
(16) This includes members from other sectors besides graphical, namely paper and audiovisual. More information has not been provided.

MS	Trade union	Number of employees in the sector who are members of the trade union	Type/source of information on the number of members		Membership trend in the last two or three years
			Exact number	Estimate	
	LAB	45 000 ([17])	n/r	X	n/a
FI	Teollisuusliitto	13 500	n/r	X	Increasing
	PRO	990	X	n/r	Decreasing
	SJL	3 500	n/r	X	Decreasing
FR	Filpac CGT	n/a	n/a	n/a	n/a
	Fédération FO Livre	n/a	n/a	n/a	Stable
	F3C-CFDT	n/a	n/a	n/a	Decreasing
	FC-CFTC	n/a	n/a	n/a	Increasing
	IP-CFE-CGC	n/a	n/a	n/a	n/a
HR	SGIM	800	X	n/r	Decreasing
HU	NYDSZ	774	X	n/r	Increasing
IE	SIPTU	n/a	n/a	n/a	n/a
	Unite	n/a	n/a	n/a	n/a
IT	SLC-CGIL	n/a	n/a	n/a	Stable
	Fistel-CISL	n/a	n/a	n/a	Decreasing
	Uilcom-UIL	n/a	n/a	n/a	n/a
LU	LCGB-Services	n/a	n/a	n/a	Decreasing
	OGB-L – imprimerie, médias, culture, FLTL	n/a	n/a	n/a	Decreasing
LV	LKDAF	n/a	n/a	n/a	n/a
	LPNA	50	X	n/r	Decreasing
MT	GWU	1 400	n/r	X	Stable
NL	FNV Media en Cultuur	n/a	n/a	n/a	n/a
	De Unie	n/a	n/a	n/a	n/a
	CNV	n/a	n/a	n/a	n/a
PL	ZZP	3 000	n/r	X	n/a
PT	Fiequimetal	800	n/r	X	n/a
	Sindetelco	200	n/r	X	n/a
	Sinttav	72	X	n/r	Increasing
	SIMA	30	n/r	X	Decreasing
RO	USTR	535	X	n/r	n/a
SE	GS	6 109	X	n/r	Stable
	Unionen	1 290	X	n/r	Increasing
	Ledarna	641	X	n/r	Stable
	Pappers	13 000 ([18])	X	n/r	Decreasing
	SI	50	X	n/r	Decreasing
	SEKO	200	n/r	X	Stable
SI	SGDS	400	X	n/r	Stable
	Pergam	860	X	n/r	Stable
SK	SOZPP	120	X	n/r	Decreasing

Notes: MS, Member State; n/a, data not available; n/r, not relevant. Italic font indicates unions that are active only in part of the Member State.

Source: Network of Eurofound Correspondents, 2023.

([17]) This estimate includes members from other sectors besides graphical, namely paper, audiovisual, logistics, transport, and postal and courier.

([18]) Most members are from the paper, not the graphical, sector.

2.2. Involvement of national trade unions in collective bargaining

This section considers the involvement of the 59 trade unions in collective bargaining, as summarised in Table 21. Trade unions can be involved in signing agreements at either the enterprise level (single-employer bargaining (SEB)) or the sectoral level (multi-employer bargaining (MEB)). Information on whether any type of bargaining takes place is available for 52 unions.

Table 21: Overview of graphical sector trade unions' involvement in collective bargaining in the EU-27, 2023

Involvement in collective bargaining	Member States	Number of trade unions
All unions engage only in SEB	CZ, HR, HU, IE, LV ([19]), MT, PL, RO, SK	10
All unions engage only in MEB	AT, CY, FI, SE	12
All unions engage in both SEB and MEB ([20])	BE, DE, ES, FR, IT, SI	20
Some unions engage in SEB, while other unions engage in MEB	DK, ES, LU, PT	14
No collective bargaining	EL, LV ([13])	2
No data on involvement in either SEB or MEB	Four unions in ES, one union in NL	5
No data on involvement in SEB	One union in NL, one union in SE	2

Note: The numbers in last column are not mutually exclusive. For the two trade unions for which information is available regarding the existence of MEB but not on whether SEB also takes place (De Unie in NL and Pappers in SE), these have been allocated (but not counted) with the majority of the unions in each Member State.

Source: Network of Eurofound Correspondents, 2023.

Looking at this in more detail, in approximately half of the Member States, all trade unions follow the same type of collective bargaining: in eight Member States, there is only SEB (not including Latvia, which includes one union negotiating at the employer level and one non-representative union), while in four Member States, unions engage only in MEB (Table 22). In all Member States where unions engage in only SEB except for Ireland, there is only one union in the Member State. In the three Member States where unions engage only in MEB, except for Austria, there is more than one union. In five Member States, all unions engage in both SEB and MEB while, in four Member States, some unions engage in MEB and others engage in SEB. No collective bargaining takes place in Greece.

Regarding the number of trade unions engaged in each type of bargaining, 39 engage in MEB and 35 engage in SEB. Twenty-one unions engage in both MEB and SEB. Only a few Member States have a framework for social dialogue to be conducted on a systematic basis: only in four Member States (Denmark, Finland, Italy and Spain) is there a tripartite social dialogue body, while 10 Member States (Austria, Belgium, Croatia, Czechia, Finland, France, Hungary, Italy, the Netherlands and Romania)

([19]) In Latvia, one of the unions engages in SEB, while the other union is not recognised as representative for collective bargaining and does not bargain and, therefore, is classified, together with Greece, as having no collective bargaining.

([20]) This row refers to the unions for which information is not missing.

have a bipartite dialogue body. In 19 Member States, at least one of the trade unions is part of a confederation at the national level. As a result, 45 trade unions are part of a confederation at the national level. In Member States with more than one trade union, these do not, in most instances, belong to the same confederation at the national level. The five Member States in which no trade union is part of a confederation, or no data on such an affiliation were provided, are Czechia, Ireland, Malta, the Netherlands and Slovakia.

Table 22: List of graphical trade unions' role in the national industrial relations landscape

MS	Trade union	Basis of representativeness	% of workers covered by collective bargaining in the sector	Trade union involvement in collective bargaining?		Involved in social dialogue?		Involved in paritarian organisations?	Consulted by the government on sector-related matters?	Affiliated with a national confederation and, if so, which one?
				MEB	SEB	Bipartite	Tripartite			
Number of unions involved / unions for which information is available				**39/54**	**35/52**	**23/50**	**9/50**	**23/50**	**26/46**	**45/51**
AT	GPA	MR	10–15	Yes	No	Yes	No	No	No	ÖGB
BE	ACV-CSC BIE	LR	96–100	Yes	Yes	Yes	No	Yes	Yes	ACV-CSC
	ABVV-FGTB BBTK-SETCa	LR	96–100	Yes	Yes	Yes	No	Yes	Yes	ABVV-FGTB
	ACLVB-CGSLB	LR	96–100	Yes	Yes	Yes	No	Yes	Yes	ACLVB-CGSLB
	ACV-CSC Puls	LR	96–100	Yes	Yes	Yes	No	Yes	Yes	ACV-CSC
	ACV-CSC CNE	LR	~ 100	Yes	Yes	Yes	No	Yes	Yes	ACV-CSC
CY	ΣΕΒΕΤΤΥΚ	MR	> 16.6	Yes	No	No	No	Yes	No	PEO
	OBIEK-SEK	MR	> 16.6	Yes	No	No	No	Yes	No	SEK
CZ	TB	MR	10	No	Yes	Yes	No	No	No	No
DE	Ver.di	MR	n/a	Yes	Yes	No	No	Yes	Yes	DGB
DK	HK Privat	MR	E: 80–85	Yes	Yes	No	Yes	No	Yes	FH
	3F	MR	E: 80–85	Yes	No	No	Yes	No	Yes	FH
EL	OMTBX	MR and LR	1.40	No	No	No	No	No	No	GSEE
ES	CCOO-Industria	LR (only for the metal graphical sector)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	UGT-SP	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	UGT
	UGT-FICA	LR	100	Yes	Yes	No	Yes	Yes	n/a	UGT
	UGT-FeSMC	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	UGT
	FSC-CCOO	LR	100	Yes	Yes	No	No	Yes	No	CCOO
	ELA – Industria eta Eraikuntza	LR	100	Yes	Yes	No	No	No	No	ELA (active only in the Basque Country)
	FI-USO	LR (only for the metal graphical sector)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	LAB	LR	100	Yes	Yes	n/a	n/a	No	No	LAB (active only in the Basque Country)
FI	Teollisuusliitto	MR	59.20	Yes	No	Yes	Yes	Yes	Yes	SAK
	PRO	MR	59.20	Yes	No	Yes	Yes	No	Yes	STTK

MS	Trade union	Basis of representativeness	% of workers covered by collective bargaining in the sector	Trade union involvement in collective bargaining?		Involved in social dialogue?		Involved in paritarian organisations?	Consulted by the government on sector-related matters?	Affiliated with a national confederation and, if so, which one?
				MEB	SEB	Bipartite	Tripartite			
	SJL	MR	59.20	Yes	No	Yes	Yes	n/a	Yes	No
FR	Filpac CGT	LR	100	Yes	Yes	Yes	No	Yes	Yes	CGT
	Fédération FO Livre	LR	100	Yes	Yes	Yes	No	Yes	Yes	CGT-FO
	F3C-CFDT	LR	100	Yes	Yes	Yes	No	Yes	Yes	CFDT
	FC-CFTC	LR	100	Yes	Yes	Yes	No	Yes	No	CFTC
	IP-CFE-CGC	LR	100	Yes	Yes	Yes	No	Yes	No	CGT
HR	SGIM	LR	30–35	No	Yes	Yes	No	No	No	ITUC
HU	NYDSZ	LR	18	No	Yes	Yes	No	No	No	MASZSZ
IE	SIPTU	n/a	~ 43	No	Yes	n/a	n/a	n/a	n/a	n/a
	Unite	n/a	~ 43	No	Yes	n/a	n/a	n/a	n/a	n/a
IT	SLC-CGIL	MR	~ 100	Yes	Yes	Yes	Yes	Yes	Yes	CGIL
	Fistel-CISL	MR	~ 100	Yes	Yes	Yes	Yes	Yes	Yes	CISL
	Uilcom-UIL	MR	~ 100	Yes	Yes	Yes	Yes	Yes	Yes	UIL
LU	LCGB-Services	LR	n/a	No	Yes	No	No	No	No	LCGB
	OGB-L – imprimerie, médias, culture, FLTL	LR	n/a	Yes	No	No	No	No	No	OGB-L
LV	LKDAF	Not representative	0	No	No	No	No	No	No	FTUCL
	LPNA	MR	0	No	Yes	No	No	Yes	Yes	No
MT	GWU	LR	70	No	Yes	No	No	No	Yes	No
NL	FNV Media en Cultuur	n/a	n/a	Yes	Yes	Yes	No	Yes	n/a	n/a
	De Unie	n/a	n/a	Yes	n/a	Yes	No	No	n/a	n/a
	CNV	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
PL	ZZP	LR	n/a	No	Yes	No	No	No	Yes	OPZZ
PT	Fiequimetal	MR	~ 58	No	Yes	No	No	No	n/a	CGTP

MS	Trade union	Basis of representativeness	% of workers covered by collective bargaining in the sector	Trade union involvement in collective bargaining?		Involved in social dialogue?		Involved in paritarian organisations?	Consulted by the government on sector-related matters?	Affiliated with a national confederation and, if so, which one?
				MEB	SEB	Bipartite	Tripartite			
	Sindetelco	MR	~ 58	Yes	No	No	No	No	n/a	UGT
	Sinttav	MR	~ 58	No	Yes	No	No	No	No	CGTP
	SIMA	MR	~ 58	Yes	No	No	No	No	No	No
RO	USTR	Not representative	< 4	No	Yes	Yes	No	No	No	BNS
SE	GS	MR	80–90	Yes	No	No	No	Yes	Yes	LO
	Unionen	MR	80–90	Yes	No	No	No	Yes	Yes	TCO
	Ledarna	MR	80–90	Yes	No	No	No	No	Yes	No
	Pappers	MR	80–90	Yes	n/a	No	No	No	Yes	LO
	SI	MR	80–90	Yes	No	No	No	No	Yes	TCO
	SEKO	MR	80–90	Yes	No	No	No	No	Yes	LO
SI	SGDS	LR	50	Yes	Yes	No	No	No	No	Pergam
	Pergam	LR	50	Yes	Yes	No	No	No	No	Pergam is itself a national confederation
SK	SOZPP	n/a	10	No	Yes	n/a	n/a	n/a	n/a	n/a

Notes: LR, legal requirement based on national legislation; MR, mutual recognition from trade unions; MS, Member State; n/a, data not available. The trade unions shaded in green correspond to members of UNI Europa Graphical and Packaging.

Source: Network of Eurofound Correspondents, 2023.

2.3. National employer organisation membership domain and membership strength

This section presents and discusses the picture of employer organisations and business associations in the graphical sector in the 27 Member States. In the rest of this section, unless a distinction between an employer organisation and a business association needs to be made, the term employer organisation will be used to include business associations too. The representation of employer organisations and business associations in the graphical sector by activity and type of employment is shown in Table 23 and Figure 11.

The highest number of employer organisations (33 out of the 48) is found in printing of magazines and in pre-press and pre-media services. The sectors with the next highest number of employer organisations are the printing of newspapers, the printing of books and the binding of printed material (32 out of the 48). At the opposite end of the spectrum, the activities with the lowest number of employer organisations are the reproduction of recorded media (7 out of the 48 employer organisations) and printed electronics (10 out of the 48 employer organisations). The picture emerging from Table 23 is similar to that for the trade unions presented in Table 18. However, in some activities in certain Member States, trade unions are present in the graphical sector but employer organisations are not, and vice versa. Focusing on the activities with the largest number of trade unions or employer organisations, the two tables suggest that in France, Poland and Slovenia, there is no employer organisation representing companies active in the printing of newspapers, while there is a union in the sector. Similarly in Slovenia, there is no employer organisation in the printing of books but there is a union.

Most employer organisations cover workers from more than one activity. However, employer organisations have a narrower scope than that of trade unions (Figure 11). Of the 45 employer organisations active in the graphical sector with data on the activities covered, three (7 %) have members in all 17 graphical sector activities listed in Table 23 (as can be seen in Figure 11a). Twenty employer organisations (45 %) cover 11–16 activities, 10 employer organisations (23 %) cover 6–10 activities and 12 employer organisations (27 %) cover 1–5 activities.

Turning to the features of the employer organisations active in the sector, as presented in Table 24, all of the employer organisations identified in this study for which data are available (42) have member companies employing 10–49 people in 24 Member States. Thirteen organisations from seven Member States represent self-employed workers in the sector, while more than three quarters of the organisations are equally representative of very small and large companies in the sector.

Data on, or estimations of, membership strength and trends are available for 30 of the 48 employer organisations, with 15 of those 30 reporting a stable membership in the past 2 to 3 years, 5 reporting increases (1 in France, 1 in Spain and all 3 Polish employer organisations) and 10 reporting decreasing membership (Table 25).

Table 23: Scope of membership domains of sectoral employer organisations, 2023

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services (typesetting and electronic make-up)	Binding of printed material	Other printing	Other commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Number of employer organisations active in each sector	32	32	33	31	33	32	30	30	17	23	23	24	18	25	10	7	19
Number of employer organisations not active in each sector	2	2	2	2	2	4	5	3	3	3	3	3	4	4	3	5	4
Number of Member States with at least one employer organisation	22 + IE	24 + IE	22 + IE	23 + IE	22 + IE	24 + IE	22 + IE	23 + IE	14 + IE	18 + IE	21 + IE	21 + IE	16 + IE	20 + IE	9 + IE	6 + IE	16 + IE

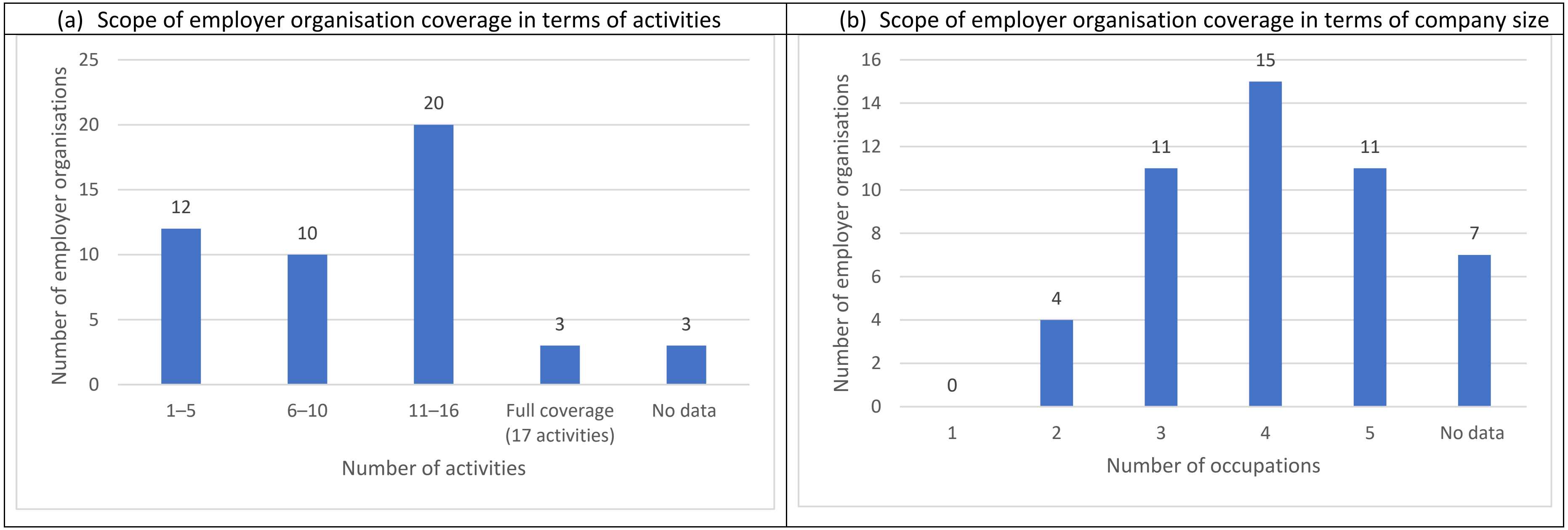
	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services (typesetting and electronic make-up)	Binding of printed material	Other printing	Other commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Member States in which there is no employer organisation covering this activity	FR (*), PL, SI, **EL**	SI, **EL**	AT, FI, SI, **EL**	HR, SI, **EL**	CY (*), HR, SI, **EL**	SI, **EL**	BG (*), EE, IT, **EL**	IT, PL, **EL**	AT (*), CY, EE (*), FI, FR (*), HR, IT, LU, MT, PL (*), SK, **EL**	AT (*), CY (*), ES, FI, HR, IT, SK (*), **EL**	CY (*), CZ, IT, **EL**	CY, FI, HR, IT, **EL**	BG (*), CY (*), DK (*), EE, FR (*), HR, LV, SI (*), SK (*), **EL**	CY, DK (*), HR, SI (*), SK, **EL**	AT (*), BE, CY (*), CZ (*), DK (*), EE, FI, HR, HU (*), LU, LV, NL (*), PL, RO (*), SI (*), SK (*), **EL**	AT (*), BE, BG (*), CY (*), CZ, DE, DK (*), EE, FI, FR (*), HR, HU (*), IT, LU, NL (*), PL, RO, SI, SK (*), **EL**	BE, DE, EE (*), HR, LU, NL (*), RO, SI (*), SK (*), **EL**

(*) Member States in which the activity in question is not considered part of the graphical sector. A complete list of the activities that are considered part of the graphical sector in each Member State is available in Table 54 in the Annex.

