

EIRO-Comparative Studies

Beitrag aus dem

Institut der deutschen Wirtschaft Köln

zum

European Industrial Relations Observatory (EIRO)

Developments in social partner organisations: employer organisations

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The case of Germany

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Employer organisations play a decisive role in a variety of fields, such as collective wage bargaining, developments in legislation and the formation of economic and social policy. In particular, national peak employer organisations shape a broad range of issues via their direct and indirect influence on consultative processes at the national and international level. While the role of peak organisations has not considerably changed in recent years, new developments are to be observed at the sectoral level. Employer organisations in certain sectors have endeavoured to enhance their influence by reorganising their structures.

1 National ‘peak’ employer organisations

1.1 List all the national ‘peak’ employer organisations

In Germany, four organisations are usually considered as peak business organisations in Germany, i.e. the German Confederation of Employers’ Associations (Bundesvereinigung der Deutschen Arbeitgeberverbände, BDA), the German Confederation of Skilled Crafts (Zentralverband des Deutschen Handwerks, ZDH), the German Chambers of Industry and Commerce (Deutscher Industrie- und Handelskammertag, DIHK) and the Federation of German Industries (Bundesverband der Deutschen Industrie, BDI). Whilst all four of them are often involved in bi-/ tripartite or multilateral consultations on labour market and economic issues, this study only covers BDA and ZDH as peaks organisations which claim to coordinate the collective bargaining interests of their members.

The BDA is the leading employer confederation for the private sector. It claims to represent over 1,000 employer associations from industry, the skilled crafts, trade and services. It should be noted that most of the direct BDA-members are usually made up of lower-level organisations. Only a few BDA-members directly organise companies themselves. The peak association states that around two million companies of all sizes, employing 80% of the workers in Germany, are affiliated to its members.

The BDA deals with a broad range of issues. In addition to covering the labour market, labour law and wage policy, it takes a critical interest in education and training topics and European and international social policy as well, developing its own positions on all these issues and also advising on legal matters. Finally, the BDA represents the common interests of its members in dealings with governmental bodies, trade unions, the general public, etc.

ZDH on the other hand acts as the umbrella organisation for the multifaceted crafts sector. The crafts sector is not to be considered as a single sector in terms of NACE classification. It comprises of a multitude of businesses all joined under the roof of ZDH, e.g. the building and interior finishes trades, electrical and metalworking trades, woodcrafts, textiles, health care trades or graphic design.

Its umbrella organisation has to be considered a 'dual organisation', i.e. representing labour market/ industrial relations interests as well as other business interests. The organisation consists of three pillars:

1. The German Association of Skilled Crafts Confederations (Unternehmerverband Deutsches Handwerk, UDH). The UDH consists of 38 confederations of guilds and 8 other professional organisations. It should be noted that UDH holds dual membership in ZDH and BDA. In the ZDH structure, UDH acts as the umbrella association for the mentioned confederations which also take over the role of employer organisations in terms of collective bargaining in the crafts sector. Though ZDH/ UDH are not directly involved in collective bargaining, they nonetheless inform their members on collective bargaining issues and developments, coordinate their interests and initiate exchanges of experience.

2. The German Confederation of Chambers of Skilled Crafts (Deutscher Handwerkskammertag, DHKT) consists of 54 chambers of skilled crafts. Please note that the German chamber system is a unique form of self-governance. All businesses are legally bound to become a member of a crafts chamber or of a chamber of industry of commerce outside the crafts sector. Exempt from this regulation are only agricultural businesses. These chambers have been assigned several functions by law. As laid down in the Crafts and Trade Code (Handwerksordnung), the chambers of skilled crafts keep the crafts register, hold examinations, regulate vocational training and so on. The chambers represent the interests of the crafts sector towards the public administration or other political institutions.

3. Other economic and scientific organisations.

According to ZDH, 967,201 crafts or crafts-related enterprises employing 4,806,000 employees were registered with the chambers of skilled crafts in 2008. This compares to 846,600 enterprises employing 5,100,000 employees in 2003. The number of establishments rose after the amendment of the Crafts and Trade Code in 2003.

1.2 Change in the structure of national 'peak' employer organisations

The BDA reports that its membership has increased since 2003 and now numbers 71 (including 14 regional associations). Employer organisations are concerned to improve their services to meet the needs of their member companies. Both this aim and economic changes are reflected in several recent mergers between BDA's member organisations (see 2.2).

