

Industrial relations

Representativeness of the European social partner organisations: Temporary agency work sector



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Country codes

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

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners – that is, the trade unions and employer organisations – in the temporary agency work (TAW) sector and to show how they relate to the sector's European-level organisations representing employees 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 three parts, following the introductory part of the report: (i) economic background and employment trends in the sector; (ii) national level of interest representation; and (iii) European level of interest representation.

This section presents the objectives of the study along with a brief introduction to European-level social dialogue in the TAW 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 an eligibility criterion for setting up or participating in an ESSDC.
- Representativeness means also having the capacity to negotiate agreements that can be implemented by 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 the 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;
- 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 that are representative of several Member States;
- have adequate structures to ensure its effective participation in the work of the committees.

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

0.2. Historical background of European social dialogue in the temporary agency work sector

The ESSDC for TAW was set up in 1999. The question of the regulation of TAW had been on the agenda of EU policymakers since the 1980s. In 1982, the European Commission proposed a draft directive to regulate temporary work agencies (TWAs) and ensure the equal treatment and protection of temporary employees. This draft directive, revised in 1984, was designed to cover both agency work and fixed-term contracts, but no agreement was reached on this draft. The question of the regulation of TAW resurfaced in the 1990s due to two key events. The first was the 1989 adoption of the Community Charter of Fundamental Social Rights for Workers, which aimed to harmonise and enhance living and working conditions, including those of temporary workers ⁽¹⁾. The second was the 1997 revision of International Labour Organization Convention No 96, which pertains to fee-charging employment agencies. Initially enacted in 1949, this convention significantly limited the operations of such agencies. However, the Commission believed that the 1997 revision allowed the sector to expand.

These significant developments, along with the industry's development potential, led to a policy debate on the creation of a specific European directive on TAW. In 1990, as part of the action programme accompanying the Community Charter of Fundamental Social Rights for Workers, the Commission suggested introducing legislation in this area. The charter mentions the need to align and improve forms of employment such as temporary work, stating that '[t]he improvement must cover, where necessary, the development of certain aspects of employment regulations' (Article 7).

Despite the Commission's efforts, no progress was made. However, this did not prevent the adoption of a directive on improving the safety and health at work of temporary workers on 25 June 1991 (Council Directive 91/383/EEC). This directive did not cover other important aspects of agency work, such as contract duration and renewal, the conditions under which user companies can use temporary agency staff, pay and working condition parity between temporary agency workers (TAW workers) and equivalent permanent staff in user companies, and trade union rights and collective representation. Against this backdrop, the European social dialogue partners began addressing the issue from 1995 onwards, thereby structuring social dialogue in this sector.

Following a period of failed negotiations between social partners in 2001, the European Commission adopted a proposal for a Directive on TAW in 2002. The proposal aimed to ensure the equal treatment of TAW workers, giving them the same pay and basic working conditions as permanent workers in the same or similar roles. After revisions in 2002 and attempts to reach a consensus in the Council of Ministers in 2003, following the agreements made by the social partners, the directive was adopted by the European Parliament and Council in 2008 (European Parliament and Council, 2008; Eurofound, 2012).

⁽¹⁾ The charter emphasises the importance of the equal treatment of all workers, including those in non-standard forms of employment like temporary work. Specifically, Article 7 states that all employment relationships must provide fair conditions regarding wages, social protection and other labour rights. This principle is critical for temporary workers, who may face unequal treatment compared with that of permanent employees.

The current ESSDC for TAW covers workers who ‘have an employment contract or relationship with a temporary work (temp) agency and who are assigned to work temporarily for client companies’, based on legal definitions within the Directive on TAW (European Commission, undated). **Two sector-related European organisations are listed as representative for TAW:** on the part of the trade unions, the European Service Workers Union (**UNI Europa**) (a regional organisation of UNI Global Union) represents the workforce of this sector, while employers are represented by the **World Employment Confederation (WEC) – Europe (WEC-Europe)**, an organisation previously known as Eurociett, but rebranded in September 2016 ⁽²⁾.

Since UNI Europa organises its members by sector and group, in this study, UNI Europa will be referred to as ‘UNI Europa Agency Workers’ in relation to its work within the agency work sector, and members of UNI Europa for the TAW sector will be referred to as ‘members of UNI Europa Agency Workers’ (see Table 1).

Table 1: Organisations currently represented on the ESSDC for TAW

Representing workers	Representing employers
UNI Europa Agency Workers (the European union for the TAW sector; UNI Europa’s sectoral structure for TAW)	WEC-Europe

Source: European Commission, undated.

One of the committee’s first significant achievements was a joint declaration in 2000, which set the foundation for ongoing social dialogue in agency work (see Table 2). Over the years, the committee has covered a variety of issues, such as the development of the sector, corporate social responsibility, accident prevention, the promotion of social dialogue, and training and lifelong learning related to the sector.

Currently, the committee is focusing on several key areas in relation to labour market policies and changes in the world of work (Europe 2020 strategy, European semester, combating undeclared work); the promotion of dialogue between national employer and worker organisations; the regulation of temporary work; and workers’ rights to move freely, including between EU Member States (European Commission, undated). Additionally, the committee emphasises decent work, non-discrimination and equal treatment, while also promoting the ratification of International Labour Organization Convention No 181 and Recommendation No 188 (European Commission, undated). According to WEC-Europe, the committee may form other groups, such as task forces and networks, depending on its needs and based on specific challenges, topics or interests (WEC-Europe, undated-a). A new EU sectoral social dialogue work programme was adopted in December 2024 ⁽³⁾ and focuses on addressing the most pressing challenges that European labour markets face in relation to labour law and employment policies as identified by the sectoral social partners. WEC-Europe and UNI Europa

⁽²⁾ The rebranding aimed to reflect ‘the industry’s extended territory (the world of employment) and the broadening of its membership base’ (WEC-Europe, 2016).

⁽³⁾ The new joint work programme is available on the WEC-Europe website (<https://www.weceurope.org/news-post/european-social-partners-for-temporary-agency-work-sector-adopt-work-programme-2025-2027/>).

Agency Workers aim to continue playing an active role in EU social policies and plan to conduct joint projects on capacity building and labour mobility.