Notes: No data are available on the sector coverage of the Irish Printing Federation. Bold font is used for Greece, as no employer organisation was identified as active in the sector.

Source: Network of Eurofound Correspondents, 2023.

Figure 11: Activities and occupations covered by the employer organisations, 2023



Note: No data on the sector coverage and size of company members are available for the Irish Printing Federation.

Source: Network of Eurofound Correspondents, 2023.

Table 24: Employer organisation coverage by company size, geographical coverage and additional sectors of activity

<table>
<tr><th>Criterion</th><th>Classification</th><th>Number of employer organisations</th><th>Number of MSs in which the employer organisations in the previous column are located</th><th>Number of employer organisations for which information is available</th></tr>
<tr><td rowspan="5">Company size (42) ([21])</td><td>Self-employed</td><td>13</td><td>7</td><td rowspan="5">42 employer organisations located in 24 MSs. (The following MS have missing information for all organisations: IE and IT. There is no employer organisation in EL.)</td></tr>
<tr><td>1–9 employees</td><td>34</td><td>19</td></tr>
<tr><td>10–49 employees</td><td>42</td><td>24</td></tr>
<tr><td>50–249 employees</td><td>37</td><td>23</td></tr>
<tr><td>250+ employees</td><td>31</td><td>19</td></tr>
<tr><td rowspan="2">Geographical coverage</td><td>Entire Member State (43) (*)</td><td>42</td><td>25</td><td>43 employer organisations located in 24 MSs. (The following MSs have missing information for employer organisations: ES, IE, IT and PL. There is no employer organisation in EL.)</td></tr>
<tr><td>Regional substructure (37) ([22])</td><td>12</td><td>23</td><td>37 employer organisations located in 23 MSs. (The following MS have missing information for all employer organisations: IE, IT and SE. There is no employer organisation in EL.)</td></tr>
<tr><td rowspan="3">Company size with largest % of members (28) ([23])</td><td>250+ employees</td><td>7</td><td rowspan="3">28</td><td rowspan="3">28 employer organisations located in 20 MSs (The following MSs have missing information for all employer organisations: DE, IE, IT, LV, LU and PT. The following MSs have missing information for some employer organisations: AT, BE, ES, NL and PL. There is no employer organisation in EL.)</td></tr>
<tr><td>10–249</td><td>20</td></tr>
<tr><td>0–9</td><td>6</td></tr>
<tr><td rowspan="6">Other sectors in which employer organisations have members (32)</td><td>Paper</td><td>14</td><td>12 (*)</td><td rowspan="6">All 32 employer organisations located in 14 MSs.</td></tr>
<tr><td>Audiovisual</td><td>8</td><td>6 (*)</td></tr>
<tr><td>Commerce</td><td>7</td><td>6 (*)</td></tr>
<tr><td>Logistics</td><td>7</td><td>6 (*)</td></tr>
<tr><td>Transport</td><td>7</td><td>6 (*)</td></tr>
<tr><td>Postal and courier</td><td>6</td><td>5 (*)</td></tr>
</table>

([21]) The five employer organisations for which information is missing are in Italy (3 out of 3) and Poland (2 out of 5).

([22]) The 10 employer organisations for which information is missing are in Italy (3 out of 3), Poland (3 out of 5), Spain (2 out of 5) and Sweden (2 out of 2).

([23]) The 19 employer organisations for which information is missing are in Austria (3 out of 5), Belgium (1 out of 2), Germany (1 out of 1), Italy (3 out of 3), Latvia (1 out of 1), Luxembourg (1 out of 1), the Netherlands (1 out of 2), Poland (3 out of 5), Portugal (1 out of 1) and Spain (4 out of 5).

Criterion	Classification	Number of employer organisations	Number of MSs in which the employer organisations in the previous column are located	Number of employer organisations for which information is available
	Graphic design advertising	17	14 (*)	
	Photographers	7	7 (*)	
	Production of signage and luminous signs	10	9 (*)	
	Video game production	4	4 (*)	
	Production of packaging (including corrugated)	13	13 (*)	
	Production of other packaging	10	10 (*)	

(*) There are no data for five Member States (Cyprus, Czechia, Germany, Ireland and Latvia).

Notes: MS, Member State. The categories within each group are not mutually exclusive. The number in brackets in the 'Criterion' column is the number of trade unions for which this information is not missing.

Source: Network of Eurofound Correspondents, 2023.

Table 25: Membership strength of national employer organisations in the graphical sector

MS	Employer organisation	Number of member companies in the graphical sector	Sectoral workforce of members	Trend in membership in the last two or three years	Rank of employer organisation at the national level (24)
AT	VZÖ	~ 50	n/a	n/a	3
	Propak	Only a few	n/a	n/a	3
	BIK	9 315	Very small (only artisan bookbinders)	n/a	3
	VDMT	200, including companies outside the graphical sector	50 %, including the workforce of members outside the graphical sector	Stable	2
	FVD	1 296 (25)	> 6 000	Decreased	1
BE	Febelgra	Between 250 and 330	n/a	n/a	n/a
	BNM	8	n/a	n/a	2
BG	UPIB (business association)	92	10 %	Stable	1
CY	CMPA	10	~ 150	Decreased	1
CZ	SPP	39	1 500	Stable	1
DE	bvdm				1
DK	Grakom	130	1 522 blue collar 2 585 white collar	Decreased	1
	DMA	15–20	n/a	Decreased	2
EE	ETPL (business association)	30	1 060	Stable	1
ES	Feigraf	3 000	35 000	Slightly decreased	1

(24) 1, largest employer organisation; 2, second-largest employer organisation; 3, neither the first nor the second-largest employer organisation.
(25) This is the number of active business licences.

MS	Employer organisation	Number of member companies in the graphical sector	Sectoral workforce of members	Trend in membership in the last two or three years	Rank of employer organisation at the national level ([24])
	AFCO	200	n/a	n/a	2
	AME	30	n/a	n/a	n/a
	ADEGI	1 051	60 005 in total (cross-sectoral)	n/a	n/a
	FGEE	788 ([26])	12 760	Increased	n/a ([27])
FI	Medialiitto	50	60–65 % (employer organisation estimate)	Stable	1
	GT (business association)	125	75–80 %	Decreased	2
FR	GMI	217	3 686 (2021)	n/a	2
	UNIIC	624	About 16 000	Increased	1
HR	HUP – UGN	10	15–20 %	Stable	1
HU	Fedprint	68	9 950	Stable	1
IE	Irish Printing Federation	n/a	n/a	n/a	1
IT	Assografici	627	38 452	n/a	n/a
	AIE	300	n/a	n/a	n/a
	ANES	150	n/a	n/a	n/a
LT	LISPA	16	2 000 (including printing)	Stable	1
LU	AMIL	26	n/a	n/a	1
LV	LPUA	28	n/a	Stable	1
MT	MEA	30	An estimate of around 1 450 people	Stable	n/a

([26]) These are editors and companies in editorial production.
([27]) This employer organisation is the only one regarding editorial activity.

MS	Employer organisation	Number of member companies in the graphical sector	Sectoral workforce of members	Trend in membership in the last two or three years	Rank of employer organisation at the national level (24)
	SME Chamber	32	n/a	Stable	3
NL	KVGO	552	10 131	Decreased	1
	Vereniging Repro Nederland	18	240	Stable	n/a
PL	Flekso (business association)	~ 100	n/a	Increased	n/a
	PIO (business association)	~ 80	n/a	Increased	n/a
	PASDP (business association)	~ 80	> 1 000	Increased	n/a
	Polish Chamber of Printing (business association)	n/a	n/a	n/a	n/a
	Polish Papermakers Association	n/a	n/a	n/a	n/a
PT	Apigraf	283	Approximately 6 400	Stable	1
RO	ATT (business association)	58	2 200	Decreased	1
SE	GF	350	10 000 employees	Slightly decreased	1
	Almega	600	36 000 employees (including non-graphical workers)	Decreased	2
SI	GZS-MZ	10 % of small and medium-sized companies	5 %	Stable	1
	ZDS	At least 10 % of all companies	10 %	Stable	n/a
SK	ZPnS.sk	30	1 200	n/a	1

Note: MS, Member State; n/a, data not available. Entries shaded in blue are members of Intergraf.

Source: Network of Eurofound Correspondents, 2023.

2.4. Involvement of national employer organisations in collective bargaining

For 44 of the 48 employer organisations, data on involvement in MEB at the sector level are available (see Table 27). This information is summarised in Table 26. Of these 44 employer organisations, 27 (61.36 %) in 14 Member States are involved in collective bargaining negotiations at the sector level. The 11 Member States in which no sectoral bargaining was reported are Greece (which has no employer organisation) and Bulgaria, Croatia, Czechia, Estonia, Latvia, Lithuania, Malta, Poland, Romania and Slovakia. There is information for 39 of the 48 employer organisations on whether they support their members in SEB at the enterprise level. Only three employer organisations (one in Germany, one in Hungary and one of the two in Malta) report involvement in SEB. While the employer organisation in Germany is involved in both SEB and MEB, the organisations in Hungary and Malta support their members only in company-level bargaining.

Table 26: Overview of graphical employer organisations' involvement in collective bargaining in the EU-27, 2023

Involvement in collective bargaining	Member States [28]	Number of employer organisations
Employer organisations involved in collective bargaining (MEB)	14 (AT, BE, CY, DE, DK, ES, FI, FR, IT, LU, NL, PT, SE, SI)	27
Employer organisations not involved in collective bargaining (MEB)	10 (BG, CZ, EE, HR, LT, LV, MT, PL, RO, SK)	15
Employer organisations supporting their members in SEB only	3 (DE, HU, MT)	3
No data on employer organisations' involvement in collective bargaining	3 (ES, IE, PL)	4
Total		**48**

Note: Greece does not appear in this table, as it does not have an employer organisation.

Source: Network of Eurofound Correspondents, 2023.

Of the 26 Member States with an employer organisation, in 16, at least one employer organisation is involved in collective bargaining, either MEB (sectoral bargaining) or SEB. Of the remaining nine Member States in which no collective bargaining takes place, in five (Croatia, Czechia, Latvia, Lithuania and Slovakia) there is an employer organisation but it is not involved in collective bargaining. In the remaining four Member States (Bulgaria, Estonia, Poland and Romania), there is only a business association, which explains the absence of bargaining. No data on involvement in collective bargaining or the role in the national industrial relations landscape were provided for the Irish Printing Federation, which declined to participate in this study.

Table 27 also presents information on whether the employer organisations are involved in social dialogue, are consulted by the government and are affiliated with a national confederation. Governments in 20 Member States consult 27 organisations on sector matters. Bipartite dialogue takes place in nine Member States (Belgium, Czechia, Finland, France, Hungary, the Netherlands,

([28]) As not all employer organisations in a Member State follow the same type of bargaining, the sum of the number of Member States exceeds 27.

Romania, Spain and Sweden) involving 12 organisations. In four Member States (Denmark, Finland, Slovakia and Spain), tripartite dialogue involves six organisations. Twenty-nine organisations are part of a confederation at the national level.

Table 27: List of graphical employer organisations' role in national industrial relations' landscape

MS	Employer organisation	Basis of representativeness	% of sectoral workforce covered by collective bargaining	Involved in collective bargaining?		Involved in bipartite social dialogue?	Involved in tripartite social dialogue?	Consulted by the government?	Affiliated with a national confederation and, if so, which one(s)?
				MEB	SEB				
Number of organisations				**27**	**3**	**12**	**6**	**27**	**29**
Number of MSs				**14**	**3**	**9**	**4**	**20**	**22**
AT	VZÖ	MR	10	Yes	No	No	No	No	No
	Propak	MR	< 5	Yes	No	No	No	n/a	WKO
	BIK	MR	< 5	Yes	No	No	No	n/a	WKO
	VDMT	Not representative (29)	0	No	No	No	No	Yes	No
	FVD	n/a	n/a (30)	No	No	n/a	n/a	No	WKO
BE	Febelgra	LR	96–100	Yes	No	Yes	No	Yes	VBO
	BNM	LR	96–100	Yes	No	Yes	No	Yes	No
BG	UPIB (business association)	LR	0	No	No	No	No	Yes	KRIB
CY	CMPA	MR	~ 17	Yes	No	No	No	Yes	OEB
CZ	SPP	MR	10	No	No	Yes	No	Yes	UZS ČR
DE	bvdm	MR	n/a	Yes	Yes	No	No	Yes	BDA and UDH
DK	Grakom	MR	80–85 (estimate)	Yes	No	No	Yes	Yes	DA
	DMA	MR	< 30	Yes	No	No	Yes	Yes	DA
EE	ETPL (business association)		0	No	No	No	No	Yes	n/a
ES	Feigraf	LR	100	Yes	n/a	No	Yes	Yes	No
	AFCO	LR	99	Yes	n/a	No	No	n/a	n/a

(29) VDMT used to be considered representative (until 2016) and was involved in collective bargaining, but has not been involved since.

(30) For many years, VDMT had the right to conclude collective agreements for the graphical sector (see above), as the Austrian Labour Constitution gives voluntary associations the right to conclude collective agreements over mandatory associations. However, the VDMT withdrew its collective bargaining capacity in 2017 and thus caused the 'printers' collective agreement' to expire. Following this, the collective bargaining capacity for printers was reverted to the FVD. However, no new collective agreement has been concluded since.

MS	Employer organisation	Basis of representativeness	% of sectoral workforce covered by collective bargaining	Involved in collective bargaining?		Involved in bipartite social dialogue?	Involved in tripartite social dialogue?	Consulted by the government?	Affiliated with a national confederation and, if so, which one(s)?
				MEB	SEB				
	AME	LR	n/a [31]	Yes	No	No	No	n/a	Confemetal
	ADEGI	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	FGEE	LR	n/a [32]	Yes	No	Yes	Yes	Yes	No
FI	Medialiitto	MR	65	Yes	No	Yes	Yes	Yes	EK
FI	GT (business association)	MR	0	No	No	No	No	No	via Finnmedia
FR	GMI	LR	100	Yes	No	Yes	No	Yes	CPME
FR	UNIIC	LR	100	Yes	No	Yes	No	Yes	MEDEF, CPME, U2P
HR	HUP – UGN	LR	30–35	No	No	No	No	Yes	CEA
HU	Fedprint	LR	15	No	Yes	Yes	No	No	MGYOSZ
IE	Irish Printing Federation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	IBEC
IT	Assografici	MR	~ 100	Yes	n/a	n/a	n/a	n/a	Confindustria
IT	AIE	MR	~ 100	Yes	n/a	n/a	n/a	n/a	Confindustria
IT	ANES	MR	~ 100	Yes	n/a	n/a	n/a	n/a	No
LT	LISPA	MR	0	No	No	No	No	Yes	LPK
LU	AMIL	MR	n/a	Yes	No	No	No	n/a	FDA
LV	LPUA	Both	0	No	No	No	No	Yes	LDDK
MT	MEA	LR	70	No	Yes	No	No	Yes	No
MT	SME Chamber	n/a	n/a	No	No	No	No	Yes	No
NL	KVGO	Both	50 (estimate)	Yes	No	Yes	No	Yes	VNO-NCW and AWVN
NL	Vereniging Repro Nederland	Both	< 1 (estimate)	Yes	No	Yes	No	No	No
PL	Flekso (business association)	Not representative	0	No	No	No	No	Yes	No
PL	PIO (business association)	Not representative	0	No	No	No	No	Yes	No
PL	PASDP (business association)	Not representative	0	No	No	No	No	No	No

(31) 100 % of the metallographic sector.
(32) 100 % of the editing sector.

MS	Employer organisation	Basis of representativeness	% of sectoral workforce covered by collective bargaining	Involved in collective bargaining?		Involved in bipartite social dialogue?	Involved in tripartite social dialogue?	Consulted by the government?	Affiliated with a national confederation and, if so, which one(s)?
				MEB	SEB				
	Polish Chamber of Printing (business association)	n/a	0	n/a	n/a	n/a	n/a	n/a	n/a
	Polish Papermakers Association	n/a	0	n/a	n/a	n/a	n/a	n/a	n/a
PT	Apigraf	MR	~ 58–100 (33)	Yes	No	No	No	Yes	CIP
RO	ATT (business association)	Not representative	0	No	No	Yes	No	No	FIGPA
SE	GF	MR	80–90	Yes	No	Yes	No	Yes	Svenskt Näringsliv
	Almega	MR		Yes	No	No	No	Yes	Svenskt Näringsliv
SI	GZS-MZ	LR	50	Yes	No	No	No	No	GZS
	ZDS	MR	50	Yes	No	No	No	No	No
SK	ZPnS.sk	MR	9	No	No	No	Yes	Yes	No

Notes: MS, Member State; LRs, legal requirement base on national legislation; MR, mutual recognition from employer organisations; n/a, data not available.

Source: Network of Eurofound Correspondents, 2023.

(33) The Eurofound correspondent indicated 58 %, during the review of the preliminary findings, but Intergraf corrected the share to 100 % based on the legal extension of the collective bargaining agreements.

2.5. National collective bargaining and social dialogue patterns

This section summarises the extent of collective bargaining, the type of collective bargaining and the involvement of national trade unions and employer organisations in collective bargaining in all of the Member States (Table 28). No collective bargaining takes place in four Member States (Bulgaria, Estonia, Greece and Lithuania). In the remaining 23 Member States, 17 unions and 26 employer organisations engage only in MEB, 14 unions and three employer organisations (in Germany, Hungary and Malta) engage only in SEB and 20 unions and one employer organisation (in Germany) engage in both SEB and MEB. Two trade unions and 10 employer organisations do not bargain. No data are available for the Irish Printing Federation.

Table 28: Collective bargaining in the graphical sector by involvement of social partner organisations, 2023

Type of collective bargaining	Number of trade unions	Number of employer organisations
No collective bargaining	2	10
Only SEB	13	3
Only MEB	17	27([34])
SEB and MEB	22	1
Missing information on whether SEB or MEB	5	4

Source: Network of Eurofound Correspondents, 2023.

Looking at the situation in each Member State, in 11 Member States, both SEB and MEB take place in the graphical sector. Table 29 presents aggregate data on collective bargaining coverage at the national level by type of bargaining. As expected, collective bargaining coverage is highest in Member States with both SEB and MEB, whereas, in Member States with only SEB, collective bargaining coverage is lower.

Table 29: Type of collective bargaining in the graphical sector by Member State, 2023

Type of collective bargaining	Member States
No collective bargaining	BG, EE, EL, LT
Only SEB	CZ, HR, HU, IE, LV, MT, PL, RO, SK
Only MEB	AT, CY, FI
SEB and MEB	BE, DE, DK, ES, FR, IT, LU, PT, NL, SE, SI

Source: Network of Eurofound Correspondents, 2023.

The collective bargaining coverage in Belgium, Denmark, France, Italy, Spain and Sweden is higher than 80 %, given that sectoral agreements exist in all of these Member States (Table 30). More than half of the graphical workforce is also covered by collective agreements in Finland, Malta, Portugal and Slovenia. In Austria, Croatia, Cyprus, Czechia, Hungary and Ireland, between 10 % and 49 % of the people working in the graphical sector are covered, while, in Romania and Slovakia, less than 10 % are

([34]) This includes Portugal, even though since 2009 no MEB has taken place.

covered. There are no clear data on the share of the workforce covered by collective bargaining for Germany, Luxembourg, the Netherlands or Poland.