After the amendments to the Crafts and Trade Code in 2003, the ZDH reported a rising number of sole proprietors and enterprises with only few employees among its members. This development has especially affected trades for which no licence is necessary, e.g. goldsmiths, weavers and violin makers. In contrast to larger, longer established enterprises, newly founded businesses in these trades usually had greater reservations about becoming members of employer organisations.

1.3 Collective bargaining role of each peak organisation

The BDA is not a party to collective bargaining negotiations, which are the preserve of its members. However, the peak organisation coordinates the interests of its affiliated members by offering consultancy services and providing information. Focussing its work especially on pay policy, the BDA promotes the continued modernisation of sectoral pay agreements. Furthermore, collective agreements can be declared as generally binding under certain circumstances by an imposing order of the federal minister of labour (Allgemeinverbindlichkeitserklärung). Such decisions are taken in consultation with a parity committee for the extension of collective agreements, made up of employer and employee representatives. BDA acts for the employer side in this committee.

Similarly, through its member UDH, the ZDH coordinates the collective bargaining interests of its affiliated members in the skilled crafts sectors. The organisation keeps members informed on current issues, but is not directly involved in collective bargaining. In this regard, the BDA's and ZDH's roles have not materially changed since 2003.

1.4 Involvement in tripartite and/or bipartite consultations

Generally speaking, peak employer organisations pursue their interests in consultative processes at the national or international level. The topics naturally include labour market, industrial relations and economic issues.

A variety of social welfare matters, educational measures (especially relating to continuous or vocational training) and legal issues are also of interest, as is reflected in the representation of peak organisations in consultation procedures.

At the international level, the BDA represents German business interests at BUSINESSEUROPE. Via BUSINESSEUROPE, the BDA takes part in the European social dialogue. Further affiliations of the BDA include: the Governing Body of the International Labour Organisation (ILO), the International Organisation of Employers (IOE) as well as the Business and Industry Advisory Committee to the OECD (BIAC). Via BIAC, the BDA is involved in OECD consultancy procedures and regularly heard at the G-8 meetings of ministers of social affairs.

At the national level, the BDA participates in a variety of committees, bodies and working groups. These include:

- the governing bodies of the three national social security agencies, i.e. statutory unemployment, pension and health insurance;
- several committees of the Federal Employment Agency (Bundesagentur für Arbeit, BA), e.g. on labour market issues, on placement services or organisation and statistics;
- the committee for the extension of collective agreements
- the federal consortium called SchuleWirtschaft (SchoolBusiness) which promotes cooperation between schools and business.

The BDA's involvement in tri- or bipartite consultation procedures is highly diverse and covers a broad range of topics. Besides the affiliations mentioned above, the BDA also participates in the annual meeting of the four business umbrella organisations in Germany (*Spitzengespräch der deutschen Wirtschaft*).

At the international level, the ZDH and the UDH are members of the European Association of Crafts, Small and Medium Sized Enterprises (UEAPME). The ZDH reports that it is regularly consulted by European institutions as well as the lower (*Bundestag*) and upper (*Bundesrat*) houses at the national level on legal matters and political initiatives concerning the skilled crafts.

At the national level, the ZDH regularly takes part in consultations with the other umbrella organisations in Germany, i.e. the BDA, BDI and DIHK. In addition, the ZDH is part of a working group on SMEs, the

Arbeitsgemeinschaft Mittelstand, AG Mittelstand, whose members include the following associations with which the ZDH is in close contact:

- Federal Association of German Cooperative Banks (Bundesverband der Deutschen Volksbanken und Raiffeisenbanken, BVR)
- Federation of German Wholesale and Foreign Trade (Bundesverband des Deutschen Groß- und Außenhandels, BGA)
- German Hotels and Restaurants Association (Deutscher Hotel- und Gaststättenverband, DEHOGA)
- DIHK
- German Association of Agricultural and Food Industry Cooperatives (Deutscher Raiffeisenverband, DRV)
- German Savings Bank Association (Deutscher Sparkassen- und Giroverband, DSGV)
- German Retail Association (Hauptverband des Deutschen Einzelhandels, HDE)
- German Federation of Buying and Marketing Groups (Zentralverband Gewerblicher Verbundgruppen, ZGV)

The working group represents the common interests of its members. It calls for economic structures and a general business climate which will support and encourage SMEs in their striving for innovation and economic competitiveness and thus also promote employment.