In recent years, the European social partners have developed a number of joint initiatives related to TAW. During 2018–2023, the social partners adopted five joint texts, with the first four tackling the issues of online talent platforms (2018), social innovation (2020) and the impact of the COVID-19 pandemic (2020) and the recovery from it (2022), while the most recent joint text commemorates the Year of Skills (2023), with joint commitments and recommendations on ‘training for inclusive and resilient labour markets’ ⁽⁴⁾ (see Table 2). In 2024, UNI Europa and WEC-Europe started the new joint project ‘Capacity building in the temporary agency work sector’, which focuses on enhancing social dialogue in the TAW sector (UNI Europa, 2024).

Table 2: History of European social dialogue in the TAW sector – key texts

Date	Text	UNI Europa	WEC-Europe (prior to 2016: Eurociett)
9 May 2023	<i>European Year of Skills: Social dialogue as a driving force forward</i>	Yes	Yes
1 February 2022	<i>Towards more dynamic, inclusive and resilient labour markets in Europe: Lessons learned during the COVID-19 pandemic and recommendations for sustaining the economic and social recovery</i>	Yes	Yes
1 December 2020	<i>New ways of working, learning and social protection in the temporary agency work sector – Joint recommendations on social innovation as a follow-up of a joint EU sectoral social dialogue project</i>	Yes	Yes
29 April 2020	<i>Protecting workers in the COVID-19 pandemic, safeguarding work and preparing for an inclusive economic and social recovery – Joint recommendations of the sectoral social partners of the temporary agency work industry</i>	Yes	Yes
16 May 2018	<i>Joint recommendations of the EU sectoral social partners for temporary agency work – ‘Online talent platforms, labour market intermediaries and the changing world of work’</i>	Yes	Yes
24 March 2015	<i>Joint declaration on the results of the research on comparing temporary agency work with other forms of employment</i>	Yes	Yes

⁽⁴⁾ *European Year of Skills: Social dialogue as a driving force forward*, published by WEC-Europe and UNI Europa in 2023, can be accessed through the European Commission’s Social Dialogue Texts Database (https://employment-social-affairs.ec.europa.eu/policies-and-activities/eu-employment-policies/social-dialogue/social-dialogue-texts-database_en).

12 September 2014	<i>Eurociett / UNI Europa statement on the roundtable on temporary agency work in Serbia</i>	Yes	Yes
1 July 2013	<i>Eurociett / UNI Europa joint statement on the roundtable on temporary agency work social dialogue</i>	Yes	Yes
8 February 2013	<i>The role of temporary agency work and labour market transitions in Europe</i>	Yes	Yes
19 December 2012	<i>Joint Eurociett / UNI Europa recommendations on temporary agency work facilitating transitions in the labour market</i>	Yes	Yes
1 June 2010	<i>European Observatory on crossborder activities within the temporary agency work sector – Work programme for 2010</i>	Yes	Yes
3 December 2009	<i>Agreement between UNI Europa and Eurociett to set up a European Observatory on crossborder activities within the temporary agency work sector</i>	Yes	Yes
3 December 2009	<i>Eurociett / UNI Europa joint declaration – Training for temporary agency workers: Joint actions developed by sectoral social partners play a key role in facilitating skills upgrading</i>	Yes	Yes
28 May 2008	<i>Eurociett/UNI-Europa joint declaration on the directive on working conditions for temporary agency workers</i>	Yes	Yes
28 February 2007	<i>Eurociett/UNI-Europa joint declaration within the framework of the ‘flexicurity debate’ as launched and defined by the EU Commission</i>	Yes	Yes
20 October 2006	<i>Rules of procedure for the European sectoral social dialogue committee in the temporary agency work sector</i>	Yes	Yes
8 October 2001	<i>Euro-CIETT/UNI-Europa joint declaration objectives of the European Directive on Private Agency Work</i>	Yes	Yes
3 July 2001	<i>Euro-CIETT/UNI-Europa joint declaration on the sectoral social dialogue on agency work</i>	Yes	Yes
3 July 2000	<i>Euro-CIETT/UNI-Europa – Joint declaration on the sectoral social dialogue on agency work</i>	Yes	Yes

Source: European Commission, Social Dialogue Texts Database (https://employment-social-affairs.ec.europa.eu/policies-and-activities/eu-employment-policies/social-dialogue/social-dialogue-texts-database_en).

0.3. Definitions and methodology

The methodology applied is linked to the representativeness 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 TAW in agreement with the social partners and the European Commission. When analysing the way trade unions and employer organisations relate to the sector, this 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 **Statistical Classification of Economic Activities in the European Community** (NACE) (Rev. 2) codes (Eurostat, 2008). All existing ESSDCs have been demarcated with a NACE code, which defines the scope of the economic activities covered by each committee. The NACE code to be applied in each sectoral representativeness study is confirmed by the European Commission after consultation with the social partners.

Sector demarcation for the temporary agency work representativeness study

Traditionally, for the purposes of representativeness studies, any given sector is defined based on NACE codes (Eurostat, 2008). However, **TAW is not only an economic sector but also a form of employment**. This means that, although there is a NACE code that covers the activities of temporary employment agencies, the code has been used to gather data on companies and businesses in the sector and as general guidance, not as a strict demarcation of the sector for this representativeness study.

Therefore, this representativeness study covers **TAW workers across all sectors** of the economy, but also looks at **employers and employees in the TAW industry**, as defined by NACE (Rev. 2) code 78.2 – Temporary employment agency activities (see Box 1).

Box 1: Definition of the scope of the representativeness study for TAW as a sector

NACE 78.20 – Temporary employment agency activities

This class includes the activities of supplying workers to clients' businesses for limited periods of time to temporarily replace or supplement the working force of the client, where the individuals provided are employees of the temporary help service unit. However, units classified here do not provide direct supervision of their employees at the clients' work sites.

In simple terms, to define what is part of the TAW sector and what is not, it is crucial to consider the triangular relationship characterising this sector. This relationship comprises the following three elements:

- a direct employment contract between the TAW worker and the TWA;
- the temporary assignment of the worker to the company in which the TWA places them (the duration can vary, but it must be temporary);
- the direction of the work and the supervision of the TAW worker controlled by the company, not the TWA.

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 TFEU;
- they participate in sector-related European social dialogue.

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

A **national organisation** is considered a relevant sector-related interest organisation if it meets criteria A and B.