Table 30: Coverage of collective bargaining in the graphical sector by Member State, 2023

Type of collective bargaining	Collective bargaining coverage						Coverage % not available
	> 90 %	80–90 %	50–79 %	10–49 %	< 10 %	0 %	
No collective bargaining						BG, EE, EL, LT	
Only SEB			MT	CZ, HR, HU, IE	RO, SK	LV	PL
Only MEB			FI	AT, CY			
SEB and MEB	BE, ES, FR, IT	DK, SE	PT, SI				DE, LU, NL

Note: In Latvia, one of the unions engages in SEB, while the other union is not recognised as representative for collective bargaining and does not bargain and therefore is classified, together with Greece, as having no collective bargaining.

Source: Network of Eurofound Correspondents, 2023.

2.6. Participation in sectoral policies and national sectoral social dialogue

Table 31 summarises the information presented in Table 22 and Table 27 on whether trade unions and employer organisations are consulted on sector-related issues by the government. Governments appear to consult mostly employer organisations rather than unions. In nine Member States, the government consults both employer organisations and trade unions on sector-related matters, while, in three Member States (Hungary, Romania and Slovenia), no employer organisations or trade unions are consulted. Finally, for two Member States (Italy and Luxembourg), there is no information on whether an employer organisation is consulted and, in another two (the Netherlands and Slovakia), there is no information on whether a trade union is consulted.

Table 31: Consultation of employer organisations and trade unions by Member State, 2023

	Trade unions consulted	No trade union consulted	No data on trade union consultation	No sectoral trade unions
Employer organisations consulted	**9 MSs:** BE, DE, DK, FI, FR, LV, MT, PL, SE	**6 MSs:** AT, CY, CZ, ES, HR, PT	**2 MSs:** NL, SK	**3 MSs:** BG, EE, LT
No employer organisation consulted		**3 MSs:** HU, RO, SI		
No data on employer organisation consultation	**1 MS:** IT	**1 MS:** LU	**1 MS:** IE	
No employer organisations		**1 MS:** EL		

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

Table 32 presents the tripartite and/or bipartite permanent social dialogue bodies dealing with graphical sector-related issues. Such bodies exist in only nine Member States, and there are tripartite bodies in only four (Denmark, Finland, Ireland and Spain). The main areas of activity are consultation on negotiations, health and safety, and training. In most instances, these bodies were established following an agreement and are not statutory.

Table 32: Social dialogue bodies in the graphical sector: features and activities, 2023

MS	Is there a social dialogue permanent body and, if so, what is its name?	Is there bipartite or tripartite social dialogue?	Domain(s) of activity	Origin: agreement or statutory	Participating trade union(s)	Participating employer organisation(s)
AT	No	No	None	None	None	None
BE	JC130 and JC200	Bipartite	Joint committee on sector-related matters	Agreement	ACV-CSC BIE, ACLVB-CGSLB, ABVV-FGTB BBTK SETCa and ACV-CSC CNE	Febelgra and BNM
BG	No	No	None	None	None	None
CY	No	No	None	None	None	None
CZ	No	No	None	None	None	None
DE	No	No	None	None	None	None
DK	BrancheFællesskaber for Arbejdsmiljø – Industri (BFA-I)	Tripartite	Working environment	Statutory	Dansk Metal, 3F Industri, HK Privat, Dansk El-Forbund, Fødevareforbundet NNF, Teknisk Landsforbund and CO-industri	DI (Dansk Industri), Grakom, DMA, Dansk Mode og Textil and Lederne
	Grafisk Uddannelsesudvalg	Tripartite	Vocational training	Statutory	HK Privat	Grakom, The Danish Chamber of Commerce and DMA
EE	No	No	None	None	None	None
EL	No	No	None	None	None	None
ES	Fundae	Tripartite	Employee training for the graphical sector	No information available	UGT and CCOO	Feigraf, AFCO and FGEE
FI	Työterveyskeskus TTK	Tripartite	Occupational safety	Statutory	Teollisuusliitto, PRO and SJL	Medialiitto
	Mediatyö2030-project	Bipartite	Training/education	Agreement	Teollisuusliitto, PRO and SJL	Medialiitto
FR	Commission paritaire permanente de négociation et d’interprétation des imprimeries de labeur (CPPNI)	Bipartite	Collective agreements’ interpretation	Both	Filpac CGT, F3C-CFDT, FC-CFTC, Fédération FO Livre and IP-CFE-CGC	UNIC and GMI
	Commission paritaire nationale de l’emploi et de la formation professionnelle	Bipartite	Vocational training	Agreement	Filpac CGT, F3C CFDT, FC-CFTC, Fédération FO Livre and IP CFE-CGC	UNIC and GMI

MS	Is there a social dialogue permanent body and, if so, what is its name?	Is there bipartite or tripartite social dialogue?	Domain(s) of activity	Origin: agreement or statutory	Participating trade union(s)	Participating employer organisation(s)
HR	Social council for graphic sector	Bipartite	Wages, working conditions, health and security issues	Agreement	SGIM	No data
HU	Nyomdaipari Ágazati Párbeszéd Bizottság	Bipartite	Printing	Agreement	NYDSZ	Fedprint
IE	Print and Packaging Forum	Tripartite	Printing and packaging	Agreement	Irish Print Group (part of SIPTU)	Irish Printing Federation (Ibec)
IT	No	No	None	None	None	None
LT	No	No	None	None	None	None
LU	No	No	None	None	None	None
LV	No	No	None	None	None	None
MT	No	No	None	None	None	None
NL	Council for Consultation in the Graphic Media Industry (ROGB)	Bipartite	Consultation on collective agreements	Agreement	FNV Media en Cultuur, CNV and De Unie	KVGO
PL	No	No	None	None	None	None
PT	No	No	None	None	None	None
RO	No	No	None	None	None	None
SE	No	No	None	None	None	None
SI	No	No	None	None	None	None
SK	No	No	None	None	None	None

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

2.7. Fragmentation and pluralism

This section provides an overview of the reasons for organisational fragmentation and pluralism in the graphical sector, and this is summarised for trade unions in Table 33. In some Member States, trade unions and employer organisations cover different parts of the sector, thus making bargaining between the two parts more difficult. In other Member States, however, trade unions and employer organisations represent the same parts of the sector, so there is an overlap in the membership domain. In the graphical sector, there is an average of 2.5 trade unions per Member State. In 10 Member States, there is a single trade union. In the 14 Member States with more than one trade union, the explanation for the fragmentation reported in most instances is that each union organises different types of workers. The second most mentioned reason is that trade unions have similar membership domains but differ in terms of ideology.

Table 33: Reasons for fragmentation and pluralism of trade unions in the graphical sector, 2023

MS	Organise different types of workers (blue/white collar, management and/or self-employed)	Organise workers in different parts of the Member State	Organise members in different parts of the sector	Similar membership domains, but differ in terms of ideology	Other reasons
AT	A single trade union for the sector				
BE			X	X	
CY				X	
CZ	A single trade union for the sector				
DE	A single trade union for the sector				
DK	X				
EL	A single trade union for the sector				
ES		X			
FI	X				
FR	X			X	
HR	A single trade union for the sector				
HU	A single trade union for the sector				
IE	X		X		
IT				X	
LU				X	
LV	The two trade unions cooperate, and it is almost as if no fragmentation exists				
MT	A single trade union for the sector				
NL	X		X		
PL	A single trade union for the sector				
PT	X		X	X	
RO	A single trade union for the sector				
SE	X		X		

MS	Organise different types of workers (blue/white collar, management and/or self-employed)	Organise workers in different parts of the Member State	Organise members in different parts of the sector	Similar membership domains, but differ in terms of ideology	Other reasons
SI					X
SK	A single trade union for the sector				
Total	**7**	**1**	**5**	**6**	**1**

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

In terms of employer organisations, in the graphical sector, the average is 1.8 employer organisations per Member State. In 13 Member States, there is a single employer organisation or business association in the graphical sector. The reasons for the fragmentation and pluralism of employer organisations in the graphical sector are presented in

Table 34. The most reported reason for the fragmentation is that each union organises different parts of the graphical sector. The second most reported reason is that employer organisations organise different types of companies. Only in Italy are ideological differences brought up as an explanation of employer organisation fragmentation.

Table 34: Reasons for fragmentation and pluralism of employer organisations in the graphical sector, 2023

MS	Organise different types of companies (microcompanies, small and medium-sized companies, large companies)	Organise companies in different parts of the graphical sector	Some organisations represent the employers in collective bargaining matters and other organisations (business associations) represent the trade and business interests of the same employers	Similar membership domains, but differ ideologically	Other reasons
AT	X	X	X		X (35)
BE		X			
BG	A single business association for the sector				
CY (36)		X			
CZ	A single employer organisation for the sector				
DE	A single employer organisation for the sector				
DK		X			
EE	A single business association for the sector				
ES		X			
FI			X		X (37)
FR	X				
HR	A single employer organisation for the sector				
HU	A single employer organisation for the sector				
IE	A single employer organisation for the sector				
IT				X	
LT	A single business association for the sector				
LU	A single employer organisation for the sector				
LV	A single employer organisation for the sector				
MT	X				
NL	X	X			
PL		X			
PT	A single employer organisation for the sector				
RO	A single employer organisation for the sector				
SE	X				
SI		X			
SK	A single employer organisation for the sector				
Total	**5**	**8**	**2**	**1**	**2**

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

(35) There is fragmentation in terms of the types of employer organisation membership (voluntary versus mandatory) and in terms of small-scale trade / artisan companies in bookbinding versus industrial bookbinding (which is considered to be part of the paper processing industry in Austria).

(36) In Cyprus, the rest of the tables refer to only a single employer organisation, as information was provided for only one of the two employer organisations. There is also a business association active in the sector.

(37) There is fragmentation due to the implementation of different collective agreements.

3. European level of representation

As indicated in Section 0.2, UNI Europa Graphical and Packaging is the European organisation representing graphical sector workers, while Intergraf represents the employers in this sector. This chapter provides a closer look at the European representation of the national-level organisations identified in this study. Sections 3.1 and 3.4 detail the situation and role of the trade unions and employer organisations affiliated with the representative European social partner organisations and thus participating in the graphical ESSDC. Sections 3.2 and 3.5 present the features of national trade unions and employer organisations not represented in the ESSDC. Sections 3.3 and 3.6 list the European organisations that have some representativeness in the graphical sector. Section 3.8 describes the mandating and decision-making capacities of the two representative European social partner organisations participating in the graphical ESSDC, while Section 3.9 looks at the effective participation of the national members of these two organisations in the meetings of the graphical ESSDC over the past three years. Figure 12 gives an overview of the membership of the 35 trade unions affiliated with UNI Europa Graphical and Packaging and the 17 employer organisations affiliated with Intergraf.

Figure 12: Number of graphical trade unions and employer organisations affiliated with UNI Europa Graphical and Packaging and Intergraf, respectively, 2023

Number of trade unions affiliated with UNI Europa	MS	Number of employer organisations affiliated with Intergraf
1 (1)	AT	(5) 1
4 (5)	BE	(2) 1
0 (0)	BG	**(1) 1**
1 (2)	CY	(1) 0
0 (1)	CZ	(1) 0
1 (1)	**DE**	**(1) 1**
2 (2)	DK	(2) 1
0 (0)	EE	**(1) 1**
0 (1)	EL	(0) 0
4 (8)	ES	(5) 0
2 (3)	FI	(2) 1
2 (5)	FR	(2) 1
1 (1)	HR	(1) 0
1 (1)	**HU**	**(1) 1**
2 (2)	IE	(1) 0
3 (3)	IT	(3) 1
0 (0)	LT	**(1) 1**
2 (2)	**LU**	**(1) 1**
1 (2)	LV	**(1) 1**
0 (1)	MT	(2) 0

1 (3)	NL	(2) 1
1 (1)	PL	(5) 0
2 (4)	PT	**(1) 1**
0 (1)	RO	**(1) 1**
3 (6)	SE	(2) 1
1 (2)	SI	(2) 0
0 (1)	SK	(1) 0
35 (59)	EU-27	(48) 17

Notes: MS, Member State. The numbers in brackets indicate the number of all of the national sectoral trade unions / employer organisations identified. Bold font indicates the Member States in which all of the sectoral trade unions / employer organisations are affiliated with UNI Europa Graphical and Packaging / Intergraf, respectively.

Source: Network of Eurofound Correspondents, 2023.

Table 35 lists all of the national trade unions identified in this study, detailing their affiliations with the representative European social partner, UNI Europa Graphical and Packaging, and with any other European organisations.

Table 35: Trade unions' affiliation with European organisations for their graphical sector members, 2023

MS	Trade union	Affiliated with UNI Europa Graphical and Packaging and involved in management bodies / working groups?	Affiliated with other European organisations for the graphical sector and, if so, which one(s)? (38)
AT	GPA	Yes, affiliated and involved in working groups. Not involved in management bodies	industriAll Europe (39)
BE	ACV-CSC CNE	No	industriAll Europe
	ACV-CSC BIE	Yes, both	industriAll Europe
	ABVV-FGTB BBTK-SETCa	Yes, both	industriAll Europe, ETF, EFFAT and EPSU
	ACLVB-CGSLB	Yes, affiliated. No data on involvement in management bodies or working groups	No
	ACV-CSC Puls	Yes, affiliated. No data on involvement in management bodies or working groups	industriAll Europe
CY	ΣΕΒΕΤΤΥΚ	No	No
	OBIEK-SEK	Yes, affiliated. No data on involvement in management bodies or working groups	industriAll Europe
CZ	TB	No	No
DE	Ver.di	Yes, both	No
DK	HK Privat	Yes, both	ICTS
	3F	Yes, both	No
EL	OMTBX	No	No
ES	FSC-CCOO	Yes, both	No
	ELA – Industria eta Eraikuntza	Yes, both	industriAll Europe

(38) As indicated by the trade union during the data collection stage.
(39) The affiliation with industriAll Europe for the graphical members was questioned by UNI Europa Graphical and Packaging during the review of the preliminary findings.

MS	Trade union	Affiliated with UNI Europa Graphical and Packaging and involved in management bodies / working groups?	Affiliated with other European organisations for the graphical sector and, if so, which one(s)? (38)
	UGT-FICA	Yes, affiliated. No data on involvement in management bodies or working groups	No information
	UGT-FeSMC (40)	Yes, affiliated	No information
	UGT-SP	Not affiliated, according to UNI Europa Graphical and Packaging	No information
	LAB	No	No
	FI-USO	No	No
	CCOO-Industria	No	No
FI	Teollisuusliitto	Yes, both	No
	PRO	Yes, affiliated. Not involved in management bodies or working groups	No
	SJL	No	No
FR	Filpac CGT	Yes, affiliated and involved in both	industriAll Europe
	Fédération FO Livre	No	No
	F3C-CFDT	Yes, affiliated. Not yet involved in management bodies or working groups	No
	FC-CFTC	No	No
	IP-CFE-CGC	No	No
HR	SGIM	Yes, both	No
HU	NYDSZ	Yes, both	No information
IE	SIPTU	Yes, affiliated. No data on involvement in management bodies or working groups	No
	Unite	Yes, affiliated (41) and involved in both	No
IT	SLC-CGIL	Yes, both	industriAll Europe (42) indirectly via the CGIL confederation
	Fistel-CISL	Yes, affiliated. Involved in working groups and in management bodies as a substitute	No
	Uilcom-UIL	Yes, affiliated. No data on involvement in management bodies or working groups	No
LU	LCGB-Services	Yes, affiliated. Involved in management bodies but not involved in working groups	industriAll Europe
	OGB-L – imprimerie, médias, culture, FLTL	Yes, affiliated. Involved in management bodies but not involved in working groups	industriAll Europe
LV	LKDAF	Yes, affiliated. Not involved in management bodies or working groups	No
	LPNA	No	No
MT	GWU	No	industriAll Europe
NL	FNV Media en Cultuur	Yes, affiliated. No data on involvement in management bodies or working groups	No information
	De Unie	No	No information
	CNV	No information	No information

(40) UGT-FeSMC was not reported to be a member of UNI Europa Graphical and Packaging by the Eurofound correspondent; however, this was later reported during the data quality checks by UNI Europa Graphical and Packaging.
(41) Unite centralises its international participation in the UNI Europa bodies through its offices in London.
(42) The affiliation with industriAll Europe for the graphical members was questioned by UNI Europa Graphical and Packaging during the review of the preliminary findings.

MS	Trade union	Affiliated with UNI Europa Graphical and Packaging and involved in management bodies / working groups?	Affiliated with other European organisations for the graphical sector and, if so, which one(s)? (38)
PL	ZPP	Yes, affiliated. Involved in management bodies; no information on involvement in working groups	No
PT	Fiequimetal	No	No
	Sindetelco	Yes, affiliated. No data on involvement in management bodies; not involved in working groups	No
	Sinttav	Yes, affiliated and involved in working groups and management bodies	No
	SIMA	No	industriAll Europe
RO	USTR	No	No
SE	GS	Yes, affiliated. Involved in management bodies and working groups	NGU (43)
	Unionen	Yes, affiliated. Not involved in management bodies; no information on involvement in working groups	industriAll Europe
	Ledarna	No	No
	Pappers	No	No
	SI	Yes, declared members from 2024 onwards. Unclear whether members are active solely in graphical industry, or in graphical and packaging	No information
	SEKO	No	No
SI	SGDS	No	No
	Pergam	Yes, both	No
SK	SOZPP	No	No

Notes: MS, Member State. Blue-shaded cells indicate trade unions affiliated with UNI Europa Graphical and Packaging.

Source: Network of Eurofound Correspondents, 2023.

Table 36 lists all of the national employer organisations identified in this study, detailing their affiliation with the representative European social partner, Intergraf, and with any other European organisations.

Table 36: Affiliation of each employer organisation with Intergraf or other European organisations, 2023

MS	Employer organisation	Affiliated with Intergraf for the graphical sector?	Affiliated with another European organisation for the graphical sector and, if so, which one(s)?
AT	VZÖ	No	European Newspaper Publishers' Association (ENPA), EMMA and WAN-IFRA
	Propak	Yes, affiliated. No data on involvement in management bodies or working groups	No information

(43) The NGU (Nordic Graphical Union) is a supranational organisation covering Denmark (both HK Privat and 3F), Finland (Teollisuusliitto), Iceland, Norway and Sweden (GS). There is no competition between the NGU and UNI Europa Graphical and Packaging. The representatives of these unions in UNI Europa Graphical and Packaging governing bodies are appointed by the NGU as a joint representation of the Nordic countries.