1.5 Role of each of the peak organisations listed in 1.1, other than in the areas referred to in 1.3 and 1.4

The BDA develops its own positions and analyses on all the issues outlined in section 1.1. It offers legal advice to its members and takes part in the development of relevant legislation. The ZDH similarly informs its members on all relevant political matters at the national, European and international levels. BDA and ZDH represent the shared interests of their members in consultation procedures or public debate. In this respect, the role of the peak organisations has not materially changed since 2003.

1.6 Evidence of change since 2003 in the composition of the leaderships

The BDA and ZDH both report that no structural changes have taken place in the composition of their leadership since 2003.

2 Sectoral employer organisations

2.1 Summary of the sectoral structure of employer representation in your country

The current membership of the BDA comprises 71 organisations covering all industries, the skilled crafts and services. BDA members are (lower-level) employer organisations from the private sector. Members include sectoral as well as the 14 cross-sectoral associations from the regional level of the federal states (*Länder*). It should be noted that the lower-level employer associations are usually affiliated to both their cross-sectoral association at the regional level and their sectoral association. For example, the regional employer association for the metal and electrical industry in North Rhine-Westphalia (Metall NRW) is affiliated to:

- its sectoral peak organisation, i.e. the Employers' Associations for the Metal and Electrical Industry (Arbeitgeberverbände der Metall- und Elektroindustrie, Gesamtmetall); and
- the cross-sectoral regional association of employer organisations in North Rhine-Westphalia (Landesvereinigigung der Arbeitgeberverbände in Nordrhein-Westfalen, Arbeitgeber NRW).

Similarly, the UDH is made up of lower-level associations plus eight professional associations. Members of UDH are the 38 regional confederations of guilds. They act as employer associations in the crafts sector, i.e. negotiate wages. At the bottom of the hierarchy stands the local guild which can be set up by self-employed craftsmen. Membership in these guilds is voluntary.

2.2 Changes in the structure of sectoral employer organisations

Due to the sheer number of employer organisations existing in Germany, this report focusses on the most recent developments concerning the structure of employer organisations in different sectors:

1. A merger occurred on 1 January 2006 when the industry association of enterprises operating in salt production and the corresponding employers' association founded a combined industry and employers' association for this particular part of the mining sector. The resulting organisation is called *Verband der Kali- und Salzindustrie*. In view of this new foundation, the remaining members of the former industry association in the mining sector known as *Wirtschaftsvereinigung Bergbau* also set up a new association called *Vereinigung Rohstoff und Bergbau* (VRB). VRB cooperates with BDA and BDI.
2. In 2007, regional trade associations in the motor vehicle repair sector, such as in Baden-Württemberg in southwest Germany and in Bavaria in southern Germany, cancelled existing collective agreements and formally renounced their collective bargaining competence. In doing so, they paved the way for the establishment of new employer organisations (*Tarifgemeinschaften*) to take over the collective bargaining negotiations in the sector (see 2.4).
3. In 2007, two new employers' associations emerged in the postal services sector. The Postal Services Employers' Association (Arbeitgeberverband Postdienste, AGV Postdienste) is a successor of the *Sozialpolitische Arbeitsgemeinschaft KEP- und Postdienste EV* (Arge KEP), which was established in 1998. It represents, in particular, the market leader, Deutsche Post AG, and other companies which previously belonged to the former state-owned Federal Postal Service (*Deutsche Bundespost*). The Employers' Association of the New Postal and Delivery Services (Arbeitgeberverband Neue Brief- und Zustelldienste, AGV NBZ) was founded in September 2007 and largely consists of the competitors of Deutsche Post. Both associations are affiliated to the BDA.
4. Several regional associations in the metal working and electrical industry merged in 2007. The association for the states (*Länder*) of Schleswig-Holstein, Hamburg and Mecklenburg-Western Pomerania called *Nordmetall* merged with the regional association of the north-western state of Lower Saxony, formally known as *Nord-West-Metall*, and the regional association for the city-state of Bremen, called *Metall Unterweser*. The new organisation kept the name Nordmetall. Nordmetall is affiliated to the sectoral peak organisation Gesamtmetall which is a BDA-member.

5. On 29 March 2008, the two regional associations in the construction industry in Mecklenburg-West Pomerania merged to form the Bauverband Mecklenburg Vorpommern. Latter is affiliated to the Federal Association of the German Construction Industry (Hauptverband der deutschen Bauindustrie, HDB) which is a member of BDA.

