

# Social Dialogue structures & Paritarian organisations in CEE

## REPRESENTATIVENESS STUDY for the CONSTRUCTION sector

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# 12.687.246 employees in construction in EU27 in 2019



5 MS have >1 Million employees in the construction sector in 2019			5 MS have between 350.000 and 500.000 employees in the construction sector in 2019		
Germany	2.643.029	20.8%	Netherlands	493.119	3.9%
France	1.759.286	13.9%	Sweden	439.258	3.5%
Spain	1.337.009	10.5%	<b>Romania</b>	407.008	3.2%
Italy	1.319.155	10.4%	<b>Czechia</b>	381.643	3.0%
<b>Poland</b>	1.065.139	8.4%	Portugal	353.398	2.8%
	8.123.618	64%		2.074.426	16.4%
4 MS have between 200 and 350.000 Employees  BE, AT, <b>HU</b> , FI		7 MS have between 100 and 200.000 employees  DK, <b>SK</b> , IE, <b>BG</b> , EL, <b>HR</b> , <b>LT</b>		3 MS have between 50 and 100.000 employees  <b>SI</b> , <b>LV</b> , <b>EE</b>	
LU = 49.028 CY = 34.381 MT = 13.144					

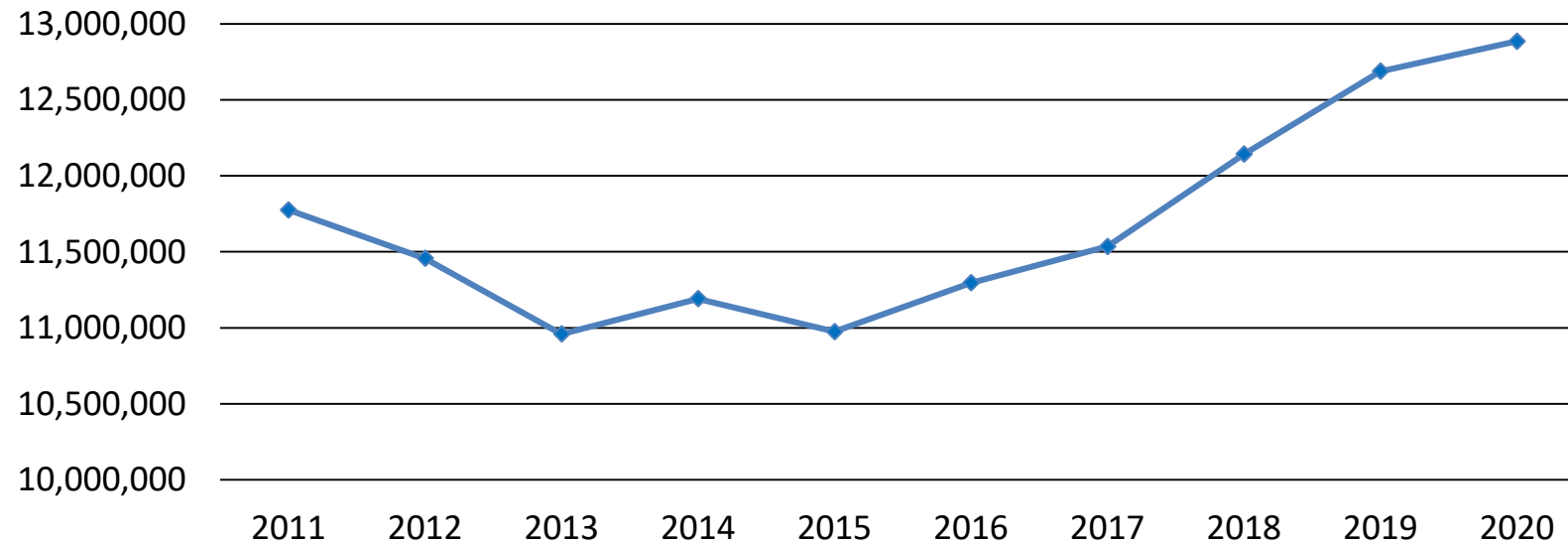
Note: CEE countries in **RED bold**

# 6.8% of the EU workforce is employed in construction

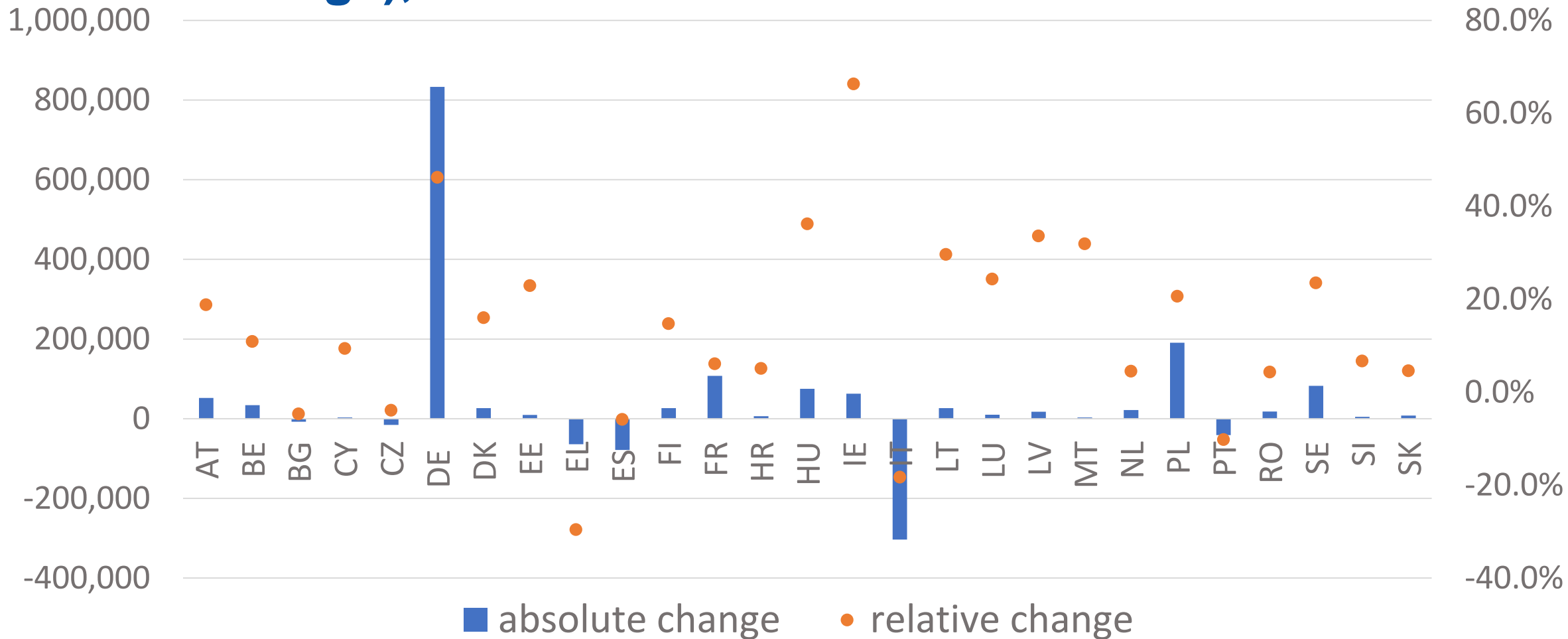


9.0 to 9.9%	7.9 to 8.9%	7.0-7.8%	6.0 to 6.9%	Less than 6%
CY 9.7%	<b>RO</b> 8.5%	SE, <b>CZ</b> , BE, <b>HU</b> , FI,	DE, FR, ES, PT, DK, IE,	EL 3.8%
<b>EE</b> 9.3%	AT 8.3%	<b>LT</b>	<b>HR</b> , MT	NL 4.6%
<b>SK</b> 9.2%	<b>PL</b> 8.0%			LU 5.6%
<b>LV</b> 9.1%	<b>BG</b> 7.9%			<b>SI</b> 5.8%
				IT 5.8%