- A. The organisation's domain relates to the sector.
- B. The organisation is either:
 - affiliated to 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 NACE 78.2); this type of sector-relatedness is called 'congruence'. If the membership domain of an organisation goes beyond TAW sector as defined here, it is categorised as 'overlapping'. 'Sectionalism' is a type of sector-relatedness whereby an organisation covers part of the

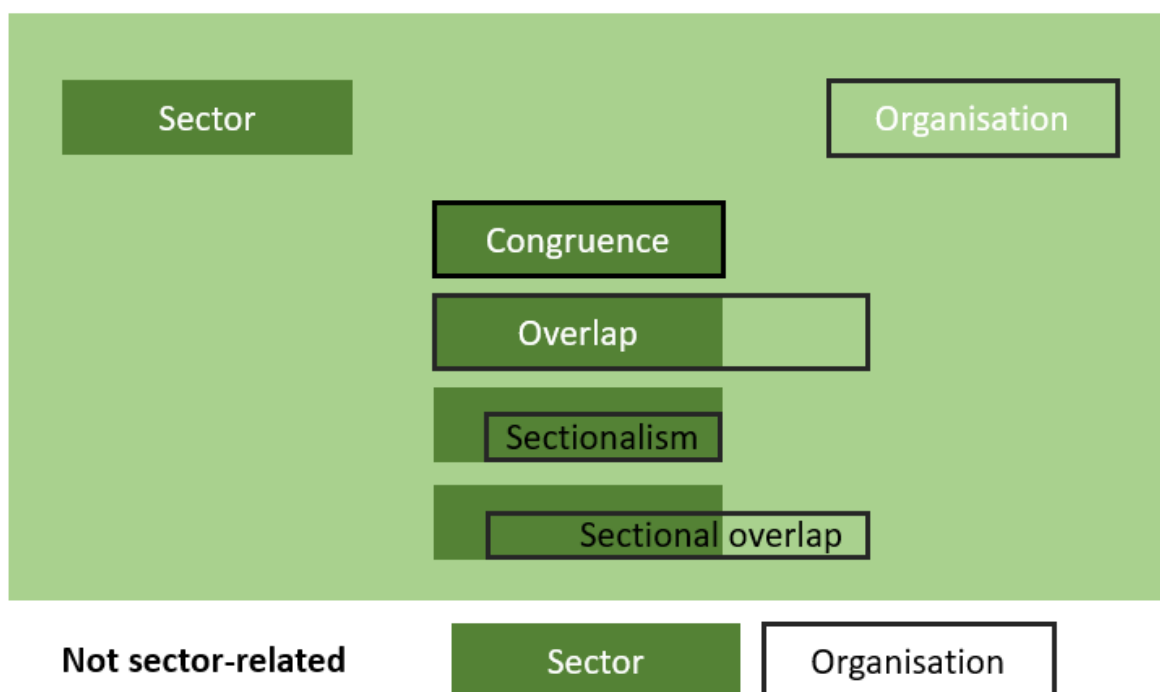
sector and nothing else, whereas organisations that fall into the category of ‘sectional overlap’ cover part of the sector and also have members in other sectors.

Table 3: Membership domain patterns of organisations

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 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 an EU-level trade union / 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, 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 (i.e. membership through another organisation to which the employer organisation or trade union is affiliated) is taken into account 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 EU-wide through the support of their affiliates. To assess their capacity to negotiate, the social partners and the objectives and decision-making structures provided for in their statutes are considered, as are the outcomes in terms of texts agreed. The processes through which the organisations obtain mandates, support and approval from their member organisations in the negotiation processes 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 for negotiations to take place at the European level, which 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 on the ESSDC contributes significantly to the committee'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 only defend their members' interests 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 reach compromises and agreements with organisations representing different interests. In its analysis, this report aims to distinguish between these different types of organisations. The ability to engage in collective bargaining on pay and working conditions is influenced by the national legal framework for TAW, which, in many countries, provides for statutory regulation of equal treatment and equal pay.

Finally, representativeness also depends upon the organisations' structures and resources, their capacity to encourage the active participation of their members and combine the different interests of member organisations, and their potential to act autonomously at the European level. **Effective participation in the ESSDC** is assessed in terms of presence at the meetings in 2020–2023.

0.4. Data collection and quality control measures

Data collection

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

Unless otherwise stated, this study draws on the Member-State-level studies provided by the Network of Eurofound Correspondents. To ensure responses to questions were not left blank, estimates were used where precise quantitative data could not be obtained. Thus, quantitative data – such as those 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 provided by the Network of Eurofound Correspondents or representatives of the organisations ⁽⁵⁾.

Other sources used in this report include the European Commission’s Social Dialogue Texts Database and the articles of organisation of the EU-level organisations.

The information used in this study was collected by the Network of Eurofound Correspondents in a series of 27 national contributions. The national correspondents, who are all industrial relations experts, are required to gather data on all relevant organisations at the national level and to contact them by telephone or email to complete standardised questionnaires. While the questionnaires are in English, correspondents can interview or contact the organisation in the appropriate national language. The questionnaires are completed by the national correspondents.

Specific data characteristics in the temporary agency work representativeness study

Table 4 summarises the two main data sources regarding TAW, based on the selected approach. If TAW is treated as a **sector**, then the sectoral approach is used, which defines TAW as activities under NACE 78.2. Data on three-digit activities are taken from Eurostat’s structural business statistics (SBS). Importantly, with the sectoral approach, **a worker from a temporary employment agency is an employee of that agency and not of the user undertaking (customer) for which they work.**

If TAW is treated as a **form of employment** that is cross-sectoral and is to be found across all economic activities, then it is measured using data on a form of employment, available from Eurostat’s European Union Labour Force Survey (EU-LFS). Here, the **numbers of employees include those workers who have a contract with a temporary employment agency for their main job.** People working directly for the temporary employment agency, meaning that they are not employed to work for and under the supervision of a user enterprise, are not included in the statistics. This means that TAW workers can be found distributed across all sectors of the economy and not just under one NACE code as they are

⁽⁵⁾ It is acknowledged that the quality of these data sources may vary. While data from social partners are self-reported, national data (gathered for this study by the Network of Eurofound Correspondents) are usually based on official national statistics.

in the sectoral approach. More information on the various consequences of selecting an approach is provided in Chapter 1.