MS	Employer organisation	Affiliated with Intergraf for the graphical sector?	Affiliated with another European organisation for the graphical sector and, if so, which one(s)?
	BIK	No	No information
	VDMT	No	No
	FVD	No	No information
BE	Febelgra	Yes, affiliated. No data on involvement in management bodies or working groups	FESPA
	BNM	No	FESPA and EMMA
BG	UPIB (business association)	Yes, both	No
CY	CMPA	No	No
CZ	SPP	No	No
DE	bvdm	Yes, affiliated. Involved in management bodies and working groups	FESPA
DK	Grakom	Yes, affiliated. Involved in management bodies and working groups	FESPA and European Graphic / Media Industry Network (EGIN)
	DMA	No	No
EE	ETPL	Yes, affiliated. Involved in management bodies and working groups	No information
ES	Feigraf	No	No
	AFCO	No	CEPI, CITPA, FEFCO, International Corrugated Case Association (ICCA), Fibre Box Association, Corrugated Packaging Alliance, Independent Packaging Association (AICC) and International Council of Forest & Paper Associations (ICFPA)
	AME	No	Metal Packaging Association
	ADEGI	No information	No information
	FGEE	No	FEP
FI	Medialiitto	No	WAN-IFRA
	GT (business association)	Yes, affiliated. Involved in management bodies and working groups	No
FR	GMI	No	No information
	UNIIC	Yes, affiliated. Involved in management bodies; no information on involvement in working groups	FINAT
HR	HUP – UGN	No	No
HU	Fedprint	Yes, affiliated. Involved in management bodies and working groups	CEPI
IE	Irish Printing Federation	No information	No information
IT	Assografici	Yes, affiliated. Involved in management bodies; no information on involvement in working groups	FEP, ECMA, CITPA, FEFCO, Eurosac, European Core and Tube Association (ECTA), FINAT and FTA Europe
	AIE	No information	International Publisher Association (IPA)
	ANES	No information	Federation of Periodical Press (FIPP) and International Federation of Audit Bureaux of Certification (IFABC)
LT	LISPA	Yes, affiliated. Not involved in management bodies or working groups	No
LU	AMIL	Yes, affiliated. No data on involvement in management bodies or working groups	No

MS	Employer organisation	Affiliated with Intergraf for the graphical sector?	Affiliated with another European organisation for the graphical sector and, if so, which one(s)?
LV	LPUA	Yes, affiliated. Involved in management bodies and working groups	ClimateCalc
MT	MEA	No	No
	SME Chamber	No	No
NL	KVGO	Yes, affiliated. Involved in management bodies and working groups	FESPA and (via Intergraf) WPCF
	Vereniging Repro Nederland	No	No
PL	Flekso (business association)	No	FTA Europe
	PIO (business association)	No	European Packaging Institutes Consortium (EPIC)
	PASDP (business association)	No	FESPA
	Polish Chamber of Printing (business association)	No	FESPA
	Polish Papermakers Association	No information	No information
PT	Apigraf	Yes, affiliated. Involved in management bodies and working groups	CITPA and FESPA
RO	ATT	Yes, affiliated. Not yet involved in management bodies or working groups at the date of data collection (newer member: joined in 2022)	FESPA through the Romanian Association of Serigraphy, Pad and Digital Printing (Arsitd)
SE	GF	Yes, affiliated. Involved in the steering committee	FESPA, WPCF through Intergraf, Grafkom, Nordic Printing Association (NOPA), FEFCO and ECMA
	Almega	No	No
SI	GZS-MZ	No	No
	ZDS	No	No
SK	ZPnS.sk	No	No

Notes: CEPI, Confederation of European Paper Industries; CITPA, International Confederation of Paper and Board Converters in Europe; ECMA, European Carton Makers Association; EMMA, European Magazine Media Association; FEFCO, European Federation of Corrugated Board Manufacturers; FEP, Federation of European Publishers; FESPA, Screen Printing, Digital Printing and Textiles Printing Association; FINAT, International Federation of Manufacturers and Converters of Self Adhesive and Heat Seal Materials on Paper and Substrate; FTA, Flexographic Technical Association; MS, Member State; WAN-IFRA, World Association of News Publishers; WPCF, World Print and Communication Forum. Blue-shaded cells indicate employer organisations affiliated with Intergraf.

Source: Network of Eurofound Correspondents, 2023.

3.1. Representativeness of UNI Europa Graphical and Packaging in the graphical sector

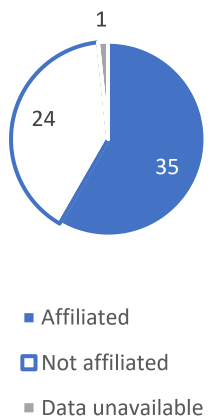
Of the 59 sectoral trade unions identified in Chapter 2, **35 are affiliated with UNI Europa Graphical and Packaging** (59 %) and 23 are not affiliated; for 1 union (CNV in the Netherlands), no clear data on affiliation were provided. Based on the available data, **the collective workforce of the 35 UNI Europa**

Graphical and Packaging affiliates constitutes around a quarter (26 %) ([44]) **of the total sectoral workforce** in the graphical sector (comprising printing activities and activities related to printing (NACE 18.1) and the reproduction of recorded media activities (NACE 18.2)).

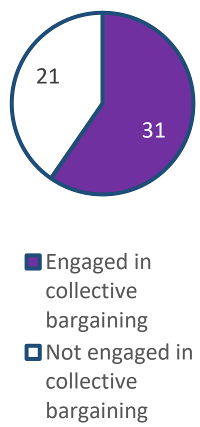
UNI Europa Graphical and Packaging has at least one affiliated sectoral trade union in 19 Member States. The five Member States with no affiliated sectoral trade union are Czechia, Greece, Malta, Romania and Slovakia. In three Member States (Bulgaria, Estonia and Lithuania), as mentioned in Chapter 2, no trade union was identified for the graphical sector. Of the 52 sectoral trade unions engaged in sector-related collective bargaining (either MEB or SEB), 33 are UNI Europa Graphical and Packaging members (63 %) in 18 Member States (Figure 13).

Figure 13: Scoreboard of the representativeness of UNI Europa Graphical and Packaging, 2023

59 % of trade unions with members in the sector are affiliated with UNI Europa Graphical and Packaging	UNI Europa Graphical and Packaging has at least one affiliated graphical union in 19 Member States	63 % of the trade unions that are involved in collective bargaining for the graphical sector are affiliated with UNI Europa Graphical and Packaging	UNI Europa Graphical and Packaging has at least one affiliated graphical union involved in collective bargaining in 18 Member States



AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK



AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Notes: Green-shaded cells indicate Member States in which at least one graphical trade union is affiliated with UNI Europa Graphical and Packaging; purple-shaded cells indicate Member States in which at least one graphical trade union is involved in collective bargaining; grey-shaded cells indicate Member States in which no graphical trade union was identified. Detailed information is available in Table 39 and Table 41.

Source: Network of Eurofound Correspondents, 2023.

The distribution of the UNI Europa Graphical and Packaging trade unions across the different activities in the sector is presented in Table 37. It is noteworthy that UNI Europa Graphical and Packaging represents at least 60 % of the trade unions, regardless of the graphical subsector. Considering all trade unions in the sector, most are found in the printing of newspapers, the printing of books and binding of printed material. Looking at the trade unions that organise workers in the printing of

([44]) This percentage was calculated based on the available membership data. Given the high share of national-level trade unions that did not provide data or that provided estimations that included other sectors (as listed in Table 39), this calculation should be treated with caution.

wallpapers and the reproduction of recorded media (i.e. the subsectors least covered by trade unions), UNI Europa Graphical and Packaging members make up 67 % and 76 % of the workforce, respectively.

Table 37: Scope of membership domains of sectoral trade unions affiliated with UNI Europa Graphical and Packaging (GP), 2023

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services	Binding of printed material	Other printing	Printing of commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Number of trade unions affiliated with UNI Europa GP	30	27	28	26	28	29	26	24	16	22	21	23	21	23	21	19	23
% of all trade unions in the sector	64	61	60	65	70	71	65	63	67	67	66	70	72	70	75	76	68
Number of Member States with at least one trade union affiliated with UNI Europa GP	18	17	17	16	17	18	17	17	10	14	14	1	14	14	12	11	15
Member States in which **no** trade unions covering this activity are affiliated with UNI Europa GP	LV	LU, LV	LV, NL (*)	LU, LV, NL (*)	CY (*), LV	LV	DK, LV	LV, SI	CY, FI, FR (*), HU, IT, LV, NL (*), PL (*), SI	CY (*), IT, LV, PL, SI	CY (*), IT, LV, NL, SI	CY, LV, SI	CY (*), FI (*), LV, PL (*), SI (*)	CY, LV, NL (*), PL, SI (*)	CY (*), FI, HU (*), LV, NL (*), PL, SI (*)	CY (*), FI, FR (*), HU (*), LV, NL (*), PL, SI	LV, NL (*), PL (*), SI (*)

(*) Member States in which the activity in question is not considered part of the graphical sector. A complete list of the activities that are considered part of the graphical sector in each Member State is available in Table 54 in the Annex.

Note: No trade unions are organising the workers in the sector in Bulgaria, Estonia or Lithuania.

Source: Network of Eurofound Correspondents, 2023.

Affiliation with UNI Europa Graphical and Packaging is equally prevalent among the trade unions representing blue-collar and white-collar workers and does not differ by the size of the companies (Table 38).

Table 38: Trade union coverage by workforce categories and company size groups of sectoral trade unions affiliated with UNI Europa Graphical and Packaging (GP), 2023

		Company size			Geographical coverage		Type of workers				Other sectors in which the trade unions also have members											
	Total	**Large**	**Small**	**Equally large and small**	**Entire Member State**	**Regional substructure**	**Blue collar**	**White collar**	**Management**	**Self-employed**	**Paper**	**Audiovisual**	**Commerce**	**Logistics**	**Transport**	**Postal and courier**	**Graphic design advertising**	**Photographers**	**Production of signage and luminous signs**	**Video game production**	**Production of packaging (including corrugated)**	**Production of other packaging**
Number of UNI Europa (GP) trade unions	**35**	5	2	18	30	14	30	25	15	6	1	15	12	13	10	14	16	10	12	12	18	14
% of all trade unions	**59**	50	67	39	58	56	61	57	50	60	3	60	63	59	53	64	59	59	71	80	60	61
Number of Member States	**19**	5	2	12	19	10	17	16	9	6	1	14	9	10	8	11	13	10	8	8	14	12

Note: Data on coverage of different size groups are not available for 10 unions.

Source: Network of Eurofound Correspondents, 2023.

With the available data, estimating the workforce covered by UNI Europa Graphical and Packaging members can be challenging. There is a higher percentage of unions with declining membership among UNI Europa Graphical and Packaging members than among all unions in the sector (Table 39).

Table 39: Membership strength of trade unions affiliated with UNI Europa Graphical and Packaging, 2023

MS	Trade union	Number of graphical employees affiliated with the trade union	Type/source of information on the number of members		Trend in membership in last two or three years
			Exact number	Estimate	
AT	GPA	2 000		X	Decreasing
BE	ACV-CSC BIE	2 740	X		n/a
	ABVV-FGTB BBTK-SETCa	2 500	X		n/a
	ACLVB-CGSLB	n/a			n/a
	ACV-CSC Puls	n/a			n/a
CY	OBIEK-SEK	70	X		Decreasing
DE	Ver.di	n/a			Decreasing
DK	HK Privat	10 400 ([45])		X	Stable
	3F	1 750	X		Stable
ES	FSC-CCOO	80 000 ([46])	X		Stable
	ELA – Industria eta Eraikuntza	823	X		Increasing
	UGT-FeSMC	n/a			n/a
	UFT-FICA	n/a			n/a
FI	Teollisuusliitto	13 500		X	Increasing
	PRO	990	X		Decreasing
FR	Filpac CGT	n/a			n/a
	F3C-CFDT	n/a			Decreasing
HR	SGIM	800	X		Decreasing
HU	NYDSZ	774	X		Increasing
IE	Unite	n/a			n/a
	SIPTU	n/a			n/a
IT	SLC-CGIL	n/a			Stable
	Fistel-CISL	n/a			Decreasing
	Uilcom-UIL	n/a			n/a

([45]) This estimate includes members in other sectors (both private and public) besides graphical, namely paper, audiovisual, commerce, logistics, transport, postal and courier, creative agencies, advertising, graphic designers, photographers, production of signage (print or digital) and luminous signs, production of video games, production of paper packaging (including corrugated packaging), production of other packaging (other than paper and corrugated), administration, retail, ICT and services.

([46]) This estimate includes members from other sectors besides graphical, namely paper, audiovisual, logistics, transport, postal and courier, creative agencies, advertising, graphic designers, photographers (except communication media), production of signage (print or digital) and luminous signs, production of video games, production of paper packaging (including corrugated packaging) and production of other packaging (other than paper and corrugated).

MS	Trade union	Number of graphical employees affiliated with the trade union	Type/source of information on the number of members		Trend in membership in last two or three years
			Exact number	Estimate	
LU	LCGB-Services	n/a			Decreasing
	OGB-L – imprimerie, médias, culture, FLTL	n/a			Decreasing
LV	LKDAF	50	X		Decreasing
NL	FNV Media en Cultuur	n/a			n/a
PL	ZZP	3 000		X	n/a
PT	Sindetelco	200		X	n/a
	Sinttav	72	X		Increasing
SE	GS	6 109	X		Stable
	Unionen	1 290	X		Increasing
	SI	50	X		Decreasing
SI	Pergam	860	X		Stable

Notes: MS, Member State; n/a, data not available. No affiliation information was provided for CNV in the Netherlands. UNI Europa Graphical and Packaging indicated that the Spanish union UGT-FeSMC is a member, but this was not confirmed by the trade union, which declined to participate in the study.

Source: Network of Eurofound Correspondents, 2023.

Close to half of all UNI Europa Graphical and Packaging members in the sector are involved in both SEB at the company level and MEB at the sector level; lower percentages of UNI Europa Graphical and Packaging members in the sector are engaged in SEB only or MEB only (Table 40).

Table 40: Overview of the involvement in collective bargaining of the trade unions affiliated with UNI Europa Graphical and Packaging in the EU-27, 2023

Type of collective bargaining	Member State(s)	Number of trade unions	% of all UNI Europa Graphical and Packaging graphical sector members	% of all the trade unions in the sector
Unions engage only in SEB	HR, HU, IE, PL	5	14	50
Unions engage only in MEB	AT, CY, FI, SE	7	20	58
Unions engage in both SEB and MEB	BE, DE, ES, FR, IT, NL, SI	16	46	76
Some unions engage in SEB, other unions engage in MEB	DK, LU, PT	6	17	43
No collective bargaining	LV	1	3	50
All types of collective bargaining		**35**	**100**	**63**

Source: Network of Eurofound Correspondents, 2023.

As regards whether UNI Europa Graphical and Packaging members are consulted by the government, participate in bipartite or tripartite dialogue or are involved in paritarian organisations, the percentages are higher for UNI Europa Graphical and Packaging members than for all unions in the sector as Table 41 shows. The vast majority (30) of the UNI Europa Graphical and Packaging affiliates are recognised as representative social partner organisations based on national criteria, while more than half (18) are consulted by the government on sector-related matters. Half of the UNI Europa Graphical and Packaging members (16) are involved in paritarian initiatives and almost half (14) are involved in bipartite social dialogue. A quarter (eight) of the UNI Europa Graphical and Packaging members are involved in tripartite social dialogue for the graphical sector, which is a higher share than that recorded for all of the sectoral unions identified (18 %) in Table 22.

Table 41: Role of the graphical trade unions affiliated with UNI Europa Graphical and Packaging in the national industrial relations landscape, 2023

MS	Trade union	Basis of representativeness	% of workers covered by collective bargaining in the sector	Involved in collective bargaining?		Involved in social dialogue bodies?		Involved in paritarian organisations?	Consulted by the government on sector-related matters?	Affiliated with a national confederation and, if so, which one(s)?
				MEB	SEB	Bipartite	Tripartite			
Number of trade unions	35	LR = 15, MR = 15, n/a = 5		26	23	14	8	16	18	30
Number of MSs	19	LR = 8, MR = 8, n/a = 3		14	14	7	4	8	8	16
AT	GPA	MR	10–15	Yes	No	Yes	No	No	No	ÖGB
BE	ACV-CSC BIE	LR	96–100	Yes	Yes	Yes	No	Yes	Yes	ACV-CSC
	ABVV-FGTB BBTK-SETCa	LR	96–100	Yes	Yes	Yes	No	Yes	Yes	ABVV-FGTB
	ACLVB-CGSLB	LR	96–100	Yes	Yes	Yes	No	Yes	Yes	ACLVB-CGSLB
	ACV-CSC Puls	LR	96–100	Yes	Yes	Yes	No	Yes	Yes	ACV-CSC
CY	OBIEK-SEK	MR	> 16.6	Yes	No	No	No	Yes	No	SEK
DE	Ver.di	MR	n/a	Yes	Yes	No	No	Yes	Yes	DGB
DK	HK Privat	MR	E: 80–85	Yes	Yes	No	Yes	No	Yes	FH
	3F	MR	E: 80–85	Yes	No	No	Yes	No	Yes	FH
ES	FSC-CCOO	LR	100	Yes	Yes	No	No	Yes	No	CCOO
	ELA – Industria eta Eraikuntza	LR	100	Yes	Yes	No	No	No	No	ELA (active only in the Basque Country)
	UGT-FICA	LR	100	Yes	Yes	No	Yes	Yes	n/a	UGT
	UGT-FeSMC	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	UGT
FI	Teollisuusliitto	MR	59.20	Yes	No	Yes	Yes	Yes	Yes	SAK
	PRO	MR	59.20	Yes	No	Yes	Yes	No	Yes	STTK
FR	Filpac CGT	LR	100	Yes	Yes	Yes	No	Yes	Yes	CGT
	F3C-CFDT	LR	100	Yes	Yes	Yes	No	Yes	Yes	CFDT
HR	SGIM	LR	30–35	No	Yes	Yes	No	No	No	ITUC

MS	Trade union	Basis of representativeness	% of workers covered by collective bargaining in the sector	Involved in collective bargaining?		Involved in social dialogue bodies?		Involved in paritarian organisations?	Consulted by the government on sector-related matters?	Affiliated with a national confederation and, if so, which one(s)?
				MEB	SEB	Bipartite	Tripartite			
HU	NYDSZ	LR	15	No	Yes	Yes	No	No	No	MASZSZ
IE	SIPTU	n/a	~ 43	No	Yes	n/a	n/a	n/a	n/a	
	Unite	n/a	~ 43	No	Yes	n/a	n/a	n/a	n/a	
IT	SLC-CGIL	MR	~ 100	Yes	Yes	Yes	Yes	Yes	Yes	CGIL
	Fistel-CISL	MR	~ 100	Yes	Yes	Yes	Yes	Yes	Yes	CISL
	Uilcom-UIL	MR	~ 100	Yes	Yes	Yes	Yes	Yes	Yes	UIL
LU	LCGB-Services	LR	n/a	No	Yes	No	No	No	No	LCGB
	OGB-L – imprimerie, médias, culture, FLTL	LR	n/a	Yes	No	No	No	No	No	OGB-L
LV	LKDAF	n/a	0	No	No	No	No	No	No	FTUCL
NL	FNV Media en Cultuur	n/a	n/a	Yes	Yes	n/a	n/a	n/a	n/a	n/a
PL	ZZP	LR	n/a	No	Yes	n/a	n/a	n/a	Yes	n/a
PT	Sindetelco	MR	~ 58	Yes	No	No	No	No	n/a	UGT
	Sinttav	MR	~ 58	No	Yes	No	No	No	No	CGTP
SE	GS	MR	80–90	Yes	No	No	No	Yes	Yes	LO
	Unionen	MR	80–90	Yes	No	No	No	Yes	Yes	TCO
	SI	MR	80-90	Yes	No	No	No	No	Yes	TCO
SI	Pergam	LR	50	Yes	Yes	No	No	No	No	Pergam is a national confederation

Notes: LR, legal requirement; MR, mutual recognition; MS, Member State; n/a, data not available.

Source: Network of Eurofound Correspondents, 2023.

3.2. Sectoral trade unions not represented in the social dialogue committee for the graphical sector

Of the 59 sectoral trade unions identified in Chapter 2, 24 are not affiliated with UNI Europa Graphical and Packaging or have no clear data on affiliation and thus are not represented in the ESSDC for the graphical industry. These unions will be referred to as 'non-represented' in the graphical ESSDC in the report. Table 42 lists these non-represented unions, including CNV in the Netherlands, for which no clear data on affiliation were provided. Based on the available data, the collective workforce of these 24 non-represented unions constitutes a little over a third (35 %) ([47]) of the total graphical sector (comprising printing activities and activities related to printing (NACE 18.1) and the reproduction of recorded media activities (NACE 18.2)) workforce in the EU-27 in 2022.