Since this study is also interested in CEEP members, i.e. organisations representing providers of 'services of general interest' the following developments are of interest for the electricity, water and gas supply sector as well as for sewage and refuse disposal: in May 2003, the joint collective bargaining association for German public sector employers collapsed after more than 40 years. The joint bargaining association (Tarifgemeinschaft) for the public sector united public employers at the federal, state and municipal levels. Since then, the Employers' Association of German *Länder* (Tarifgemeinschaft deutscher Länder, TdL), representing public employers at the state level, and the Municipal Employers' Association (Vereinigung kommunaler Arbeitgeberverbände, VKA) have acted independently in collective bargaining. VKA is part of the German section of CEEP.

2.3 Collective bargaining role of national sectoral employer organisations

First of all, it should be noted that the number of companies bound by collective agreements has declined in recent years. As indicated by Ellguth and Kohaut, around 32% of all establishments and around 53% of employees were covered by a sectoral-level collective agreement in 2007. It should be noted that another quarter of the other establishments (covering a further 20% of employees), though not technically bound by branch-level collective agreements, nonetheless used them as guidelines.

In 2003, the collective bargaining coverage was higher: around 39% of all establishments, covering 59% of employees, were bound by a sectoral-level agreement. As in 2007, around another quarter of the unbound establishments (covering another 17% of employees) reported using the sectoral-level agreement as a guideline.

However, as Table 1 clearly indicates, the number of establishments covered by collective bargaining varies greatly between different industrial sectors. Other factors influencing collective bargaining coverage are the size of the establishment, the existence of a works

council and the location of the establishment. Eastern German establishments are less often covered by a sectoral-level collective agreement.

Coverage of establishments by collective bargaining by sector in 2007						
Sector	% of companies with sectoral-level collective agreement		% of companies with company-level collective agreement		% of companies with no collective agreement (of which using collective agreement as a guideline)	
	West	East	West	East	West	East
Agriculture and others	40	8	*	*	60 (37)	92 (38)
Mining and energy	55	38	4	15	42 (56)	47 (67)
Raw materials (capital goods)	42	18	4	5	54 (51)	77 (40)
Investment goods	30	17	3	6	67 (55)	78 (49)
Consumer goods	46	24	3	3	51 (46)	73 (47)
Construction	61	38	1	4	38 (56)	58 (59)
Retail and repair	34	15	2	4	63 (44)	81 (40)
Transportation and communication	34	15	4	6	62 (46)	80 (42)
Finance	42	32	4	*	54 (45)	66 (27)
Business services	13	14	1	4	85 (29)	83 (28)
Other services	36	16	3	5	61 (43)	79 (44)
Non-profit sector	40	20	8	9	52 (42)	72 (33)
Public administration	85	85	7	5	8 (79)	11 (51)
Total	36	20	3	4	62 (42)	76 (41)

**Not shown as sample was too small.*

Source: IAB Establishment Panel 2007

In Germany, the regional branch-level collective agreement prevails. Sectoral peak employer organisations usually coordinate the collective bargaining strategies of their members, e.g. by giving recommendations. Collective bargaining negotiations are held by their members. Pilot

agreements of one bargaining region might however be adopted in other collective bargaining regions, as was for example the case in the 2008 collective bargaining round in the metal and electrical industry. Apart from collective bargaining, sectoral employer associations moreover offer their members legal advice and information services, draw up joint positions on issues of relevance to the sector and represent the interests of their members as explained above.

2.4 Change in the collective bargaining role of national sectoral employer organisations

The data on collective bargaining coverage given above suggests that establishments increasingly prefer a system of wage determination that allows for a higher degree of flexibility. Since 2003, employer associations have indeed changed their organisational patterns to adapt to their members' calls for greater flexibility.

In this regard, the introduction of membership status without a binding commitment to collective agreements (the so-called *Ohne Tarifbindung Status*, *OT-Status*) must be considered an important development. Gesamtmetall, for example, introduced the OT-Status on 31 January 2005 and thus now offers two different kinds of membership: with and without a binding commitment to collective agreements.

In addition to these new membership options, the use of opening clauses in collective agreements is another way to allow for greater flexibility. In a joint study, the Institute for Employment Research (Institut für Arbeitsmarkt- und Berufsforschung, IAB) and the the Friedrich-Alexander University of Erlangen-Nürnberg (Friedrich-Alexander Universität Erlangen-Nürnberg, FAU) examined the use, impact and distribution of such opening clauses. The study's results indicate that 13% of the companies surveyed had an opening clause in their collective agreement in 2005. Of these establishments, 52% made use of this clause in the same year. Opening clauses that allow deviation from collectively agreed standards (providing that certain conditions are fulfilled) were often used to make working time adjustments. Only a minority of companies used opening clauses for the reduction of wages and this was more widespread among companies in eastern Germany.