Table 4: Classification of data used in the representativeness study on TAW

	Focus	
Approach	Form of employment	Sector defined by NACE 78.2 – Temporary employment agency activities
Measurement methodology	Measured by the number of temporary employment agency workers across all economic sectors	Measured by the number of employed people in this category
Data source	EU-LFS, Eurostat	SBS, Eurostat
Data description	Variable TEMPAGCY – Contract with a temporary employment agency for the main job The variable provides information (coded as ‘yes’ or ‘no’) about whether a person has a contract with a temporary employment agency for their main job People working directly for the temporary employment agency, meaning that they are not employed to work for and under the supervision of a user enterprise, should be coded as ‘no’	78.2 – Temporary employment agency activities <i>This class includes the activities of supplying workers to clients’ businesses for limited periods of time to temporarily replace or supplement the working force of the client, where the individuals provided are employees of the temporary help service unit. However, units classified here do not provide direct supervision of their employees at the clients’ work sites [emphasis added].</i> (Eurostat, 2008) An employee is defined as follows: <i>[A] person who works for an employer on the basis of a contract of employment and receives compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind.</i> [...] <i>A worker from a temporary employment agency is considered to be the agency’s employee and not that of the business unit to which he or she is assigned [emphasis added].</i> (Eurostat, undated)

Note: Red text indicates key takeaways.

Sources: For TAW as a sector, metadata on the SBS

(https://ec.europa.eu/eurostat/cache/metadata/en/sbs_esms.htm); for TAW as a form of employment, data on variable TEMPAGCY from the EU Labour Force Survey explanatory notes (<https://ec.europa.eu/eurostat/documents/1978984/6037342/EU-LFS+Explanatory+notes+from+Q1+2021+onwards.pdf/51353dd0-06de-2857-799a-dc1a92d70da8?t=1619349110590>).

Box 2 presents an extract from the Directive on TAW, which ensures that TAW workers are included in the count of workers for calculations of the representativeness of social partners.

Box 2: Provisions on the representation of TAW workers in the Directive on TAW

Article 7 – Representation of temporary agency workers

- 1. Temporary agency workers shall count, under conditions established by the Member States, for the purposes of calculating the threshold above which bodies representing workers provided for under Community and national law and collective agreements are to be formed at the temporary-work agency.*
- 2. Member States may provide that, under conditions that they define, temporary agency workers count for the purposes of calculating the threshold above which bodies representing workers provided for by Community and national law and collective agreements are to be formed in the user undertaking, in the same way as if they were workers employed directly for the same period of time by the user undertaking.*
- 3. Those Member States which avail themselves of the option provided for in paragraph 2 shall not be obliged to implement the provisions of paragraph 1.*

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 other sector-related organisations was collected from the reports prepared by the Network of Eurofound Correspondents, between January and June 2023. Subsequently, the authors of this report (including the Eurofound research manager responsible) checked the consistency of the national contributions and, where necessary, asked the national correspondents to revise them between July and November 2023. Based on the data collected, an overview report was drafted by the authors between December 2023 and September 2024.

A first, informal (pre-evaluation) consultation was carried out between December 2024 and January 2025. Using comments from the Commission and social partners as guidance, the draft report was finalised and prepared for formal evaluation by the Eurofound Advisory Committee on Industrial Relations, the European-level sectoral social partners identified in the report and the Directorate-General for Employment, Social Affairs and Inclusion. This formal evaluation was conducted through a written evaluation procedure in February 2025. Following this evaluation, final corrections were made and the report edited (language editing, checking for consistency and formatting), after which the study was published on the Eurofound website in 2025.

During this process, all 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 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 type, 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 governments, the European Commission and both sides of industry – as well as the evaluation and approval of the report by the European-level sectoral social partners identified, ensure the legitimacy of the findings of this study.

0.5. Structure of the report

As stated earlier in the introduction, the report consists of three main parts. It begins with a brief summary of the specific economic background and employment characteristics of the TAW sector. It then analyses the relevant social partner organisations in the 27 Member States. The third part considers the representative organisations at the European level.

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

1. Economic background and employment trends in temporary agency work

1.1. Triangular employment relationship in temporary agency work

This representativeness study covers TAW workers across all sectors of the economy but also looks at employers and employees in the TAW sector, as defined by NACE (Rev. 2) 78.2 – Temporary employment agency activities. As discussed in the introduction, the report focuses on TAW as a form of employment when referring to the employees engaged in this activity (see Section 0.3). However, for data on companies within the sector, the second approach – the sectoral approach – is used and the report refers to SBS data collected by Eurostat.

Given that the ESSDC for TAW uses ‘**Temporary agency work**’ (TAW) to define these economic activities, TAW will be used in the current report to designate temporary employment agency activities. The distinctions drawn in this representativeness study between employers, workers and undertakings in temporary employment are as follows.

1. **The companies will be referred to as TWAs.** Article 3(1)(b) of the Directive on TAW defines a TWA as:

any natural or legal person who, in compliance with national law, concludes contracts of employment or employment relationships with temporary agency workers in order to assign them to user undertakings to work there temporarily under their supervision and direction.

2. **The workers will be referred to as TAW workers.** Article 3(1)(c) of the directive defines a TAW worker as:

a worker with a contract of employment or an employment relationship with a temporary-work agency with a view to being assigned to a user undertaking to work temporarily under its supervision and direction.

3. **The undertaking under whose direction and supervision the TAW worker works will be referred to as a ‘user undertaking’ or ‘user company’.** Article 3(1)(d) of the directive defines a user undertaking as:

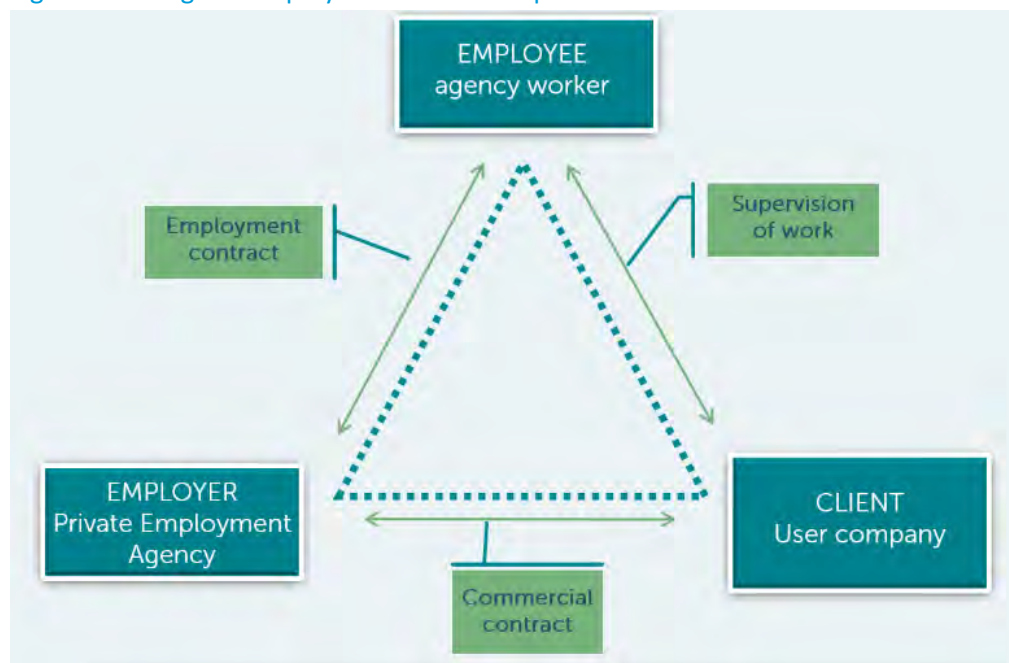
any natural or legal person for whom and under the supervision and direction of whom a temporary agency worker works temporarily.

The most important aspect of TAW is the distinct triangular relationship that characterises this sector. Figure 2 summarises this triangularity of employee (TAW worker), employer (TWA) and client (user company). The Directive on TAW guarantees the same basic working/employment conditions for TAW workers and the permanent staff of a user company (**the principle of equal treatment** ⁽⁶⁾). This requirement covers aspects of working conditions such as pay, duration of working time, overtime, breaks, rest periods, night shifts and holidays. The user undertaking must also guarantee

⁽⁶⁾ Article 5(1): ‘The basic working and employment conditions of temporary agency workers shall be, for the duration of their assignment at a user undertaking, at least those that would apply if they had been recruited directly by that undertaking to occupy the same job.’

TAW workers the same access to the collective facilities that are available to permanent staff – such as canteens, childcare facilities and transport services – unless there are objective reasons for differential treatment.

Figure 2: Triangular employment relationship in TAW



Source: WEC, undated.

According to the NACE methodology, class 78 employment activities (section N) also include the following codes:

- 78.10, covering the activities of employment placing agencies: listing employment vacancies and referring or placing applicants for employment, where the individuals referred or placed are not employees of the employment agencies;
- 78.30, covering other human resources provision: activities of providing human resources for client businesses.

However, activities under **codes 78.10 and 78.30 will not be covered by this representativeness study**, as they are not part of the ESSDC for TAW.

1.2. Employment in temporary agency work

TAW, along with part-time work and (temporary/fixed-term) contract work, is classified as a non-standard form of employment. In general, TAW has been used more and more as a response to the need for increased flexibility in employment (Eurofound, 2018). It is part of a wider phenomenon of increased externalisation of work through mechanisms such as domestic outsourcing, where tasks are no longer carried out by employees of a specific firm, but rather purchased from a service-providing firm or performed by a TWA (OECD, 2021; Drenik et al., 2023).

The following subsection presents data on the workforce in TAW based on the two approaches mentioned in the methodology (Section 0.3): first, considering it as a form of employment and,

second, viewing it as a sector. Alongside presenting the official data gathered from Eurostat, this study also presents data collected by the Network of Eurofound Correspondents in 2023. These data are based on the national statistics for each Member State.

TAW workers are reported in various ways in statistics:

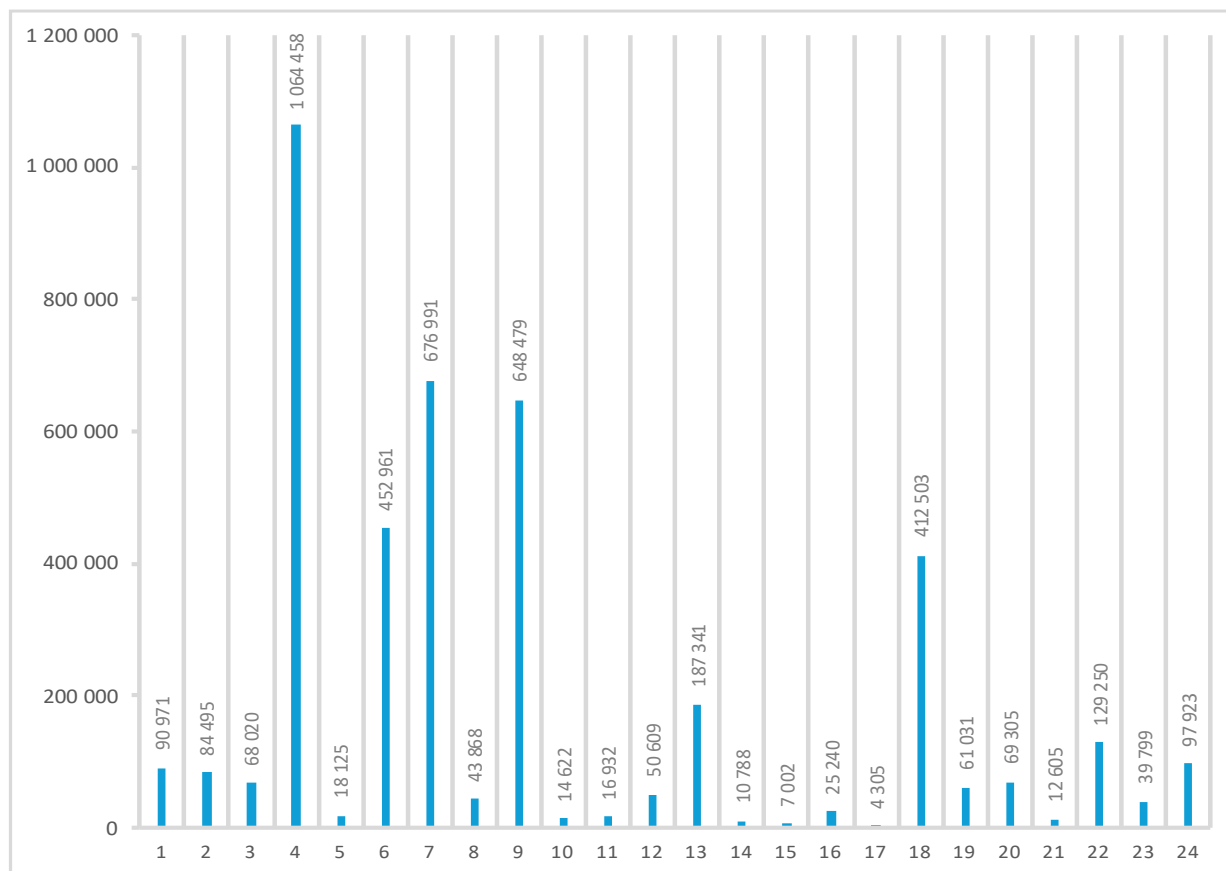
- as the number of people involved in TAW;
- expressed in full-time equivalents;
- as a number of TAW assignments (multiple assignments by one person possible);
- some combination of / with no distinction between all the above.