Table 42: Membership strength of trade unions not affiliated with UNI Europa Graphical and Packaging, 2023

MS	Trade union	Number of members in the sector trade union	Type/source of information on number of members		Trend in membership in last two or three years
			Exact number	Estimate	
BE	*ACV-CSC CNE*	n/a	n/a	n/a	n/a
CY	ΣΕΒΕΤΤΥΚ	62	X		n/a
CZ	TB	550	X		n/a
EL	OMTBX	4 350 ([48])		X	n/a
ES	FI-USO	126 000 ([49])	X		n/a
	CCOO-Industria	n/a	n/a	n/a	n/a
	LAB	45 000 ([50])		X	n/a
	UGT-SP ([51])	n/a	n/a	n/a	n/a
FI	SJL	3 500		X	Decreasing
FR	Fédération FO Livre	n/a	n/a	n/a	Stable
	FC-CFTC	n/a	n/a	n/a	Increasing
	IP-CFE-CGC	n/a	n/a	n/a	n/a
LV	LPNA	50	X		Decreasing
MT	GWU	1 400		X	Stable
NL	De Unie	n/a	n/a	n/a	n/a
	CNV	n/a	n/a	n/a	n/a
PT	Fiequimetal	800		X	n/a
	SIMA	30		X	Decreasing
RO	USTR	535	X		n/a
SE	Ledarna	641	X		Stable
	Pappers	13 000 (most in paper, not graphical)	X		Decreasing

([47]) This percentage was calculated based on the available membership data. Given the high share of national-level trade unions that did not provide data or that provided estimations that included other sectors (as listed in Table 42), this calculation should be treated with caution.
([48]) This figure is that for the graphical sector combined with the paper sector.
([49]) This includes members from other sectors besides graphical, namely paper and audiovisual. More information has not been provided.
([50]) This estimate includes members from other sectors besides graphical, namely paper, audiovisual, logistics, transport, and postal and courier.
([51]) UGT-SP is not affiliated with UNI Europa Graphical and Packaging, but there is cooperation.

MS	Trade union	Number of members in the sector trade union	Type/source of information on number of members		Trend in membership in last two or three years
			Exact number	Estimate	
	SEKO	200		X	Stable
SI	SGDS	400	X		Stable
SK	SOZPP	120	X		Decreasing

Notes: MS, Member State; n/a, data not available. Trade unions in italics are active in only part(s) of the Member State.

Source: Network of Eurofound Correspondents, 2023.

Looking at the activities in which the non-represented unions have members, the situation is similar to the general picture of the graphical unions described in Chapter 2, with the printing of newspapers and the printing of magazines subsectors being the best represented (Table 59 in the Annex). The situation is also similar to the general picture in terms of the size of companies in which most members of the non-represented unions are working, and their geographical dispersion (Table 60 in the Annex).

Table 43 presents the type of collective bargaining in which non-represented unions engage and the role they play in the national industrial relations landscape. Only the Greek UNI Europa Graphical and Packaging affiliate is not engaged in any collective bargaining, while for four other unions from the Netherlands and Spain there are no data on involvement in collective bargaining. Six trade unions engage only in MEB and another six trade unions engage only in SEB. Finally, six trade unions engage in both SEB and MEB.

Table 43: Role of non-represented graphical trade unions in the national industrial relations landscape, 2023

MS	Trade union	Basis of representativeness	% of sectoral workforce covered by collective bargaining	Involved in collective bargaining?		Involved in social dialogue bodies?		Involved in paritarian organisations?	Consulted by the government on sector-related matters?	Affiliated with a national confederation and, if so, which one?
				MEB	SEB	Bipartite	Tripartite			
Number of trade unions	24	LR = 10, MR = 10, n/a = 4, n/r = 1		11	12	7	1	6	8	13
Number of MSs	15			8	10	5	1	4	6	9
BE	*ACV-CSC CNE*	LR	n/a	Yes	Yes	Yes	No	Yes	Yes	ACV-CSC
CY	ΣΕΒΕΤΤΥΚ	MR	> 16.6	Yes	No	No	No	Yes	No	PEO
CZ	TB	MR	10	No	Yes	Yes	No	No	No	No
EL	OMTBX	Both	1.40	No	No	No	No	No	No	GSEE
ES	FI-USO	LR (only for the metal graphical sector)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	CCOO-Industria	LR (only for the metal graphical sector)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	LAB	LR	100 (of the Basque Country)	Yes	Yes	n/a	n/a	No	No	LAB (covering only the Basque Country)
	UGT-SP ([52])	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	UGT
FI	SJL	MR	59.20	Yes	No	Yes	Yes		Yes	No
FR	Fédération FO Livre	LR	100	Yes	Yes	Yes	No	Yes	Yes	CGT-FO

([52]) UGT-SP is not affiliated with UNI Europa Graphical and Packaging, but there is cooperation.

MS	Trade union	Basis of representativeness	% of sectoral workforce covered by collective bargaining	Involved in collective bargaining?		Involved in social dialogue bodies?		Involved in paritarian organisations?	Consulted by the government on sector-related matters?	Affiliated with a national confederation and, if so, which one?
				MEB	SEB	Bipartite	Tripartite			
	FC-CFTC	LR	100	Yes	Yes	Yes	No	Yes	No	CFTC
	IP-CFE-CGC	LR	100	Yes	Yes	Yes	No	Yes	No	CGT
LV	LPNA	MR	0	No	Yes	No	No	Yes	Yes	No
MT	GWU	LR	70	No	Yes	No	No	No	Yes	No
NL	De Unie	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	CNV	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
PT	Fiequimetal	MR	~ 58	No	Yes	No	No	No	n/a	CGTP
	SIMA	MR	~ 58	Yes	No	No	No	No	No	No
RO	USTR	n/r	< 4	No	Yes	Yes	No	No	No	BNS
SE	Ledarna	MR	80–90	Yes	No	No	No	No	Yes	No
	Pappers	MR	80–90	Yes	n/a	No	No		Yes	LO
	SEKO	MR	80–90	Yes	No	No	No	No	Yes	LO
SI	SGDS	LR	50	Yes	Yes	No	No	No	No	Pergam
SK	SOZPP	n/a	9	No	Yes	n/a	n/a	n/a	n/a	n/a

Notes: LR, legal requirement; MR, mutual recognition; MS, Member State; n/a, data not available; n/r, not relevant. Trade unions in italics are active in only part(s) of the Member State.

Source: Network of Eurofound Correspondents, 2023.

3.3. Other European organisations with which national trade unions are affiliated

Table 35 shows whether the national trade unions active in the graphical sector are affiliated with UNI Europa Graphical and Packaging or other European organisations. As already mentioned in the previous sections, 35 trade unions (in 19 Member States) are affiliated with UNI Europa Graphical and Packaging. Of these 35 trade unions, 14 (located in 10 Member States) are also affiliated with industriAll Europe. industriAll Europe in total has 14 unions affiliated. Three unions affiliated with industriAll Europe are not affiliated with UNI Europa Graphical and Packaging: ACV-CSC CNE in Belgium, GWU in Malta and SIMA in Portugal. As regards those affiliated with other European organisations, most unions (35 of the 59) report no affiliation with another European organisation for the graphical sector. Information on affiliation is missing for eight trade unions. Finally, the Belgian trade union ABVV-FGTB BBTK-SETCa reports affiliations with the European Transport Workers' Federation (ETF), European Federation of Food, Agriculture, and Tourism Trade Unions (EFFAT) and the European Public Service Union (EPSU), while the Danish trade union HK Privat reports an affiliation with Information and Communication Technology Related Services (ICTS).

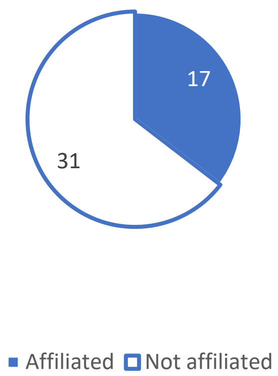
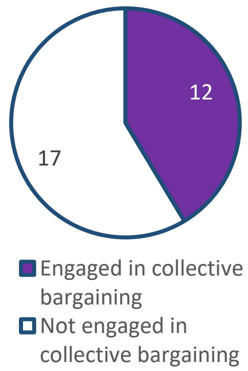
3.4. Representativeness of Intergraf in the graphical sector

Intergraf is the European printing industry association representing employers in the graphical sector. Its membership comprises 22 national printing organisations in 21 countries as full members and 13 companies from across Europe as associate members. Of the 22 national printing organisations that are members of Intergraf, 17 are located in Member States, while the remaining 5 are in Iceland (1), Norway (1), Switzerland (2) and the United Kingdom (1). Based on the available data, the number of companies represented by Intergraf is a little over 3 000, which constitutes less than 1 % of the total number of companies in the sector. They are dominated by microcompanies and small companies and employ around 12 % ([53]) of the sectoral workforce in the EU-27. Comparing Intergraf membership in terms of the number of members with the situation depicted in the 2016 Eurofound graphical sector report, the membership appears to be stable.

Figure 14 provides an overview of the representativeness of Intergraf. Seventeen (35 %) of the sector's 48 employer organisations in 17 Member States are affiliated with Intergraf. Of the 29 employer organisations involved in sector-related collective bargaining, 12 (41 %) are members of Intergraf. These 12 organisations are located in 12 Member States. No data on involvement in collective bargaining or the role in the national industrial relations landscape were provided for the Irish Printing Federation, which is not an Intergraf affiliate.

([53]) This percentage was calculated based on the available membership data. Given the high share of national-level organisations that did not provide data or that provided estimations that included other sectors (as listed in Table 46), this calculation should be treated with caution.

Figure 14: Scoreboard of the representativeness of Intergraf

35 % of employer organisations with members in the sector are affiliated with Intergraf	Intergraf has one affiliated graphical employer organisation in 17 Member States			41 % of employer organisations involved in sector-related collective bargaining (54) are affiliated with Intergraf (12/29)	Intergraf members are involved in graphical collective bargaining in 12 Member States		
	AT	ES	LV		AT	ES	LV
	BE	FI	MT		BE	FI	MT
	BG	FR	NL		BG	FR	NL
	CY	HR	PL		CY	HR	PL
	CZ	HU	PT		CZ	HU	PT
	DE	IE	RO		DE	IE	RO
	DK	IT	SE		DK	IT	SE
	EE	LT	SI		EE	LT	SI
	EL	LU	SK		EL	LU	SK

Notes: Blue-shaded cells indicate Member States in which at least one graphical employer organisation is affiliated with Intergraf; purple-shaded cells indicate Member States in which Intergraf affiliates are involved in collective bargaining; Greece is shaded grey, as no graphical employer organisation was identified. Note that, in Poland, Flekso is affiliated with Intergraf indirectly via FTA Europe, a sister organisation of Intergraf representing the interests of the European flexographic printing industry.

Source: Network of Eurofound Correspondents (2023); summary of detailed information listed in Table 46 and Table 48.

As can be seen in Table 44, employer organisations affiliated with Intergraf are involved in most of the 'typical activities' in the sector (e.g. printing of newspapers, printing of books and printing of magazines). As information on Intergraf members regarding the sectors in which they are active is more complete, the percentage of Intergraf members among the employer organisations for which there is information is very high (50 % or higher in 10 of the 17 sectors). In some Member States (e.g. Austria and Italy), Intergraf members appear to be active in only a few sectors.

(54) Sector-related collective bargaining here includes both SEB and MEB.

Table 45 shows the size of companies covered by Intergraf members and the other sectors (related to graphical) that Intergraf members are active in. Intergraf members are primarily present in larger firms (with over 50 employees), and member companies' activities include mostly the production of packaging, commerce, signage and photography.

Table 44: Scope of membership domains of sectoral employer organisations affiliated with Intergraf, 2023

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services (typesetting and electronic make-up)	Binding of printed material	Other printing	Printing of commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Number of employer organisations affiliated with Intergraf	14	15	15	15	15	16	12	14	11	13	13	12	10	14	5	4	10
Number of employer organisations (independent of affiliation) active in each sector	32	32	33	31	33	32	30	30	17	23	23	24	18	25	10	7	19
% of Intergraf members among all employer organisations in the sector	44	47	46	48	46	50	40	47	65	57	7	50	56	56	50	57	53
Number of employer organisations affiliated with Intergraf that	2	1	1	1	1	0	4	1	4	2	2	3	6	2	10	11	6

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services (typesetting and electronic make-up)	Binding of printed material	Other printing	Printing of commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
are not active in the sector																	
Number of employer organisations affiliated with Intergraf for which no data on activity in the sector is available	0	0	0	0	0	0	1 (IT)	1 (IT)	1 (IT)	1 (IT)	1 (IT)	1 (IT)	0	0	1 (IT)	1 (IT)	0
Number of Member States in which employer organisations affiliated with Intergraf cover this activity	14	15	15	15	15	16	12	14	11	13	13	12	10	14	5	4	10

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services (typesetting and electronic make-up)	Binding of printed material	Other printing	Printing of commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Member States in which employer organisations affiliated with Intergraf do not cover this activity	AT, FR (*)	AT	AT	AT	AT		AT, BG, EE, IT	AT	AT (*), EE (*), FI, FR (*)	AT (*), FI	AT, FR	AT (*), FI, FR	BG (*), DK (*), EE, FI (*), FR (*), LV	AT, DK (*)	AT (*), BE, BG (*), DK (*), EE, FI, HU (*), LV, NL (*) RO (*)	AT (*), BE, BG (*), DE, DK (*), EE, FI, FR (*), HU (*), NL (*), RO	BE, DE, EE (*), FR, NL (*), RO

Notes: (*) Member States in which the activity in question is not considered part of the graphical sector. A complete list of the activities that are considered part of the graphical sector in each Member State is available in Table 54 in the Annex.

Source: Network of Eurofound Correspondents, 2023.

Table 45: Employer organisation coverage by workforce categories and company size groups for employer organisations affiliated with Intergraf, 2023

	Size					Geographical coverage		Size group of largest proportion of members			Other sectors											
	Self-employed workers	1–9 employees	10–49 employees	50–249 employees	250+ employees	Entire Member State	Regional substructure	250+	10–249	0–9	Paper	Audiovisual	Commerce	Logistics	Transport	Postal and courier	Graphic design advertising	Photographers	Production of signage (print or digital) and luminous signs	Video game production	Production of packaging (including corrugated)	Production of other packaging
Number of employer organisations	8	18	25	20	17	24	7	5	11	5	6	4	1	3	3	2	8	4	5	2	4	2
% of all employer organisations in the sector	62	53	60	54	55	57	58	71	55	83	43	50	14	43	43	33	47	57	50	50	31	20

Source: Network of Eurofound Correspondents, 2023.

Table 46 shows that all of the Intergraf members are the largest employer organisations in the graphical sector in their Member State, except for the Austrian member Propak and the Finnish member GT. In terms of the membership trend, of the 11 members with data available, only the French member UNIIC reported an increasing membership, while six other members reported a stable membership and four reported a decreasing membership.

Table 46: Membership strength of employer organisations that are members of Intergraf, 2023

MS	Employer organisation	Number of sectoral member companies	Sectoral workforce of the member companies	Membership trend in the last two or three years	Rank among the employer organisations in the MS
AT	Propak	Only a few	n/a	n/a	3
BE	Febelgra	Between 250 and 330	n/a	n/a	n/a
BG	UPIB	92	10 %	Stable	1
DE	bvdm	n/a	n/a	n/a	1
DK	Grakom	130	1 522 blue collar 2 585 white collar	Decreased	1
EE	ETPL	30	1 060	Stable	1
FI	GT	125	75–80 %	Decreased	2
FR	UNIIC	624	About 16 000	Increase	1
HU	Fedprint	68	9 950	Stable	1
IT	Assografici	627	38 452	n/a	n/a
LT	LISPA	16	2 000 (including printing)	Stable	1
LU	AMIL	23	n/a	n/a	1
LV	LPUA	28	n/a	Stable	1
NL	KVGO	552	10 131 (March 2022)	Decreased	1
PT	Apigraf	283	Approximately 6 400	Stable	1
RO	ATT	58	2 200	Decreased	1
SE	GF	400	12 000 employees	n/a	1

Notes: MS, Member State; n/a, data not available. 1, largest employer organisation; 2, second-largest employer organisation; 3, neither the first nor the second-largest employer organisation.

Source: Network of Eurofound Correspondents, 2023.

As regards the role that the Intergraf members play in the national industrial relations landscape in their Member States, the majority of them, 12 employer organisations out of the 17 Intergraf members, are involved in collective bargaining for the sector. Seven of the 11 affiliates cover more than half or even the entire national sectoral workforce in their Member States. This is the case in

Belgium, Denmark, Finland, France, Italy, Portugal and Sweden. Table 47 also shows that in five eastern European and Baltic Member States (Bulgaria, Estonia, Latvia, Lithuania and Romania) Intergraf affiliates do not bargain collectively on behalf of their members, while in Hungary the Intergraf member Fedprint supports its member companies in company-level bargaining. In Romania, the Intergraf affiliate cannot bargain, as it is not considered representative according to the national criteria, while in Estonia no such criteria exist. In 13 Member States, the Intergraf members are consulted by the government on sector-related matters, with no data available for Austria and Italy, no consultations taking place in Hungary and the lack of legal representativeness mentioned above preventing this for the Romanian member.

Table 47: Intergraf-affiliated national employer organisations' role in the national industrial relations landscape, 2023

MS	Employer organisation	Basis of representativeness	% of sectoral workforce covered by collective bargaining	Involved in collective bargaining?		Involved in bipartite social dialogue?	Involved in tripartite social dialogue?	Consulted by the government?	Affiliated with a national confederation and, if so, which one(s)?
				MEB	SEB				
AT	Propak	MR	10–15	Yes	No	No	No	n/a	WKO
BE	Febelgra	LR	96–100	Yes	No	Yes	No	Yes	VBO
BG	UPIB (business association)	LR	0	No	No	No	No	Yes	KRIB
DE	bvdm	MR	n/a	Yes	Yes	No	No	Yes	BDA and UDH
DK	Grakom	MR	E: 80–85	Yes	No	No	Yes	Yes	No information
EE	ETPL	No criteria for representativeness	0	No	No	No	No	Yes	n/a
FI	Medialiitto	MR	59.2	Yes	No	Yes	Yes	Yes	Confederation of Finnish Industries
FR	UNIIC	LR	100	Yes	No	Yes	No	Yes	MEDEF, CPME and U2P
HU	Fedprint	LR	15	No	Yes	Yes	No	No	Yes
IT	Assografici	MR	~ 100	Yes	n/a	n/a	n/a	n/a	Yes
LT	LISPA	MR	0	No	No	No	No	Yes	Yes
LU	AMIL	Both		Yes	No	No	No	Yes	Yes
LV	LPUA	Both	0	No	No	No	No	Yes	Yes
NL	KVGO	Both	n/a	Yes	No	Yes	No	Yes	Yes
PT	Apigraf	MR	~ 58 %–100 ([55])	Yes	No	No	No	Yes	CIP
RO	ATT (business association)	Not representative	0	No	No	Yes	No	No	FIGPA
SE	GF	MR	80–90	Yes	No	Yes	No	Yes	Yes

Notes: LR, legal requirement; MR, mutual recognition; MS, Member State; n/a, data not available.

Source: Network of Eurofound Correspondents, 2023.

([55]) The Eurofound correspondent indicated 58 % during the review of the preliminary findings, but Intergraf corrected the share to 100 % based on the legal extension of the collective bargaining agreements.