Special attention should be paid to further developments in the skilled crafts sector, which, in contrast to other industries, is regulated by the Crafts and Trade Code. This document does not allow for an employer's membership of a regional guild (*Landesinnung*) without a binding

commitment to collective agreements concluded by the association. Members of these guilds have therefore automatically been covered by collective agreements, regardless of the unionisation level in their workforce. Due to declining membership, regional guilds in the motor vehicle repair sector decided to look for new organisational patterns.

Several of such guilds in the motor vehicle repair sector cancelled existing collective agreements and formally renounced their collective bargaining competence in 2007. In doing so, they paved the way for the establishment of new employer organisations (*Tarifgemeinschaften*) to take over collective bargaining. In these regions, employers in the motor vehicle repair sector can henceforth join a regional guild without being bound by collective agreements. In this respect, regional guilds in western Germany have followed the example set by their eastern German counterparts. The latter had already ceded their collective bargaining competence and established a new employer organisation at the beginning of 2005.

2.5 Other roles do national sectoral employer organisations

As outlined above, sectoral employer organisations usually offer a variety of services to their members. In addition to their involvement in collective bargaining, they provide legal advice and information services. Further, sectoral employer organisations usually represent their sector's common interests and joint positions in dealings with other institutions, such as governmental bodies, trade unions and the media.

2.6 Evidence of change in the composition of the leaderships of sectoral employer organisations

The BDA reports that no structural changes have taken place concerning its own leadership. Further information on structural changes in the leadership of sectoral employer organisations was however not available. The ZDH emphasises that women and members of ethnic minorities were represented in the leadership of some of its member organisations even before 2003 and this situation has not changed since then.

3 Other employer organisations

Organisations representing employers or entrepreneurs along 'non-traditional' lines exist, e.g. for Turkish or female entrepreneurs. The ones to my knowledge have however to be considered as trade or business associations. The association of German female entrepreneurs (Verband deutscher Unternehmerinnen, VdU), for example, maintains close cooperation with BDA, BDI, DIHK.

4 Commentary

Large establishments are predominantly covered by sectoral-level collective agreements. However, small establishments that are not covered by collective agreements also use the existing sectoral-level collective standards as guidelines for wage negotiations. Therefore, national peak and sectoral employer organisations still play a decisive role in industrial relations. As outlined above, several adjustments to the organisational patterns of sectoral or lower-level employer associations have been made to satisfy the needs of members and to enhance the influence of employer organisations. Such adjustments have included mergers and disaffiliations of employer organisations, the introduction of new forms of membership status and the introduction of opening clauses in collective agreements.

References

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- Peter; Kohaut, Susanne: Tarifbindung und betriebliche Interessenvertretung: Ergebnisse des IAB-Betriebspanels 2003 (Collective bargaining coverage and employee representation: Results of the IAB Establishment Panel 2003), WSI-Mitteilungen, Vol. 57, No. 8, 2004

Final questionnaire for the EIRO CAR on ‘Developments in social partner organisations: employer organisations’

1. National ‘peak’ employer organisations

1.1 Please list all the national ‘peak’ employer organisations in your country (see the background note for definitions of ‘employer organisation’ and ‘national peak employer organisation’ and for the private/public scope of this study). For each organisation, give a brief summary of

a) its constituency

Does it seek to represent all companies, or specific types of company (eg SMEs, co-operatives, not-for-profit companies, mutual societies, self-employed people with employees), or companies in particular sectors?

b) its membership structure

Is its membership made up of lower-level employer organisations, individual companies, or both?

c) its size

How many lower-level employer organisations are affiliated, how many companies are affiliated (either directly or through affiliated lower-level employer organisations), what proportion of all companies in your country is affiliated (directly or indirectly), and what proportion of all employment in your country is represented by (directly or indirectly) affiliated companies?

d) its nature

Does it solely represent affiliates’ interests in labour market/industrial relations matters, or does it also function as a trade association representing companies’ other business interests (see briefing note for definition)?

1.2 What changes have there been since the start of 2003 in the structure of national ‘peak’ employer organisations? Please indicate reasons for any changes noted.

Relevant changes might include: the creation of new peak organisations; mergers or increased cooperation between existing peak employer organisations; mergers or increased cooperation between peak employer organisations and trade associations; splits in existing peak organisations; new affiliations to, or disaffiliations from; peak organisations by lower-level employer organisations; and increases or decreases in membership. Please pay particular attention to any developments in respect of organisations representing specific types of company (eg SMEs, cooperatives, not-for-profit companies, mutual societies, self-employed people with employees).