Note: CEE countries in **RED bold**



# Change in construction sector employment (absolute and relative change), 2011-2020



# 3 sub sectors

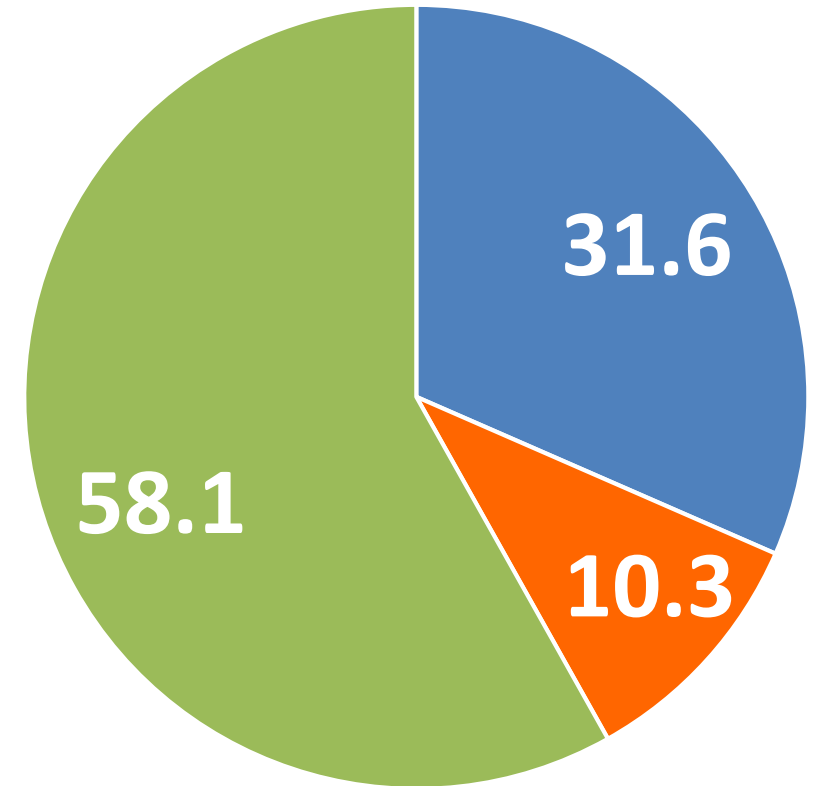


<b>NACE 41</b>	<b>Construction of buildings</b>
Development of buildings projects Construction of residential (houses and apartment blocks) and non-residential buildings (factories, hospitals, schools, office buildings, hotels, stores, restaurants, airport buildings, sport facilities, garages, warehouses, religious buildings, erection of prefabricated constructions)	
<b>NACE 42</b>	<b>Civil engineering</b>
Construction of roads and motorways, railways and underground railways, bridges and tunnels, utility projects for fluids and for electricity and telecom, other civil engineering projects	
<b>NACE 43</b>	<b>Specialised construction activities</b>
Demolition, Site Preparation, Test drilling and boring, Electrical installations, Plumbing, heat and air-conditioning installation Plastering, Joinery installation, Floor and wall covering, Painting and glazing, Roofing	

# 3 subsectors / activities



	NACE 41	NACE 42	NACE 43
Number of companies	843,199 <b>24.7%</b>	89,968 <b>2.6%</b>	2,480,123 <b>72.7%</b>
Number of workers (total employment)	4,161,200 <b>31.6%</b>	1,361,200 <b>10.3%</b>	7,666,800 <b>58.1%</b>
Average workforce size per company	4.9	15.1	3.1



NACE 41	Construction of buildings
NACE 42	Civil engineering
NACE 43	Specialised construction activities

# Largest companies



Proportion of the national workforce employed by the largest 3 companies				
Average number of workers per company	<2%	2-4%	5-8%	>9%
2-3	BE, <b>CZ, HU, IT, LT, PL, SK</b>	EL, IE, MT		ES, NL,
4-5	CY, <b>HR, SI,</b>	DK, <b>EE, FI, PT,</b>	SE,	FR,
6-7	<b>BG, RO,</b>	DE, <b>LV,</b>		
8+		LU,	AT	

Note: CEE countries in **RED bold**

## 3 largest companies in CEE member states

<b>BG</b>	PMU, STRABAG, n.a.	<b>LV</b>	Latvijas autoceļu uzturētājs, UPB, Latvijas energoceltnieks
<b>CZ</b>	METROSTAV, STRAGAB, SKANSKA	<b>PL</b>	BUDIMEX, STRABAG, SKANSKA
<b>EE</b>	ENEFIT CONNECT, TREV-2 GRUPP, MERKO EHITUS EESTI	<b>RO</b>	HIDROCONSTRUCTIA SA, TEHNOSTRADE SRL, ASTALDI SPA ITALIA SUCURSARLA ROMANIA BUCURESTI
<b>HR</b>	STRABAG, KAMGRAD, DALEKOVOD	<b>SI</b>	CGP, POMGRAD, KOLEKTOR
<b>HU</b>	DUNA ASZFALT, STRABAG, MARKET EPITÖ	<b>SK</b>	DOPRASTAV, SKANSKA SK, STRABAG
<b>LT</b>	KAUNO TILTAI, YIT LIETUVA, AUTOKAUSTA		



# Collective bargaining in the construction sector



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

Note: CEE countries in **RED bold**



# 41 Construction sector social dialogue structures

## Paritarian organizations in 2 CEE (BG, RO)



SD structures	EU 27	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR
Bbipartite	32/41	2	4			2		2				1	6	1
<b>Tripartite</b>	9/41			1										
	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
Bbipartite	1	2	5			1		1			1	3		
<b>Tripartite</b>	1						1	1	3	1		1		

Health and safety	DK, FI, FR, <b>HR</b> , IT, <b>PL</b> , PT, SE
Education & Training	<b>CZ</b> , <b>CZ</b> , FR, FR, <b>HU</b> , IT, MT, <b>PL</b> , RO, SE, SE
Working conditions	BE, BE, <b>HR</b> , <b>HU</b> , IE, <b>LV</b> , NL, <b>PL</b> ,
Manage change, sustainability	AT, AT, FR, NL, SE
Social Fund, Social protection, Healthcare, pensions	BE, BE, DK, FR, FR, FR, IT IT IE, IT