3.5. Sectoral employer organisations not represented in the social dialogue committee for the graphical sector

This section covers employer organisations that are not represented by Intergraf and thus not represented in the ESSDC for the graphical industry. These employer organisations will be referred to as 'non-represented' in the graphical ESSDC. Of the 48 employer organisations, 26 have confirmed not to be Intergraf members while, for five organisations, there is no clear information on Intergraf affiliation, making the total number of non-represented employer organisations 31 (around 65 %) in 17 Member States.

Of the 17 Member States in which non-Intergraf members are found, as shown in Table 48, seven (Austria, Belgium, Denmark, Finland, France, the Netherlands and Sweden) also have employer organisations that are Intergraf members. In these instances, the Intergraf member is the largest employer organisation in Denmark, France, the Netherlands and Sweden. Only in Finland is the non-represented employer organisation the largest. As for the trend in membership, there is no difference between Intergraf members and those non-represented in the ESSDC.

Table 48: Membership strength of national employer organisations that are not affiliated with Intergraf, 2023

MS	Employer organisation	Number of graphical member companies	Sectoral workforce of members	Membership trend in the last two or three years	Rank of employer organisation in the MS
AT	VZÖ	~ 50	n/a	n/a	3
	BIK	9 315	Very small (only artisan bookbinders)	n/a	3
	VDMT	200, including companies outside the graphical sector	50 %, including the workforce of the members outside the graphical sector	Stable	2
	FVD	**1 296** (56)	**> 6 000**	**Decreased**	**1**
BE	BNM	8	n/a	n/a	2
CY	**CMPA**	**10**	**~ 150**	**Decreased**	**1**
CZ	**SPP**	**39**	**1 500**	**Stable**	**1**
DK	DMA	15–20	n/a	Decreased	2
ES	**Feigraf**	**3 000**	**35 000**	**Slightly decreased**	**1**
	AFCO	200	n/a	n/a	2
	AME	30	n/a	n/a	n/a
	ADEGI	1 051	60 005 in total (cross-sectoral)	n/a	n/a
	FGEE	788 (57)	12 760 (59)	Increased	n/a (58)
FI	**Medialiitto**	**50**	**60–65 % (employer organisation estimate)**	**Stable**	**1**
FR	GMI	217	3 686 (2021)	n/a	2

(56) This is the number of active business licences recorded by the FVD, which is the mandatory employer organisation in the printing sector in Austria.
(57) This includes editors and companies in editorial production.
(58) FGEE is considered an employer organisation for editorial activities and predominantly has editing companies among its members; therefore, it cannot be ranked for the graphical sector.

MS	Employer organisation	Number of graphical member companies	Sectoral workforce of members	Membership trend in the last two or three years	Rank of employer organisation in the MS
HR	**HUP – UGN**	**10**	**15–20 %**	**Stable**	**1**
IE	**Irish Printing Federation**	**n/a**	**n/a**	**n/a**	**1**
IT	AIE	300	n/a	n/a	n/a
	ANES	**150**	**n/a**	**n/a**	**1**
MT	MEA	30	1 450 (estimate)	Stable	n/a
	SME Chamber	32	n/a	Stable	3
NL	Vereniging Repro Nederland	18	240	Stable	n/a
PL	**Flekso (business association)**	**~ 100**	**n/a**	**Increased**	**1** ([59])
	PIO (business association)	~ 80	n/a	Increased	n/a
	PASDP (business association)	~ 80	> 1 000	Increased	n/a
	Polish Chamber of Printing (business association)	n/a	n/a	n/a	n/a
	Polish Papermakers Association	n/a	n/a	n/a	n/a
SE	Almega	600	36 000 (including non-graphical workers)	Decreased	2
SI	**GZS-MZ**	**10 % of small and medium-sized companies**	**5 %**	**Stable**	**1**
	ZDS	At least 10 % of all companies	10 %	Stable	n/a
SK	**ZPnS.sk**	**30**	**1 200**	**n/a**	**1**

Notes: MS, Member State; n/a, data not available. 1, largest employer organisation; 2, second-largest employer organisation; 3, neither the first nor the second-largest employer organisation. Grey-shaded cells indicate organisations that did not confirm that they are not affiliated with Intergraf but, as they are not listed as affiliated on the Intergraf website, they have been counted as non-represented; bold font is used for the largest employer organisation in the graphical sector in the Member State.

Source: Network of Eurofound Correspondents, 2023.

As Table 61 in the Annex shows, the non-represented employer organisations have member companies active in most of the ‘typical activities’ in the sector (e.g. printing of newspapers, printing of books and printing of magazines) and in pre-press and pre-media services, printing of packaging, commercial printing and other printing.

Regarding involvement in collective bargaining (Table 49), of the 31 non-represented employer organisations, 18 (58 %) are involved in collective bargaining, which is slightly lower than the percentage for Intergraf members (12 out of 17 (70 %)). Just over half (16 out of 31 (52 %)) of the non-represented employer organisations are consulted by their governments on sector-related matters.

([59]) Author’s assessment; not confirmed by the national correspondent.

Table 49: Role of non-represented graphical employer organisations in the national industrial relations landscape, 2023

MS	Employer organisation	Basis of representativeness	% of sectoral workforce covered by collective bargaining	Involved in collective bargaining?		Involved in social dialogue bodies?		Consulted by the government?	Affiliated with a national confederation and, if so, which one?
				MEB	SEB	Bipartite	Tripartite		
Number of organisations				**17**	**1**	**6**	**5**	**16**	**13**
Number of MSs				**11**	**1**	**6**	**4**	**13**	**12**
AT	VZÖ	MR	10	Yes	No	No	No	No	No
	BIK	MR	< 5	Yes	No	No	No	n/a	WKO
	VDMT	Not representative	0	No	No	No	No	Yes	No
	FVD	n/a	0	No	No	No	No	n/a	WKO
BE	BNM	LR	96–100	Yes	No	Yes	No	Yes	No
CY	CMPA	MR	> 16.6	Yes	No	No	No	Yes	Cyprus Employers and Industrialists Federation
CZ	SPP	MR	10	No	No	Yes	No	Yes	Union of the Employers Associations of the Czech Republic
DK	DMA	MR	< 30	Yes	No	No	Yes	Yes	Confederation of Danish Employers
ES	Feigraf	LR	100	Yes	n/a	No	Yes	Yes	No
	AFCO	LR	99	Yes	n/a	No	No	n/a	n/a
	AME	LR	n/a (60)	Yes	No	No	No	n/a	Confemetal
	ADEGI	n/a/	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	FGEE	LR	n/a (61)	Yes	No	Yes	Yes	Yes	No
FI	Medialiitto	MR	65	Yes	No	Yes	Yes	Yes	Confederation of Finnish Industries
FR	GMI	LR	100	Yes	No	Yes	No	Yes	CPME

(60) 100 % of the metallographic sector.
(61) 100 % of the editing workforce through a national collective agreement.

MS	Employer organisation	Basis of representativeness	% of sectoral workforce covered by collective bargaining	Involved in collective bargaining?		Involved in social dialogue bodies?		Consulted by the government?	Affiliated with a national confederation and, if so, which one?
				MEB	SEB	Bipartite	Tripartite		
HR	HUP – UGN	LR	30–35	No	No	No	No	Yes	Croatian Employer Association
IE	Irish Printing Federation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	IBEC
IT	AIE	MR	~ 100	Yes	n/a	n/a	n/a	n/a	Confindustria
	ANES	MR	~ 100	Yes	n/a	n/a	n/a	n/a	No
MT	MEA	LR	70	No	Yes	No	No	Yes	No
	SME Chamber	n/a	n/a	No	No	No	No	Yes	No
NL	Vereniging Repro Nederland	Both	< 1 (estimate)	Yes	No	Yes	No	No	No
PL	Flekso (business association)	Not representative	0	No	No	No	No	Yes	No
	PIO (business association)	Not representative	0	No	No	No	No	Yes	No
	PASDP (business association)	Not representative	0	No	No	No	No	No	No
	Polish Chamber of Printing (business association)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Polish Papermakers Association	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
SE	Almega	MR	80–90	Yes	No	No	No	Yes	Confederation of Swedish Enterprise
SI	GZS-MZ	LR	50	Yes	No	No	No	No	Chamber of Commerce and Industry of Slovenia
	ZDS	MR	50	Yes	No	No	No	No	No
SK	ZPnS.sk	MR	9	No	No	No	Yes	Yes	No

Notes: LR, legal requirement; MR, mutual recognition; MS, Member State; n/a, data not available.

Source: Network of Eurofound Correspondents, 2023.

3.6. Other European organisations with which national sectoral employer organisations are affiliated

Table 36 shows that, of the employer organisations for which there is information, 23 report being affiliated with other European or worldwide organisations: 10 are affiliated with the Screen Printing, Digital Printing and Textiles Printing Association (FESPA), three report being affiliated with the International Confederation of Paper and Board Converters in Europe (CITPA), two are members of the Confederation of European Paper Industries (CEPI), another two are members of European Media Management Association (EMMA), and finally another two report being affiliated with an organisation that extends beyond Europe: the World Association of News Publishers (WAN-IFRA).

3.7. Representativeness of UNI Europa Graphical and Packaging and Intergraf in the Member States with the largest workforces

This section describes the membership of the ESSDC-represented organisations in the six Member States (France, Germany, Italy, Poland, Spain and Sweden) with the largest graphical sector workforce in absolute numbers and in the seven Member States (Croatia, Denmark, Estonia, Finland, France, Malta and Sweden) in which the proportion of graphical sector employment among total employment is higher than 1 %. Employees in the Member States with the largest graphical sector employment levels are represented in the ESSDC by at least one trade union in each Member State (Table 50). It is noteworthy that, in the case of Germany, the only trade union and the only employer organisation representing the workers and companies in the sector are represented in the ESSDC. The same is not true for employers in all of these Member States, as, in two (Poland and Spain), no employer organisation is involved in the ESSDC. In all except Poland, the union represented in the ESSDC engages in sectoral collective bargaining. In Poland, the union, which is affiliated with UNI Europa Graphical and Packaging, engages in only SEB. In the four Member States in which a national employer organisation is represented in the ESSDC, the employer organisation represented in the ESSDC engages in sectoral-level collective bargaining.

Table 50: Overview of the representation of the national social partner organisations from the six Member States with the largest sectoral workforce in the ESSDC

MS	Total number of people employed (2022)	At least one national trade union represented in the ESSDC	At least one national trade union involved in collective bargaining that is represented in the ESSDC	At least one national employer organisation represented in the ESSDC	At least one national employer organisation involved in collective bargaining that is represented in the ESSDC
DE	383 357				
FR	210 012				
ES	107 787				
IT	105 070				
PL	91 160				
SE	48 160				

Notes: MS, Member State. Employment refers to the sum of employment in NACE codes 18.1, 18.2, 58.1 and 58.2.

Sources: Eurostat, SBS database; Network of Eurofound Correspondents, 2023.

Employees in five (Croatia, Denmark, Finland, France and Sweden) of the seven Member States in which employment in the graphical sector has a share of over 1 % of total employment are represented in the ESSDC by at least one trade union in the Member State (Table 51). In Estonia, there is no graphical sector trade union, while, in Malta, GWU, the national trade union for the sector, is not affiliated with UNI Europa Graphical and Packaging for its graphical sector employees. In four out of the five Member States, the union represented in the ESSDC is also involved in sectoral-level collective bargaining. In Croatia, the union is involved only in single-employer collective bargaining. Employers in five Member States (Denmark, Estonia, Finland, France and Sweden) are represented in the ESSDC by at least one employer organisation in the Member State. Only in four of these Member States, however, is there an organisation involved in sectoral collective bargaining, as, in Estonia, there is no collective bargaining given that there is no trade union in the sector.

Table 51: Affiliations in the Member States where the graphical sector has a share over 1 % of total employment

MS	% of graphical sector employment in total employment (2022)	At least one national trade union represented in the ESSDC	At least one national trade union involved in collective bargaining that is represented in the ESSDC	At least one national employer organisation represented in the ESSDC	At least one national employer organisation involved in collective bargaining that is represented in the ESSDC
FI	1.40				
SE	1.33				
DK	1.26				
HR	1.07				
MT	1.06				
EE	1.05				
FR	1.04				

Notes: MS, Member State. Employment refers to the sum of employment in NACE codes 18.1, 18.2, 58.1 and 58.2.

Sources: Eurostat, SBS database; Network of Eurofound Correspondents, 2023.

3.8. Capacity to negotiate and represent member organisations

One of the European Commission's criteria for EU-level social partners to be consulted, as described in European Commission Decision 98/500/EC, states that:

> *… they shall consist of organisations, which are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States.* ([62])

Based on Article 155 of the TFEU, European sectoral social partner organisations need to prove their capacity to negotiate on behalf of their members and to enter 'contractual relations, including agreements' (i.e. the capacity to commit themselves and their national affiliates). A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates or if it can receive such a mandate in accordance with a given mandating procedure.

Eurofound has applied the criterion of the 'capacity to negotiate' to both the EU-level partner organisations and, in the bottom-up approach, the national organisations in order to assess their relevance. Following these arguments, the standard Eurofound methodology for assessing the criteria of being an 'integral part of Member State industrial relations' and the 'capacity to negotiate' applies the 'capacity to negotiate agreements' to both the EU and national levels. The mandate / mandating procedure can be either **statutory** (i.e. laid down in the constitution of the organisation or annexed to it) or **non-statutory** (i.e. laid down in secondary documents, such as rules of procedure, memoranda of understanding and/or ad hoc decisions by the governing bodies of the organisation). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in binding agreements, declarations, joint opinions, etc.

As mentioned in Section 0.2, UNI Europa Graphical and Packaging and Intergraf have cooperated within the ESSDC for the graphical industry since 2013. To date, the ESSDC has produced eight joint statements and opinions (listed in Table 1) related to the impact of the European Timber Regulation and other regulating documents (2015), the skills and training needs of the sector (2018), the role of print for the future of reading (2019), the impact of the COVID-19 pandemic on the graphical sector (2020), the Machinery Directive (2022), the lack of neutrality of 'digital by default' or 'digital only' approaches in European legislation (2023) and the priorities of the Packaging and Packaging Waste Regulation in the sector (2024).

UNI Europa Graphical and Packaging is the European workers' industry federation for the graphical sector. Printing and graphical activities represent a cornerstone of the UNI Global Union and its regional organisation UNI Europa, given that this organisation developed through the merging of printer, lithographer and bookbinder unions ([63]), which united under the European Graphical Federation (part of the International Graphical Federation) in the mid 1980s. The UNI Europa Regional Conference, headquartered in Brussels, Belgium, plays a key role in supporting and implementing the decisions of its statutory bodies in order to build a social and democratic Europe. The main statutory body of the UNI Europa Regional Conference is the UNI Europa Executive Committee, the highest hierarchical body within the UNI Europa conferences. This committee is elected by representatives

([62]) 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, OJ L 225/27, 12.8.1998, p. 27.

([63]) Namely the International Printers' Secretariat (founded in 1889), the International Federation of Lithographers and Kindred Traders (founded in 1896) and the International Federation of Bookbinders (founded in 1907).

from the different geographical areas at the regional conference, except for eight members appointed by UNI Europa Graphical and Packaging and four appointed by UNI Media, Entertainment and Arts, as these bodies have special prerogatives within the UNI Europa statutes as founder organisations. UNI Europa's Management Committee is elected by a simple majority of the delegates. The Management Committee is formed of a president, vice-presidents, a regional secretary and presidents representing different UNI Europa sectors (including the Women's Committee, the Youth Committee and the Professional and Managerial Staff Committee). The UNI Europa Graphical and Packaging Steering Committee is elected at the UNI Europa Graphical and Packaging Conference, different from the UNI Europa Regional Conference, every four years and meets three to four times per year. The UNI Europa Regional Conference appoints the Graphical Secretariat. The Secretariat is responsible for implementing the decisions and the sectoral action plan, the most recent version of which was adopted at the end of 2023 for 2024–2028.

Intergraf has a similar long history, originating in Sweden in the early 1920s. The organisation has developed, grown and transformed over the decades ([64]) and was finally renamed Intergraf in 2012. As stated in the 2021 version of its statutes, Intergraf is a non-profit organisation aiming to 'collect, prepare and disseminate information … of general interest to the printing and digital communication industries'; to develop and refine the international management and standards of the graphical industry; to participate, with opinions and studies, in all fields relating to the printing and related industries 'including the programmes of the European Union and other international bodies'; to inform and educate its members through seminars, conferences, congresses and exhibitions in their sectors of activity; to represent the European members at the World Print & Communication Forum; to maintain its international secretariat 'to represent the printing and digital communication industries before all international institutions and associations'; and, finally, to cooperate, when 'appropriate, with other professional associations and players in the industry' (Article 4). According to the statutes, any national or international organisation can become a member of Intergraf (Article 5). The General Assembly, composed of the members' delegates, is the governing body of the organisation (Article 11). Associate and/or corresponding members have no voting rights in the General Assembly (Article 12).

UNI Europa

According to Article 3.1(o) of its statues from 5 October 2011, **UNI Europa is endowed with a clear statutory mandate**: UNI Europa shall seek to fulfil the objectives by, inter alia, 'undertaking collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee'. Additionally, 'UNI Europa shall seek to fulfil the objectives as identified in Article 2 by … undertaking collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee.' The statutes do not contain more specific provisions on how this mandate is given or on the process of ratification of the agreements concluded. Any social partner agreement that is concluded would require an endorsement by the sectoral responsible body and the UNI Europa Executive Committee.

([64]) In the 1930s, it was established as the International Bureau of the Federations of Master Printers (Berlin, Germany), transforming into the International Master Printers Association in the 1940s (London, United Kingdom) and developing into the International Confederation for Printing & Allied Industries in the 1980s (Brussels, Belgium).

Intergraf

According to Article 11 of its statutes, the General Assembly, which is its governing body, has full power to carry out Intergraf's aims listed above, but there is no specific reference to social dialogue or the mandating capacity to negotiate agreements. The General Assembly meets once a year (Article 13) and can take decisions based on more than half of the member associations represented. In the case of potential binding agreements with the unions in the graphical industry, the previous representativeness study for the graphical sector indicated that Intergraf's General Assembly cannot make such agreements without the suggestion and mandate of the organisation's board, which would require approval and ratification of the General Assembly, which fits under the **non-statutory** mandating procedure (i.e. ad hoc decisions by the governing bodies of the organisation). Based on the available information, the non-statutory mandating procedure described above is still in place.

3.9. Effective participation in the graphical social dialogue committee

To assess the effective participation of UNI Europa Graphical and Packaging and Intergraf in the graphical ESSDC, the (virtual or physical) attendance of the meetings held during 2022, 2023 and 2024 was analysed. Each year, three meetings were held: one in February, one in May/June and a final one in November/December. It is noteworthy that, in Table 52, only national delegates from Member States have been included, even though Intergraf members from Switzerland and the United Kingdom also attended some of the committee meetings. In addition, in some cases, a Member State was represented by several delegates from the same member organisation or from different member organisations; this is not reflected in the table.