1.3 What is the collective bargaining role of each peak organisation listed in 1.1?

Has there been any change in this area since the start of 2003 and, if so, why?

Do they engage directly in collective bargaining with trade unions (and if so, on which subjects)? Do they coordinate the bargaining activity of affiliated lower-level employer

organisations or companies? Do they provide assistance, advice or information on bargaining to affiliates?

1.4 What involvement does each of the peak organisations listed in 1.1 have in tripartite and/or bipartite consultations? Has there been any change in this area since the start of 2003 and, if so, why?

Are they represented on standing tripartite and/or bipartite consultative or advisory bodies? Are they involved in other formal or informal tripartite and/or bipartite consultative processes?

1.5 What, briefly, is the role of each of the peak organisations listed in 1.1, other than in the areas referred to in 1.3 and 1.4? Has there been any change in this area since the start of 2003 and, if so, why?

Examples might include lobbying, provision of expert advice to, and analysis for, affiliates, or provision of consultancy services to affiliates.

1.6 Is there any evidence of change since 2003 in the composition of the leaderships of the organisations listed in 1.1, in terms of the representation of women, people from ethnic minorities, nationals of other countries etc.

The “leadership” refers to the top elected positions (eg presidents) and governing bodies of employer organisations and to senior executive positions (eg general secretaries).

2 Sectoral employer organisations

2.1 Please give a brief summary of the sectoral structure of employer representation in your country (see the background note for definition of ‘sectoral employer organisation’).

For example, how many national sectoral employer organisations are there? Do they exist in all sectors? Do they tend to cover broad or narrow sectors? What proportion of all companies and/or all employment in their sector do they represent? Are there sectoral organisations representing specific types of company (eg SMEs, cooperatives, not-for-profit companies, mutual societies, self-employed people with employees)? Are there important sectoral organisations that are not affiliated to one of the peak organisations listed in 1.1?

2.2 What changes have there been since the start of 2003 in the structure of sectoral employer organisations? Please indicate reasons for any changes noted.

Relevant changes might include: the creation of new organisations; mergers or co-operation between employer organisations in adjoining sectors; mergers or cooperation between sectoral employer organisations and sectoral trade associations; splits in existing organisations; new affiliations to peak organisations, or disaffiliations/changes of affiliation; and membership trends. Please pay particular attention to developments in respect of any sectoral organisations representing specific types of company (eg SMEs, cooperatives, not-for-profit companies, mutual societies, self-employed people with employees).

2.3 What is the collective bargaining role of national sectoral employer organisations?

Do they engage directly in collective bargaining with trade unions (and if so, on which subjects)? Do they coordinate the bargaining activity of affiliated companies? Do they provide assistance, advice or information on bargaining to affiliates?

2.4 Has there been any change in the collective bargaining role of national sectoral employer organisations since the start of 2003. Please indicate reasons for any changes noted.

For example, have sectoral organisations started to engage in bargaining, or ceased to do so, or has the nature of bargaining changed (for example, through the negotiation of looser framework agreements at sector level, with more scope for company-level flexibility)?

2.5 Briefly, aside from bargaining, what other roles do national sectoral employer organisations play? Has there been any change in this area since the start of 2003 and, if so, why?

Examples might include involvement in bipartite/tripartite consultation, lobbying, or provision of advice, analysis or consultancy services to affiliates. Specifically, if any national sectoral organisations have reduced their collective bargaining role, have they developed new roles to compensate?

2.6 Is there any evidence of change since 2003 in the composition of the leaderships of sectoral employer organisations, in terms of the representation of women, people from ethnic minorities, nationals of other countries etc.

The “leadership” refers to the top elected positions (eg presidents) and governing bodies of employer organisations and to senior executive positions (eg general secretaries).

3 Other employer organisations

- 3.1 Are there other levels of employer organisation (other than national peak organisations and national sectoral organisations) that have an important role in industrial relations in your country? Examples might include regional or province-level organisations, either sectoral or cross-sectoral. If so, please give brief details of their structure and role and indicate if there has been any change since the start of 2003.
- 3.2 Have any innovative forms of employer organisation developed in recent years, which represent employers on non-traditional lines (ie, not purely based on sectoral or geographical considerations)? If so, please give details and reasons.

4 Commentary

Please provide a brief commentary on the development of employer organisations in your country since 2003.