This has consequences for differences in reporting, which is important to note. In this study, national correspondents most commonly reported the number of people involved in TAW (see the country pages in Annex 2 for full details).

1.2.1. Statistics on temporary agency work as a form of employment across all sectors: Eurostat EU Labour Force Survey

Data on the overall number and share of TAW workers are available from 24 Member States (no data were available from Bulgaria, Cyprus and Estonia). Between 2021 and 2023, the percentage of TAW workers in the EU, measured as the share of employees who have contracts with a temporary employment agency for their main job, was stable at about 2.5 % on average (see Table 5). The most recent data (2023) indicate a level of 2.4 %. In terms of absolute numbers, more than 4.2 million workers were employed through a TWA in 2021. The six Member States with the highest absolute numbers of TAW workers in 2021 were Germany (more than 1 million), Spain (676 991), France (648 479), Greece (452 961), the Netherlands (412 503) and Italy (187 341). These are also the Member States with the highest shares of TAW workers at the EU level (as a share of the EU workforce). The Member States with the lowest absolute numbers of TAW workers were Luxembourg (about 7 000) and Malta (4 305) (see Figure 3).

Figure 3: Number of temporary employment agency workers in each Member State, 2021 (absolute numbers)



Notes: All Member States report a break in the time series for data in 2021. No data available from Bulgaria, Cyprus or Estonia. Total number for 24 Member States with data available: **4 290 110**.

Source: Eurostat, 2024, variable TEMPAGCY (data provided on request).

However, when considering these numbers in the context of national employment in 2021, Greece stands out with a particularly high share of 16.3 % for TAW workers ⁽⁷⁾. In 2023, the Member States with the highest shares of TAW workers were Latvia (6.1 %), Slovakia (5.6 %), Slovenia (5 %), the Netherlands (4.9 %), Ireland (4.6 %) and Spain (4.3 %). In Luxembourg, the official statistics show an unusually high share of TAW workers as a percentage of national employment (97.5 %), suggesting possible measurement errors (see Table 5).

⁽⁷⁾ This unusually high number was adjusted in the following rounds of the EU-LFS updates to 0.4 % (after the break in time series) (August 2025).

Table 5: Number of TAW workers by Member State and by proportions of national and EU workforces, 2021, 2022 and 2023

Member State	Absolute number of TAW workers in 2021 (Eurostat)	TAW workers (% of total employees at the national level in 2021) (Eurostat)	% of total TAW workers at the EU level in 2021 (Eurostat)	TAW workers (% of employed persons working for a TWA in 2022) (EU-LFS)	TAW workers (% of employed persons working for a TWA in 2023) (EU-LFS)
AT	90 971	2.40	2.12	2.4	2.2
BE	84 495	2.04	1.97	1.9	1.4
BG	N.A.	N.A.	N.A.	N.A.	N.A.
CY	N.A.	N.A.	N.A.	N.A.	N.A.
CZ	68 020	1.57	1.59	2.3	1.4
DE	1 064 458	2.83	24.81	3.2	2.8
DK	18 125	0.69	0.42	0.6	0.6
EE	N.A.	N.A.	N.A.	N.A.	N.A.
EL	452 961	16.3 ^(a)	10.56	0.6	0.6
ES	676 991	4.2	15.78	3.9	4.3
FI	43 868	1.98	1.02	2.7	2.5
FR	648 479	2.68	15.12	2.7	2.5
HR	14 622	1.00	0.34	1.3	1.0
HU	16 932	0.42	0.39	0.5	0.5
IE	50 609	2.46	1.18	3.7	4.6
IT	187 341	1.06	4.37	1.0	0.8
LT	10 788	0.89	0.25	0.7	0.8
LU	7 002	2.59	0.16	97.7	97.5
LV	25 240	3.25	0.59	4.8	6.1
MT	4 305	1.8	0.10	3.4	3.6
NL	412 503	5.2	9.62	5.2	4.9
PL	61 031	0.46	1.42	0.4	0.5
PT	69 305	1.8	1.62	1.4	1.3
RO	12 605	0.19	0.29	0.3	0.5
SE	129 250	2.9	3.01	2.8	2.6
SI	39 799	4.76	0.93	5.9	5.0
SK	97 923	4.40	2.28	5.1	5.6
EU-27	4 290 110	2.54	100	2.5	2.4

^(a) This unusually high number was adjusted in the following rounds of the EU-LFS updates to 0.4 % (after the break in time series) (August 2025).

Notes: Calculated shares of TAW workers as a percentage of national employment for 2021 differ slightly from those in dataset lfsa_qoe_4a6r2. The most recent data on percentages of TAW workers (2023) are presented in the last column. Highlighted in yellow are the six Member States with the highest numbers/percentages of TAW workers for each column (except for the last column, where it indicates the top seven to include Luxembourg's extremely high percentage). Importantly, all included Member States report a break in the time series in 2021. N.A. – not available.

Sources: For 2021, own calculations based on Eurostat, variable TEMPAGCY (absolute numbers of TAW workers for 2022 and 2023 were not available); for 2022 and 2023, Eurostat, EU-LFS, 'Temporary employment agency workers by sex, age and NACE Rev. 2 activity' (lfsa_qoe_4a6r2), expressed as a percentage of employed people working for a TWA.