Table 52: Effective participation in the graphical ESSDC, 2022–2024

	2022	2023	2024
MSs with trade unions participating in the graphical ESSDC (out of 19 MSs)	7 MSs: BE, DE, ES, FI, FR, SE, SI	6 MSs: BE, DE, ES, FI, IT, SE	7 MSs: BE, DE, ES, FI, IT, PT, SE
MSs where UNI Europa Graphical and Packaging has an affiliate but no participation in the graphical ESSDC (out of 19 MSs)	12 MSs: AT, CY, DK, HR, HU, IE, IT, LU, LV, NL, PL, PT	13 MSs: AT, CY, DK, FR, HR, HU, IE, LU, LV, NL, PL, PT, SI	12 MSs: AT, CY, DK, FR, HR, HU, IE, LU, LV, NL, PL, PT
MSs with Intergraf members participating in the graphical ESSDC (out of 17 MSs)	3 MSs: EE, ES, IT	7 MSs: EE, FI, IT, NL, PT, RO, SE	5 MSs: EE, IT, NL, PT, SE
MSs where Intergraf has an affiliate but no participation in the graphical ESSDC (out of 17 MSs)	14 MSs: AT, BE, DE, DK, FI, FR, HU, LT, LU, LV, NL, PT, RO, SE	10 MSs: AT, BE, DE, DK, ES, FR, HU, LT, LU, LV	12 MSs: AT, BE, DE, DK, ES, FI, FR, HU, LT, LU, LV, RO

Note: MS, Member State.

Source: Author's compilation of data from the European Commission's DG Employment, Social Affairs and Inclusion.

Moreover, Table 35 and Table 36 show that more than half (20 (57 %)) of the UNI Europa Graphical and Packaging affiliates and of the Intergraf members (11 (65 %)) confirmed they are actively involved in the management bodies or the working groups of the European social partners.

The situation of each European social partner in the graphical sector, regarding their sector-relatedness, their role in the Member States' social partner structures, their capacity to negotiate agreements on behalf of their members and their adequate structures to ensure effective participation in the work of the graphical ESSDC, is summarised in Table 53.

Table 53: Comparative overview of the social partners in the graphical sector based on European Commission Decision 98/500/EC criteria

Criteria	UNI Europa	Intergraf		Trade unions not in the graphical ESSDC	Employer organisations not in the graphical ESSDC
Sector-relatedness	35/59 trade unions	17/48 employer organisations		24/59 trade unions	31/48 employer organisations
Coverage of MSs	26 % ([65]) of the total EU-27 workforce in 19 MSs	12 % ([65]) of the total EU-27 workforce in 17 MSs		Unknown % of the total EU-27 workforce, estimated at 35 % in 15 MSs	Unknown % of the total EU-27 workforce in 17 MSs
Capacity to negotiate	Statutory mandate	Non-statutory mandate		n/a	n/a
Adequate structures	9 MSs (out of 19) represented in the graphical ESSDC in 2022–2024	8 MSs (out of 17) represented in the graphical ESSDC in 2022–2024		n/a	n/a

Note: MS, Member State; n/a, data not available.

Sources: Author's compilation based on UNI Europa statutes and Intergraf statutes, attendance data from the European Commission's DG Employment, Social Affairs and Inclusion, and information in Chapters 2 and 3.

([65]) Percentages calculated based on the available membership data. Given the high share of national-level trade unions and employer organisations that did not provide data or have provided estimations including other sectors, these calculations should be treated with caution.

Conclusions

In 2022, there were around 511 000 people employed in the graphical sector in the EU-27, namely in printing and service activities related to printing (NACE 18.1) and reproduction of recorded media (NACE 18.2). This represents 0.32 % of the total employment of the 160 million people employed in the EU-27. In the same year, approximately 95 000 companies were active in NACE 18.1 and NACE 18.2 in the EU-27, which account for 0.30 % of all EU-27 companies. The workers in this sector are organised by 59 trade unions in 24 Member States and the employers are organised by 48 employer organisations in 26 Member States. There is no trade union organising graphical workers in Bulgaria, Estonia or Lithuania, while, in Greece, no employer organisations were identified.

UNI Europa Graphical and Packaging has 35 national sectoral trade unions affiliated in 19 Member States. The five Member States where it has no trade union affiliated, but where there are national sectoral trade unions, are Czechia, Greece, Malta, Romania and Slovakia, which are not among the six Member States with the largest workforces in the sector. In terms of sector-relatedness, UNI Europa Graphical and Packaging organises all types of workers in the sector, in all types of economic activities and all categories of company size. In terms of membership strength, UNI Europa Graphical and Packaging organises 60 % of all national sectoral trade unions, which represent 26 % ([66]) of the entire sectoral workforce, calculated based on available data. More than half (60 %) of the national-level trade unions involved in collective bargaining for the graphical sector are affiliated with UNI Europa Graphical and Packaging. In each of the 23 Member States in which there is collective bargaining ongoing (except Czechia, Malta, Romania and Slovakia), UNI Europa Graphical and Packaging has an affiliated trade union involved in collective bargaining. UNI Europa Graphical and Packaging has a fully formalised mandating procedure and statute-based negotiation capacity.

In terms of future capacity building, there are 24 national sectoral trade unions not represented in the ESSDC. The factors preventing UNI Europa Graphical and Packaging members from 10 Member States from participating in the graphical ESSDC meetings during the past three years would merit further investigation. The study identified 1 other relevant European trade union organisation, industriAll Europe, which has 14 member organisations in 10 Member States; however, only 4 of these 14 unions are also not represented by UNI Europa Graphical and Packaging.

Based on the findings documented in this study, it can be concluded that **UNI Europa Graphical and Packaging is the most representative European trade union organisation in the graphical sector**.

Intergraf has 17 affiliated employer organisations in 17 Member States. In Greece, no national sectoral employer organisations for the graphical sector were identified. The nine Member States where there are national sectoral employer organisations, but none affiliated with Intergraf, are Croatia, Cyprus, Czechia, Ireland, Malta, Poland, Slovakia, Slovenia and Spain, with Poland and Spain being among the six Member States recording the largest workforces in the sector. The sector-relatedness of Intergraf covers all types of companies in all economic activities in the sector and in all company size groups. The membership strength of Intergraf covers 35 % of the national sectoral employer organisations.

([66]) These percentages were calculated based on the available membership data. Given the high share of national-level trade unions that did not provide data or that provided estimations that included other sectors, this calculation should be treated with caution.

The 17 affiliated employer organisations organise a little over 3 000 companies, which constitutes less than 1 % of the total number of companies in the sector, and employ around 12 % ([67]) of the sectoral workforce in the EU-27. A significant proportion (41 %) of the employer organisations involved in collective bargaining for the graphical sector are affiliated with Intergraf. Of the 23 Member States in which there is collective bargaining ongoing in the sector, Intergraf has an affiliate involved in collective bargaining in 12, while it does not have an affiliate involved in collective bargaining in Croatia, Cyprus, Czechia, Ireland, Latvia, Malta, Poland, Slovakia, Slovenia or Spain. In Germany and Hungary, Intergraf has a member organisation that assists its company members in company-level collective bargaining. Intergraf has a non-statutory negotiation capacity, as it can enter negotiations only at the suggestion and mandate of the organisation's board and following approval and ratification of the General Assembly. As in the case of worker representatives, the factors preventing Intergraf members from nine Member States from participating in the graphical ESSDC meetings during the past three years would merit further investigation. The following European organisations have some representativeness in the sector: FESPA, with 10 members; CITPA, with three members; and CEPI, with two members and EMMA with two members.

Based on the findings documented in this study, it can be concluded that **Intergraf is the most representative European employer organisation in the graphical sector**.

([67]) This percentage was calculated based on the available membership data. Given the high share of national-level organisations that did not provide data or that provided estimations that included other sectors, this calculation should be treated with caution.

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Annex

Table 54: Activities considered part of the graphical sector in each Member State, 2023

Activity (NACE code)	AT	BE [68]	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR [69]	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	Number of MSs
Printing of newspapers (18.11)	■	■	■	■	■	■	■	■	■	■	■		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	26
Printing of books (18.12)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	27
Printing of magazines (18.11)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■		■	■	■	■	■		25
Printing on packaging (18.12/82.92)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■		■	■	■	■	■	■	26
Pre-press and pre-media services (typesetting and electronic make-up) (18.13)	■	■	■		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■		25
Binding of printed material (bookbinding and binding of other printed products) (18.14)	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■		26

([68]) In Belgium, only photo printing is included in the photography segment of the graphical sector.
([69]) For France, no information was provided on whether the printed material publishing sector is part of the graphical sector.

Activity (NACE code)	AT	BE (68)	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR (69)	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	Number of MSs
Other printing (18.12)	X	X		X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X		X	X	X	X	X	X	24
Printing of catalogues, advertising and other commercial printing (18.12)	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X		25
Printing on wallpaper (18.12/17.24)		X	X	X	X	X	X		X	X	X		X	X	X	X		X	X	X			X	X	X	X		20
Printing on other surfaces (plastic, textile, etc.) (18.12)		X	X		X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X		23
Security printing (18.12)	X	X	X		X	X	X	X	X	X	X	X	X	X	X	X		X	X	X		X	X	X	X	X		23
Labels (18.12)		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		25
Production of stationery products (18.12)		X			X	X		X		X			X		X	X		X	X	X	X		X		X			14
Large-format printing (18.12)	X	X	X	X	X	X		X	X	X	X	X	X		X	X		X	X	X		X	X	X	X		X	22
Printed electronics (26.11)		X				X		X	X	X	X	X	X		X	X		X	X	X		X	X		X			16
Reproduction of recorded media (18.20)		X			X	X		X		X	X		X			X		X	X	X		X	X	X	X	X		16
Paper and board converting (paper, board, corrugated, etc.) (18.14)		X	X	X	X	X				X		X	X			X		X	X	X			X	X	X			15

Activity (NACE code)	AT	BE [68]	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR [69]	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	Number of MSs
Publishing of printed material (58.1)		■		■	■				■		■		■			■		■	■	■		■	■	■	■		■	15
Online publishing (58.19)				■	■		■				■		■		■	■		■		■			■		■			11
3D printing (18.12)		■				■			■	■		■	■			■		■	■	■		■	■		■			13
Production of video games (58.21)													■							■			■					3
Production of signage (print or digital) and luminous signs (25.99)		■	■			■			■	■		■	■			■			■	■		■	■	■	■			14
Photography (74.20)					■	■	■						■			■		■		■	■		■	■				10
Production of paper packaging (including corrugated packaging) (17.21)			■							■	■		■			■			■				■		■		■	9
Production of other packaging (than paper and corrugated) (17.21)			■							■	■	■	■			■			■		■		■		■			10
Number of activities covered in each Member State	10	20	16	13	19	20	14	15	17	21	19	16	25	12	16	24	7	21	22	23	10	17	25	18	23	13	7	

Notes: MS, Member State. Green-shaded cells indicate that the activity forms part of the graphical sector. Blank cells indicate the activity is not considered part of the graphical sector.

Source: Network of Eurofound Correspondents, 2023.

Table 55: Features of the graphical sector workforce, 2023

MS	Self-employed	Blue collar / white collar	Skill composition	Labour shortages
AT	Very few	55 % / 45 %	No data	Not mentioned
BE	Large number	No data	No data	Not mentioned
BG	Around 7 %	No data	Mostly highly skilled	Not mentioned
CY	Some	Mostly blue collar	No data	Not mentioned
CZ	13 %	No data	87 % of employees with secondary or higher education	Not mentioned
DE	Few	Mostly white collar	Mostly skilled; 70.1 % are university graduates	Not mentioned
DK	Around 5.6 %	50 % / 50 %	40 % vocational education, 18.2 % managerial work, 45.4 % at basic / shop-floor level	Not mentioned
EE	Few	No data	Professional/vocational qualification is a requirement for employment in the sector	Not mentioned
EL	No data	No data	No data	Not mentioned
ES	25 %	No data	No data	Professional training for the sector needs improving
FI	Some	Both	No data	Not mentioned
FR	No data	58.5 % / 41.5 %	Majority are skilled workers	Relative demand for white-collar workers has increased
HR	No data	Mostly blue collar	No data	Need for ICT experts increasing
HU	No data	Mostly blue collar	No data	Lack of professional workforce
IE	Few	Mostly blue collar	No data	Not mentioned
IT	No data	Mostly blue collar in printing and white collar in publishing	No data	Retraining needed due to digitalisation
LT	Few	No data	No data	Shortage of qualified employees
LU	Yes but no precise data	No data	No data	Not mentioned

MS	Self-employed	Blue collar / white collar	Skill composition	Labour shortages
LV	Very few	No data	Highly skilled	Not mentioned
MT	Around 4 %	69.6 % / 30.4 %	61.4 % skilled manual, 22.7 % highly skilled non-manual	Not mentioned
NL	56.50 %	No data	No data	Not mentioned
PL	No data	No data	Too few well-educated specialists	Lack of trained staff
PT	No data	No data	No data	Not mentioned
RO	Significant number of self-employed	No data	Mix of skilled and low-skilled employees and many freelance professionals	New skills required to fill in new job categories and profiles
SE	No data	Both	No data	Not mentioned
SI	Few	No data	No data	Not mentioned
SK	No data	No data	No data	Not mentioned

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

Table 56: Features hindering the organisation of the workforce in the graphical sector, 2023

MS	Factors
AT	No information was provided.
BE	The large number of small to very small enterprises makes it relatively hard for trade unions to organise employees within the sector. As the minimum threshold of establishing a formal negotiating body (health and safety committee) is 50 employees who are active in an organisation, only about 8 % of employers in the sector reach this threshold.
BG	The dominance of microcompanies makes organising workers difficult.
CY	The decline of activity is hindering the organisation of employees. Newspaper-publishing activities are less affected because of the long-standing organisational tradition and two MEB agreements.
CZ	The sector is small, with small and medium-sized companies. In these companies, organising workers is more difficult than in large ones.
DE	As most employees work in very small companies, unions must put in greater efforts to organise them.
DK	No feature of the workforce has an impact on union membership, which is voluntary.
EE	As most companies in the sector are microcompanies, workers are less likely to want to unionise.
EL	The operation of many microcompanies influences the capacity of trade unions to organise the workers in the sector. Additionally, the absence of sectoral collective agreements does not encourage workers to participate in trade unions. Wages and working conditions are, in practice, regulated by individual contracts and according to minimum wage legislation.
ES	As most workers are employed in small and medium-sized enterprises, it is difficult for trade unions to organise them.
FI	The unionisation rate of blue-collar employees is generally high. There has been some merging of white-collar job profiles with, for instance, sales and marketing, which also means that some professional staff (Ylempi toimihenkilö) are represented through trade unions for economists and similar. The graphical sector trade unions for white-collar employees are thus competing with many other sectoral trade unions, as the job profiles are multifaceted. In the white-collar segment, the dual collective bargaining agreements make the recruitment of members a little more difficult, and many white-collar employees are also non-affiliated. Small companies in the sector, in particular, have lower unionisation rates than large companies, as the unions reach employees in large companies through shop stewards.
FR	The trade unions point out that there is a very large number of very small companies, and it is difficult for them to organise workers in companies with fewer than 10 employees (80 % of the total number of companies).

MS	Factors
HR	The decrease in the number of large companies and the change in the mode of work organisation (workers are more isolated) have made it more difficult for trade unions to organise employees.
HU	The high degree of fragmentation of companies makes it difficult for unions to organise the sector.
IE	Trade union density in Ireland remains quite low, with 28 % of all employees in the economy reporting that they are trade union members.
IT	No information is available.
LT	Employees of small companies are always more difficult to organise. According to the Association of Lithuanian Printing Industries (LISPA), companies compete for employees; therefore, dissatisfied employees do not join unions but choose another employer.
LU	There are no specificities to mention.
LV	The trade union indicated that companies in the sector are paying good salaries and treat employees very well (e.g. bonuses and sports activities). That is why many employees do not see the need to belong to a trade union.
MT	The high share of manual workers makes organisation easier.
NL	There is free riding by workers, as the collective agreement has been extended.
PL	No information is available.
PT	The lack of collective bargaining creates no incentive for trade union membership.
RO	Smaller companies are not organised.
SE	More effort is needed by the trade unions to reach out to small companies, but it is not more difficult to organise these companies.
SI	Microcompanies are predominant, so the sector is very dispersed and there are some challenges in organising workers, but trade union membership in the sector has been stable in the last few years.
SK	According to information from the only trade union of workers in the graphical sector, the situation is not favourable for organising employees in unions. There is no tripartite collective bargaining, higher collective agreements are not negotiated and only enterprise collective agreements are negotiated.

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

Table 57: Means used by trade unions to attract members in the sector in recent years, 2023

MS	Measures
AT	Members are attracted through campaigning activities and the conclusion of collective agreements.
BE	No information was provided.
BG	This is not relevant, as there is no trade union in the sector in Bulgaria.
CY	Trade union officers visit workplaces on a weekly basis.
CZ	There are no such activities; TB is a small trade union with no capacities to organise such activities.
DE	The activities organised are event related, that is, new members are recruited during collective bargaining rounds, rallies and strike activities.
DK	• HK Privat has organised several campaigns in recent years. Like most other Danish unions, membership benefits are advertised, such as insurance and discounts through consumer organisations. Recently, leading up to collective bargaining in spring 2023, the union undertook a membership campaign, allowing new members access to the strike fund of HK Privat after only one month of membership. This campaign took place both online and at workspaces through local union representatives handing out material in Danish, English and Swedish. • 3F organises campaigns through a variety of means (printed, online media and radio spots) to highlight the benefits of being member. 3F is the prime official sponsor to the national football championship the ‘Superligue’ and it offers consumer discounts with ‘Plus Card’ purchase.
EE	This is not relevant, as there is no trade union in the sector in Estonia.
EL	OMTBX organises various activities and communications with members (visits, meetings and conferences). It is also involved in workers’ and social solidarity actions and in organising campaigns.
ES	• The FSC-CCOO has organised and undertaken a union organisation project, affiliation days, a telegram channel and an audiovisual campaign. • ELA – Industria eta Eraikuntza gives personalised attention and training to delegates. In the Gipuzkoa graphics agreement in 2022, four days of strike took place, resulting in company agreements and significantly improving working conditions.
FI	• Teollisuusliitto has taken no active measures in the blue-collar segment. • PRO aims to reach staff through shop stewards.
FR	• Fédération FO Livre attracts members through social media and by having local union offices close to the workplace. • F3C-CFDT organises an on-site union organising day and distributes leaflets at company entrances. • FC-CFTC delivers training.
HR	SGIM, the Trade Union of Croatian Journalists and the Trade Union of Education and Media, in cooperation with the Croatian Journalist Association, strengthened their activities for better working conditions, for the creation of public media policies and for the importance of collective agreements in the media. Furthermore,

MS	Measures
	SGIM is trying to conclude, with the publishing and printing branch of the Croatian Employer Association, a sectoral collective agreement. SGIM is very active in supporting the work of trade union representatives and provides various programmes for their education.
HU	NYDSZ is involved in training, communication and member recruitment.
IE	No information was provided.
IT	No information was provided.
LT	This is not relevant, as there is no trade union in the sector in Lithuania.
LU	There are no specific actions taken by the trade unions in Luxembourg.
LV	LPNA cooperates with companies and with employer organisations.
MT	Shop stewards in companies approach new recruits and advise them about union membership. The trade union also uses social media to promote its activities in general. Membership is on a voluntary basis.
NL	No information was provided.
PL	No information was provided.
PT	• Sindetelco organises regular visits to companies in the north and irregular visits to those in the south. • In 2022, Sinttav distributed leaflets to workers at INCM on the 50th anniversary of the company.
RO	No information provided.
SE	• GS organises workers in workplaces, often focusing on the most pressing matters; collective agreements are concluded when there are negotiation rounds, and the focus is on the working environment in other periods. • Ledarna and Pappers conduct workplace visits and contact management staff to try to attract new members through existing members.
SI	Pergam offers its members different solutions for the sector.
SK	No information provided.