# Table: Involvement of construction sector trade unions in SD, CB, Par.org.



MS	Trade union	Involvement in bipartite/tripartite SD	Involvement in paritarian organisation	Paritarian organization	Consultation by government	Involvement in collective bargaining
<b>BG</b>	<b>FITUC</b>	yes	no		no	Yes (sector+ company)
<b>BG</b>	<b>FCIW</b>	yes	no		regularly	Yes (sector+ company)
<b>BG</b>	Podkrepa		yes	Construction Training Center (CTC)		
<b>CZ</b>	<b>OS STAVBA</b>	yes	no		ad hoc	Yes (sector+ company)
<b>EE</b>	ETTA	no	no		ad hoc	Yes (company)
<b>EE</b>	EEAÜL	no	no		no	Yes (company)
<b>HR</b>	<b>SGH</b>	yes	no		regularly	Yes (sector+ company)
<b>HR</b>	<b>NCS</b>	no	no		no	Yes (company)
<b>HU</b>	<b>EFEDOSZSZ</b>	yes	no		no	Yes (sector+ company)
<b>LT</b>	LPPSF	no	no		ad hoc	Yes (company)
<b>LT</b>	SPS	no	no		ad hoc	No
<b>LV</b>	<b>LBNA</b>	yes	no		ad hoc	Yes (sector+ company)
<b>LV</b>	LCDA	yes	no		no	Yes (company)
<b>PL</b>	<b>SBiPD NSZZ Solidarnosc</b>	yes	no		ad hoc	Yes (company)
<b>PL</b>	<b>ZZ Budowlani</b>	yes	no		regularly	Yes (company)
<b>RO</b>	<b>FGS Familia</b>	no	yes	Casa Social a Constructoril (Builders' Social Fund)	no	Yes (sector+ company)
<b>SI</b>	<b>SDGD</b>	yes	no		ad hoc	Yes (sector+ company)
<b>SI</b>	SCGS	yes	no		regularly	Yes (sector+ company)
<b>SK</b>	<b>IOZ</b>	yes	no		regularly	Yes (sector+ company)

Note: organisations in **bold** are affiliated to EFBWW.

# Table: Involvement of construction sector EOs in SD, CB, Par.org.



MS	Employer organisation/ business association	Involvement in bipartite/tripartite SD	Involvement in paritarian organisations	Paritarian organizations	Consultation by government	Involvement in collective bargaining
<b>BG</b>	<b>BCC</b>	yes	no		no	Yes (company)
<b>CZ</b>	<b>SPS</b>	yes	no		ad hoc	Yes (sector+ company)
<b>EE</b>	<b>EEEL</b>	no	no		regularly	No
<b>HR</b>	<b>HUP-UPG</b>	yes	no		regularly	Yes (sector+ company)
<b>HR</b>	<i>HOK</i>	no	no		regularly	No
<b>HU</b>	<b>EVOSZ</b>	yes	no		regularly	Yes (sector)
<b>HU</b>	<i>IPOSZ</i>	yes	no		ad hoc	No
<b>LT</b>	<b>LSA</b>	no	no		ad hoc	No
<b>LV</b>	<b>LBP</b>	yes	no		regularly	Yes (sector)
<b>LV</b>	<i>LBA</i>	yes	no		regularly	Yes (sector)
<b>LV</b>	<b>LCBB</b>	yes	no		regularly	Yes (sector)
<b>PL</b>	<b>PZPB</b>	yes	no		regularly	No
<b>PL</b>	<i>ZRP</i>	yes	no		regularly	No
<b>PL</b>	<b>KBiN</b>	yes	no		regularly	No
<b>RO</b>	<b>UNPR</b>	no	no		regularly	No
<b>RO</b>	<i>ZEPHER Cluster</i>	no	no		no	No
<b>RO</b>	<b>ARACO</b>	yes	yes	?????	regularly	No
<b>RO</b>	<b>FPSC</b>	yes	yes	Casa Social a Constructoril (Builders' Social Fund)	ad hoc	Yes (sector)
<b>SI</b>	<b>GZS - CCBMIS</b>	yes	no		ad hoc	Yes (sector)
<b>SI</b>	<b>ZDS</b>	yes	no		ad hoc	Yes (sector)
<b>SI</b>	<b>OZS</b>	no	no		no	No
<b>SK</b>	<b>ZSPS</b>	yes	no		regularly	Yes (sector+ company)
<b>SK</b>	<b>SZZ</b>	yes	no		regularly	No

Note: organisations in **bold** are affiliated to FIEC.

# More information or Further questions

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*“The tripartite EU agency  
providing knowledge to  
assist in the **development  
of social and work-  
related policies**”*