The absolute numbers of TAW workers in 2021 in each Member State presented in Figure 3 may differ from the data collected by the WEC, which conducts a yearly study on the economic and social indicators of the agency work industry and other human resources services and publishes the number of TAW workers as a total headcount / number of placements (WEC, 2024; uses 2022 data).

Table 6 present data on the number of people employed in the TAW sector, which were collected for this representativeness study by the Network of Eurofound Correspondents. When these national data are compared with those from Eurostat, many differences in estimates are identified ⁽⁸⁾, in terms of both overestimating and underestimating the numbers of TAW workers in the national employment numbers. The table shows three comparisons of data: first, a comparison between the national data estimates by the Network of Eurofound Correspondents and the absolute numbers from Eurostat (comparison I); second, a comparison between the proportion of TAW workers as a share of national employment calculated by the Network of Eurofound Correspondents and the share of TAW workers in national employment numbers calculated by Eurostat (comparison II); and, third, a comparison of three data sources on the total number of workers in the EU (comparison III).

Comparison I shows that the national data on the absolute number of workers in TAW differ substantially from the Eurostat data in some Member States. The majority of Member States with information available (16 out of 24) report higher numbers of TAW workers; smaller numbers are reported in 8 Member States. In Belgium, national statistics report close to 700 000 TAW workers, while Eurostat reports approximately 84 000 TAW workers. Similarly, in Hungary, national data ⁽⁹⁾ give a number that is significantly higher (approximately 218 00) than that reported by Eurostat (approximately 17 000). Importantly, regarding the Eurostat data, all Member States report a break in the time series for 2021, which may partially explain the discrepancies.

Comparison II shows similar differences between the estimates from the two sources. To provide a broader picture, the table presents the share of TAW workers in national employment for three points in time (2021, 2022 and 2023). National data provided by the Network of Eurofound Correspondents in 12 Member States provide higher percentages of TAW workers than the Eurostat data, although the magnitude of these differences is much smaller than in comparison I. The most significant difference is in Belgium, with an estimated 14.2 % of the national workforce employed in the TAW sector based on the Network of Eurofound Correspondents data compared with 1.4 % (for 2023) based on Eurostat data.

The overall number of TAW workers differs depending on the source, with 3 522 789 reported based on the SBS but 4 290 110 according to EU-LFS data (data provided on request). Note that the SBS shows 1 million fewer people employed in TAW than the EU-LFS (comparison III). The national data collected for this report suggest that significantly more people are TAW workers, at over 6.5 million (Table 6). This highlights a cross-cutting issue in the economic and labour market assessment of TAW: a lack of reliable and comparable data.

Since the ESSDC for TAW refers not to the NACE codes but to the form of employment in accordance with the Directive on TAW (see European Commission, undated), this **study will primarily refer to the**

⁽⁸⁾ It is important to mention that the Eurostat data are based on the official data provided by the Member States; however, in this exercise, they are compared with the best estimates provided by the Network of Eurofound Correspondents. Often, those estimates are based on the official statistics but, sometimes, they come from secondary sources and are not adjusted for comparative purposes. The discrepancies also partly stem from different methodologies for reporting the number of TAW workers (full-time equivalents, number of contracts, number of workers, etc.).

⁽⁹⁾ Provided by the National Employment Service. See the country pages in Annex 2 for a detailed overview for each Member State.

number of TAW workers, treating TAW as a form of employment, and work with the EU-LFS data, as well as data collected for this study by the Network of Eurofound Correspondents.

Representativeness of the European social partner organisations: Temporary agency work sector

Table 6: Comparisons of statistics from different sources, demonstrating issues when measuring TAW workers

Member State	Comparison I		Comparison II			
	People employed in the TAW sector: national statistics (latest year available ^(a) , Network of Eurofound Correspondents)	Absolute number of TAW workers: Eurostat, EU-LFS (2021 ^(b))	Proportion of national workforce employed in the TAW sector (%) (national statistics, latest year available, Network of Eurofound Correspondents)	TAW workers (% of the total number of employees at the national level) (Eurostat, 2021)	TAW workers (% of employed persons working for a TWA) (Eurostat, EU-LFS, 2022)	TAW workers (% of employed persons working for a TWA) (Eurostat, EU-LFS, 2023)
AT	77 800	90 971	1.80	2.40	2.4	2.2
BE	693 077	84 495	14.20	2.04	1.9	1.4
BG	4 070	N.A.	0.11 (estimate)	N.A.	N.A.	N.A.
CY	240	N.A.	0.04	N.A.	N.A.	N.A.
CZ	271 270	68 020	5	1.57	2.3	1.4
DE	815 880	1 064 458	2.10	2.83	3.2	2.8
DK	35 768	18 125	1	0.69	0.6	0.6
EE	7 177	N.A.	1	N.A.	N.A.	N.A.
EL	15 800	452 961	0.30	16.3	0.6	0.6
ES	807 704	676 991	4.80	4.2	3.9	4.3
FI	62 000	43 868	2.70	1.98	2.7	2.5
FR	787 782	648 479	3	2.68	2.7	2.5
HR	13 081	14 622	1.20	1.00	1.3	1
HU	217 707	16 932	4.70	0.42	0.5	0.5
IE	76 700	50 609	3	2.46	3.7	4.6
IT	515 000 (monthly average)	187 341	2.20	1.06	1	0.8
LT	9 392	10 788	0.70	0.89	0.7	0.8
LU	11 473	7 002	1.53	2.59	97.7	97.5
LV	2 391	25 240	N.A.	3.25	4.8	6.1
MT	9 111	4 305	3.2 (underestimated)	1.8	3.4	3.6
NL	915 000	412 503	10 (estimate)	5.2	5.2	4.9

Representativeness of the European social partner organisations: Temporary agency work sector

PL	700 138	61 031	0.40	0.46	0.4	0.5
PT	300 000	69 305	5.9 (estimate)	1.8	1.4	1.3
RO	43 569	12 605	0.58	0.19	0.3	0.5
SE	85 250	129 250	2.90	2.9	2.8	2.6
SI	18 239	39 799	3.50	4.76	5.9	5
SK	46 563	97 923	1.80	4.40	5.1	5.6
EU-27: sum	6 542 182	4 287 623				
EU-27: EU-LFS official	4 290 110	Comparison III				
EU-27: SBS, NACE 78.2	3 522 789					