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

Table 58: Company features that hinder the organisation of companies in employer organisations, 2023

MS	Factors
AT	There are no hindering factors. There are mandatory employer organisations organising all companies in the sector and a voluntary organisation that has around 200 members.
BE	There is no indication that the sector is harder or easier than other sectors to organise.
BG	There are no issues.
CY	The decline of the industry makes organisation more difficult. There are, however, two employer organisations in the sector.
CZ	Small and medium-sized companies are more difficult to organise for financial reasons and a lack of personnel.
DE	Small companies are especially hard to organise.
DK	The specificities of the companies in the sector do not affect the capacity of employer organisations.
EE	Companies see no reason to organise, as membership in the employer organisation will not protect companies from sectoral or national economic developments.
EL	A large number of microbusinesses and the absence of large and medium-sized companies hinders the organisation of employers.
ES	Sectoral specificities do not explain difficulties in organising employers.
FI	Employer organisations have not been able to follow the modernisation and widening of activities of the sector. The activities related to the graphical sector do not appear to be the main activities and thus companies may belong to an employer organisation of a different sector.
FR	As the sector is made up of many very small companies, it is not always easy to get them to join an employer organisation. However, the support provided by employer organisations encourages them to join, and UNIIC stresses that it has no problem with affiliating members.
HR	Microcompanies and small and medium-sized companies have no interest in belonging to an employer organisation or in bargaining collectively.
HU	The decrease in the size of companies has made it more difficult to organise them.
IE	The large number of small firms in the sector makes it difficult to organise and, as a result, many do not belong to an employer organisation.
IT	No information is available.
LT	It is more difficult to organise smaller companies.
LU	No problems as a single employer organisation exists in the sector (AMIL).
LV	The sector does not differ from other sectors; larger companies are usually more willing to be organised.
MT	Sectoral specificities do not explain difficulties in organising employers.
NL	Size of companies makes organisation more difficult.
PL	No information is available.
PT	The small size of companies may have a negative impact on their organisation in employer organisations, but it seems that the long-lasting standstill in collective bargaining is a much stronger negative factor. The employer organisation Apigraf does not seem to play a significant role in industrial relations in the sector and is focused on its role as a business association.

MS	Factors
RO	Small company size hinders the organisation of employers because of a lack of resources and interest, the diversity of activities, the highly competitive environment and the view that belonging to an employer organisation is a threat to companies' competitive advantage.
SE	Self-employed workers in newer forms of the graphical sector work are a challenge.
SI	Sectoral specificities do not explain the difficulties in organising employers.
SK	As collective bargaining takes place only at the enterprise level there is not much interest in belonging to an employer organisation.

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

Table 59: Scope of membership domains of trade unions not represented in the ESSDC, 2023

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services	Binding of printed material	Other printing	Printing of commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Number of non-represented trade unions	19	16	19	15	12	15	14	14	8	11	10	10	8	10	8	6	13
% of all sectoral trade unions ([70])	40	36	40	38	30	37	35	37	33	33	31	30	28	30	29	24	38
Number of Member States	15	13	15	13	10	12	11	11	8	10	9	10	7	10	8	7	10

Source: Network of Eurofound Correspondents, 2023.

([70]) Share calculated using the number of trade unions reporting members in the sector as listed in Table 18.

Table 60: Trade union coverage by workforce categories and company size groups of non-represented sectoral trade unions, 2023

	Company size			Geographical coverage		Type of workers organised				Other sectors in which trade unions also have members											
	Large	Small	Equally large and small	Entire Member State	Regional substructure	Blue collar	White collar	Management	Self-employed	Paper	Audiovisual	Commerce	Logistics	Transport	Postal and courier	Graphic design advertising	Photographers	Production of signage and luminous signs	Video game production	Production of packaging (including corrugated)	Production of other packaging
Number of trade unions	5	1	9	23	10	20	20	12	4	11	8	5	7	7	7	9	5	5	3	11	8
% of all trade unions	50	33	35	44	40	41	46	44	40	38	32	26	32	37	32	33	29	29	20	37	35
Number of Member States	11	11	11	1	3	2	2	2	2	5	5	5	5	5	5	5	5	5	5	5	5

Source: Network of Eurofound Correspondents, 2023.

Table 61: Scope of membership domains of sectoral employer organisations not affiliated with Intergraf, 2023

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services (typesetting and electronic make-up)	Binding of printed material	Other printing	Other commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Number of non-represented employer organisations	18	17	18	16	18	16	18	16	6	10	10	12	8	11	5	3	9
Total number of employer organisations (independent of affiliation)	32	32	33	31	33	32	30	30	17	23	23	24	18	25	10	7	19
% of the non-represented employer organisations among all employer organisations in the sector	56	53	55	52	55	50	60	53	35	44	44	50	44	44	50	43	47
Number of non-represented employer organisations not active in the sector	11	12	11	13	11	11	9	13	23	19	19	17	19	16	24	24	18

	Printing of newspapers	Printing of books	Printing of magazines	Printing on packaging	Pre-press and pre-media services (typesetting and electronic make-up)	Binding of printed material	Other printing	Other commercial printing	Printing on wallpaper	Printing on other surfaces	Security printing	Labels	Production of stationery products	Large-format printing	Printed electronics	Reproduction of recorded media	Paper and board converting
Number of non-represented employer organisations for which no information on activity in the sector is available	2	2	2	2	2	4	4	2	2	2	2	2	4	4	2	4	4

Note: No data on the sector coverage of the Irish Printing Federation.

Source: Network of Eurofound Correspondents, 2023.

Table 62: List of national trade unions identified as representing workers in the graphical sector

MS	Trade union acronym	Name in original language	Name in English
AT	GPA	Gewerkschaft der Privatangestellten	Union of Private Sector Employees
BE	ACV-CSC BIE	ACV-CSC Bouw, Industrie en Energie	ACV-CSC Construction, Industry and Energy
BE	ABVV-FGTB BBTK-SETCa	ABVV-FGTB FGTB Bond voor Bedienden, Technici en Kaderleden	ABVV-FGTB Federation for White-collar Workers, Technicians and Professional and Managerial Staff
BE	ACLVB-CGSLB	Algemene Centrale der Liberale Vakbonden in België	General Federation of Liberal Trade Unions in Belgium
BE	ACV-CSC Puls	ACV-CSC Puls	ACV-CSC Puls
BE	ACV-CSC CNE	ACV-CSC Centrale Nationale des Employés	ACV-CSC National Federation of Employees
CY	ΣΕΒΕΤΤΥΚ	Συντεχνία Εργατοϋπαλλήλων Βιομηχανίας, Εμπορίου, Τύπου – Τυπογραφείων και Γενικών Υπηρεσιών Κύπρου	Cyprus Industry, Commerce and Press-printing Houses and General Services Trade Union
CY	OBIEK-SEK	Ομοσπονδία Βιομηχανικών Εργαζομένων	Federation of Industrial Workers
CZ	TB	Typografická Beseda – odborový svaz zaměstnanců polygrafické výroby v Čechách, na Moravě a v Slezku	Typographical Association – Trade union of Employees of Printing Production in the Bohemia, Moravia and Silesia
DE	Ver.di	Vereinte Dienstleistungsgewerkschaft	United Services Union
DK	HK Privat	Handels- og Kontorfunktionærernes Forbund Privat	Union of Commercial and Clerical Employees in Denmark – Private
DK	3F	Fagligt Fælles Forbund	United Federation of Danish Workers
EL	OMTBX	Ομοσπονδία Μισθωτών Τύπου και Βιομηχανίας Χάρτου	Federation of Press and Paper Industry Employees
ES	FSC-CCOO	Federación de Servicios a la Ciudadanía de Comisiones	Federation of Services to the Citizenship of Workers
ES	CCOO-Industria	Federación de Industria de Comisiones Obreras	Federation of Industry of Workers
ES	UGT-SP	Federación de Servicios Públicos de la Unión General de Trabajadores	Federation of Public Services of the General Union of Workers
ES	UGT-FICA	Federación de Industria, Construcción y Agro de la Unión General de Trabajadoras y Trabajadores	Federation of Industry, Construction and Agriculture of the General Union of Workers
ES	UGT-FeSMC	Federación de Servicios, Movilidad y Consumo de la Unión General de Trabajadores	Federation of Services, Mobility and Consumption of the General Union of Workers
ES	ELA – Industria eta Eraikuntza	Eusko Langileen Alkartasuna – Industria eta Eraikuntza	Basque Workers' Solidarity – Industry and Construction
ES	FI-USO	Federación de Industria de la Unión Sindical Obrera	Federation of Industry of Workers' Commissions

ES	LAB	Langile Abertzaleen Latzordeak	Nationalist Workers' Committees
FI	Teollisuusliitto	Teollisuusliitto	Industrial Union
FI	PRO	Ammattiliitto PRO	Trade Union PRO
FI	SJL	Suomen Journalistiliitto	Union of Journalists in Finland
FR	Filpac CGT	Fédération des travailleurs des industries du livre, du papier et de la communication – Confédération Générale du Travail	Federation of Workers in the Book, Paper and Communication Industries – CGT
FR	Fédération FO Livre	Fédération du livre Force ouvrière	Book Federation – Force Ouvrière
FR	F3C-CFDT	Fédération communication, conseil, culture CFDT	Communication, Consultancy, Culture Federation CFDT
FR	FC-CFTC	Fédération de la Communication CFTC	Communication Federation of the CFTC
FR	IP-CFE-CGC	Syndicat national du personnel CFE-CGC Industries polygraphiques	CFE-CGC National Union of Polygraphic Industry Staff
HR	SGIM	Sindikat grafičara i medija	Trade Union of Graphic and Media Workers
HU	NYDSZ	Nyomdaipari Dolgozók Szakszervezete	Trade Union of Printing Workers
IE	SIPTU	Services, Industrial, Professional and Technical Union	Services, Industrial, Professional and Technical Union
IE	Unite	Unite the Union	Unite the Union
IT	SLC-CGIL	Sindacato Lavoratori Comunicazione in Confederazione Generale Italiana del Lavoro	Communication Workers Union in General Confederation of Italian Workers
IT	Fistel-CISL	Federazione Sindacale Informazione Spettacolo e Telecomunicazione in Confederazione Italiana Sindacati Lavoratori	Federation of Trade Unions Information Entertainment and Telecommunication in Italian Confederation of Workers' Union
IT	Uilcom-UIL	Unione Italiana Lavoratori della Comunicazione	Italian Labour Union of Communication
LU	LCGB-Services	Lëtzebuerger Chrëschtleche Gewerkschaftsbond	Luxembourg Confederation of Christian Trade Unions
LU	OGB-L – imprimerie, médias, culture, FLTL	OGB-L imprimerie, médias, culture – Fédération Luxembourgeoise des Travailleurs du Livre	OGB-L printing, media and culture – Luxembourg Federation of Book Workers
LV	LKDAF	Latvijas Kultūras darbinieku arodbiedrība	Trade Union of Culture Sector
LV	LPNA	Latvijas poligrāfijas nozares arodbiedrība	Latvian Graphical Industry Trade Union
MT	GWU	General Workers' Union	General Workers' Union
NL	FNV Media en Cultuur	Federatie Nederlandse Vakbeweging Media en Cultuur	Federation of Dutch Trade Unions – Media and Culture
NL	De Unie	De Unie	The Union

NL	CNV	Christelijk Nationaal Vakverbond	Christian National Trade Union
PL	ZPP	Związek Zawodowy Poligrafów	Polygraphers Trade Union
PT	Fiequimetal	Federação Intersindical das Indústrias Metalúrgica, Química, Farmacêutica, Eléctrica, Energia e Minas	Interunion Federation of Metal, Chemical, Electric, Electrical, Pharmaceutical, Pulp, Paper, Printing, Press, Energy and Mining Industries
PT	Sindetelco	Sindicato Democrático dos Trabalhadores dos Correios, Telecomunicações, Media e Serviços	Democratic Union of Postal, Telecommunications, Media and Services Workers
PT	Sinttav	Sindicato Nacional dos Trabalhadores das Telecomunicações e Audiovisual	National Trade Union of Telecommunications and Audiovisual Workers
PT	SIMA	Sindicato das Indústrias Metalúrgicas e Afins	Union of Metallurgical and Allied Industries
RO	USTR	Uniunea Sindicatelor Tipografilor din România	Union of Typographers’ Unions in Romania
SE	GS	Facket för skogs-, trä- och grafisk bransch	The Swedish Union of Forestry, Wood and Graphical Workers
SE	Unionen	Unionen	Unionen
SE	Ledarna	Ledarna	The Leaders
SE	Pappers	Svenska Pappersindustriarbetareförbundet	Swedish Paper Workers’ Union
SE	SI	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
SE	SEKO	Service och kommunikationsfacket	The Swedish Service and Communications Union
SI	SGDS	Sindikat grafične dejavnosti Slovenije	Trade Union of Graphical Activity of Slovenia
SI	Pergam	Konfederacija sindikatov Slovenije Pergam	Trade Union Confederation Pergam
SK	SOZPP	Slovenský odborový zväz polygrafie	Slovak Trade Union of Employees in the Graphical Sector

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

Table 63: List of national employer organisations representing the companies in the graphical sector

MS	Employer organisation acronym	Name in original language	Name in English
AT	VZÖ	Verein Österreichischer Zeitungen	Association of Austrian Newspapers
AT	Propak	Fachverband der Papierverarbeitenden Industrie Österreichs	Association of the Paper-processing Industry in Austria
AT	BIK	Bundesinnung Kunsthandwerke	Federal Guild of Artisan Crafts
AT	VDMT	Verein Druck und Medientechnik	Association of Printing and Media Technology Enterprises
AT	FVD	Fachverband Druck	Austrian Printing Association
BE	Febelgra	Federatie van de Belgische Grafische Industrie	Federation of the Belgian Graphical Sector
BE	BNM	Belgian News Media	Belgian News Media
BG	UPIB	Съюз на печатарската индустрия в България	Printing Industry Union of Bulgaria
CY	CMPA	Παγκύπριος Σύνδεσμος Εργοδοτών Τυπογράφων	Cyprus Master Printers Association
CZ	SPP	Svaz polygrafických podnikatelů	Union of Printing Industry Businessmen and Entrepreneurs
DE	bvdm	Bundesverband Druck und Medien	Federal Association of Printing and Media
DK	Grakom	Grafisk Kommunikation & Medier	Danish Association for Graphic Communication and Media
DK	DMA	Danske Medier Arbejdsgiver	Danish Newspapers and Media Employers
EE	ETPL	Eesti Trüki- ja Pakenditööstuse Liit	Estonian Printing and Packaging Industry Association
ES	Feigraf	Federación Empresarial de Industrias Gráficas de España	Business Federation of Graphic Industries of Spain
ES	AFCO	Asociación Española de Fabricantes de Cartón Ondulado	Spanish Association of Corrugated Cardboard Manufacturers
ES	AME	Asociación Metalgráfica Española	Spanish Metallographic Association
ES	ADEGI	Asociación de Empresas de Gipuzkoa	Association of Companies of Gipuzkoa
ES	FGEE	Federación Gremio de Editores de España	Federation Guild of Editors of Spain
FI	Medialiitto	Medialiitto	Finnish Media Federation
FI	GT	Graafinen teollisuus	Federation of the Printing Industry in Finland
FR	GMI	Groupement des Métiers de l'Imprimerie	Association of the Printing Trade
FR	UNIIC	Union des Industries des Cartons et des Imprimés	Union of Cardboard and Printing Industries
HR	HUP – UGN	Hravtska udruga poslodavaca – Udruga grafičara i nakladnika	Croatian Employer Association – Publishing and Printing Association Hrvatska

HU	Fedprint	Nyomda- és Papíripari Szövetség	Federation of Printing and Paper Industry
IE	Irish Printing Federation	Irish Printing Federation	Irish Printing Federation
IT	Assografici	Associazione Nazionale Italiana Industrie Grafiche Cartotecniche Trasformatrici	Italian Printing and Paper Converting Industries Association
IT	AIE	Associazione Italiana Editori	Italian Publishers Association
IT	ANES	Associazione Nazionale Editoria di Settore	National Publishing Association
LT	LISPA	Lietuvos spaustuvininkų asociacija	Association of Lithuanian Printing Industries
LU	AMIL	L'Association des Maîtres Imprimeurs du Grand-Duché de Luxembourg	Association of Master Printers of the Grand Duchy of Luxembourg
LV	LPUA	Latvijas Poligrāfijas uzņēmumu asociācija	Association of Latvian Printing Companies
MT	MEA	Malta Employer Association	Malta Employer Association
MT	SME Chamber	SME Chamber	SME Chamber
NL	KVGO	Het Koninklijk Verbond van Grafische Ondernemingen	Royal Association of Graphic Enterprises
NL	Vereniging Repro Nederland	Branchevereniging van Reprografische Ondernemingen	Employer Organisation of Reprographic Businesses
PL	Flekso	Polska Izba Fleksograficzna	Polish Chamber of Flexographers
PL	PIO	Polska Izba Opakowań	Polish Packaging Chamber
PL	PASDP	Polskie Stowarzyszenie Sitodruku i Druku Cyfrowego	Polish Association of Screen and Digital Printing
PL	Polish Chamber of Printing	Polish Chamber of Printing	Polish Chamber of Printing
PL	Polish Papermakers Association	Polish Papermakers Association	Polish Papermakers Association
PT	Apigraf	Associação Portuguesa das Indústrias Gráficas e Transformadoras do Papel	Portuguese Association of Printing and Paper Industries
RO	ATT	Asociația Tipografilor din Transilvania	Transylvania Printers Association
SE	GF	Grafiska Företagen	Swedish Graphic Industries Federation
SE	Almega	Almega – Medieföretagen	Almega – Media Industries Employer Association
SI	GZS-MZ	Gospodarska zbornica Slovenije – Medijska zbornica	Chamber of Commerce and Industry of Slovenia – Chamber of Media Providers
SI	ZDS	Združenje delodajalcev Slovenije – Sekcija za les in papir	Association of Employers of Slovenia – Wood Section

SK	ZPnS.sk	Zväz polygrafie na Slovensku	Printing Industry Association of the Slovak Republic

Note: MS, Member State.

Source: Network of Eurofound Correspondents, 2023.

Table 64: Correspondents who contributed to this study

Member State	Correspondent	Organisation
AT	Georg Adam	Working Life Research Centre
BE	Dries Van Herreweghe	HIVA – Research Institute for Work and Society, KU Leuven
BG	Gabriela Yordanova	Institute of Philosophy and Sociology, Bulgarian Academy of Sciences
CY	Alexandros Perdikes	Cyprus Labour Institute – Pancyprian Federation of Labour
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	German Economic Institute
	Thilo Janssen	Institute of Economic and Social Research, Hans Böckler Foundation
DK	Carsten Jørgensen David Lausen	Employment Relations Research Centre (FAOS), University of Copenhagen
EE	Ingel Kadarik Miriam Lehari	Praxis Centre for Policy Studies
EL	Penny Georgiadou	Institute of Labour of the Greek General Confederation of Labour (INE GSEE)
ES	Pablo Sanz de Miguel	University of Zaragoza
FI	Vera Lindström	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejaković	Faculty of Economics, Business and Tourism, University of Split
	Irena Klemenčić	Faculty of Law, University of Zagreb
HU	Szilvia Borbély	Kopint-Tárki Institute for Economic Research
IE	Rosanna Angel	IRN Publishing
IT	Alessandro Smilari Silvio Bologna	Fondazione Giacomo Brodolini
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research
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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the graphical industry. Their relative representativeness legitimises their right to be consulted 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 sector. This study identifies UNI Europa Graphical and Packaging – representing trade unions – and the European Federation for Print and Digital Communication (Intergraf) – representing employers – as the most representative European-level social partner organisations in the graphical industry.

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