^(a) Reference years provided by the Network of Eurofound Correspondents for the number of TAW workers are as follows: 2020 for Greece and Slovenia; 2021 for Belgium, Bulgaria, Croatia, Czechia, Denmark, Germany, Hungary, Ireland, Latvia, Lithuania, Slovakia and Sweden; 2022 for Spain, Italy, Malta, Poland and Romania; and 2023 for Finland, France and Luxembourg. For the EU-27 numbers (comparison III), the sum of rows/numbers for all individual Member States listed differs from the reported total number indicating the count of employees or companies for the EU-27. Therefore, the table provides two rows: one indicating the sum of Member-State-level data (rows) and the other ('EU-LFS official') indicating the total number provided by the source (Eurostat). Ideally, these two numbers should be equal.

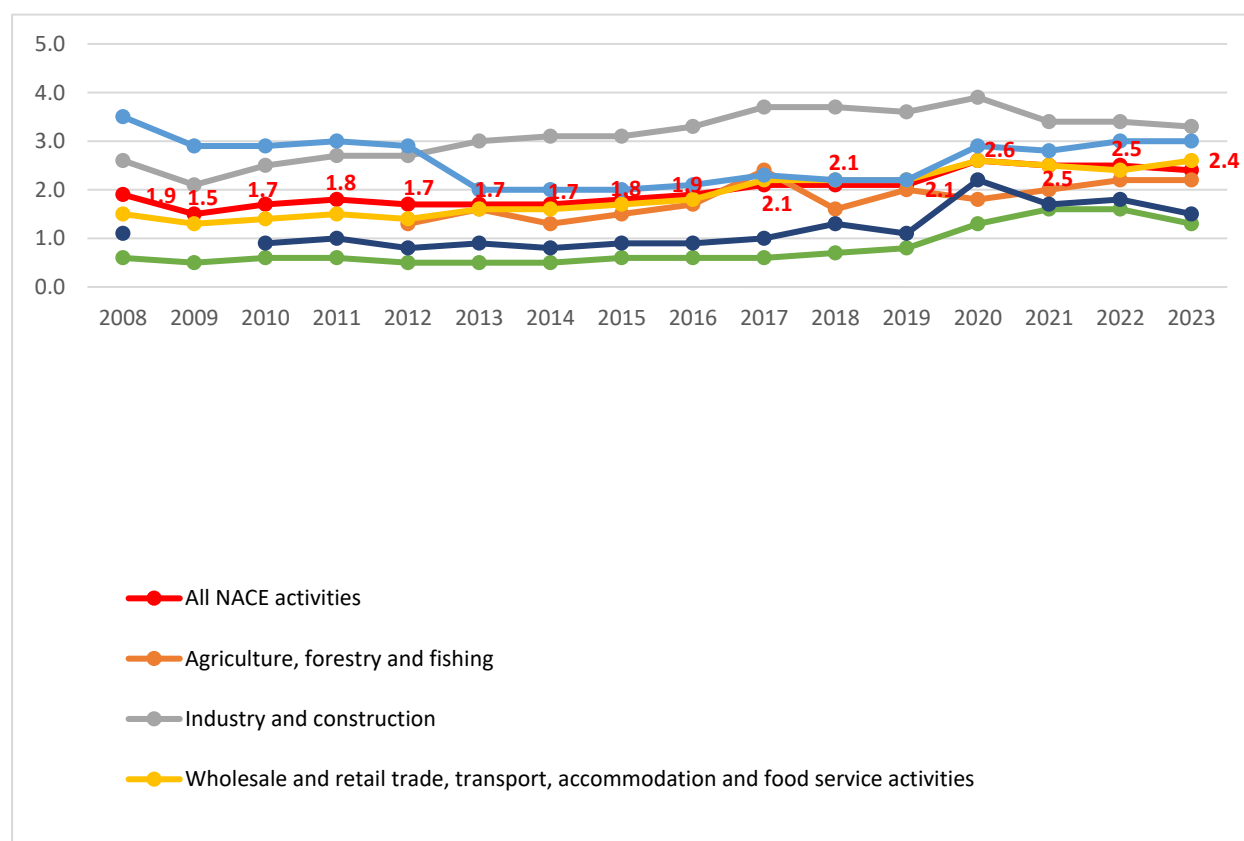
^(b) Importantly, all included Member States report a break in the time series in 2021.

Notes: Fields highlighted in green indicate that the absolute numbers / percentages provided by the national correspondents were higher than the estimates collected at the EU level. Fields highlighted in orange indicate that the absolute numbers / percentages provided by the national correspondents were lower than the estimates collected at the EU level. Comparison III, which breaks down the EU-27 totals by data source, is highlighted in blue to indicate its separation from comparison I.

Sources: Eurostat data on absolute numbers of TAW workers (2021) (data provided on request). Data for 2022 and 2023: Eurostat's EU-LFS, 2022 and 2023; and the Network of Eurofound Correspondents, 2023. The number of TAW workers is based on national responses provided by the Network of Eurofound Correspondents (latest available data: mostly 2021 and 2022). For 24 Member States, data provided by the Network of Eurofound Correspondents were based on the official national statistics. For the other three (Belgium, Italy, the Netherlands), data were provided by representative social partners.

Looking at the development of the numbers of TAW workers by NACE activity ⁽¹⁰⁾ between 2008 and 2023 (Figure 4), the share of TAW workers in all sectors remained relatively stable at between 1.5 % and 2.1 % until 2019, before a slight increase peaking at 2.6 % in 2020, and the most recent level was 2.4 % (2023). The highest share of TAW workers is in industry and construction (3.3 %), followed by the cluster covering information and communication, financial and insurance activities, real estate activities, professional, scientific and technical activities, and administrative and support service activities (3.0 %) (2023). In other words, these two groups are the main industry clusters hiring TAW workers in the EU. The lowest share of TAW workers is in the public sector, which covers education and healthcare, arts and entertainment and some other activities (1.3 %). Over the course of the 16 years displayed in the figure, some clusters of sectors experienced minor fluctuations, but most generally seemed to follow a similar pattern of stability or a slight increase up to 2020, followed by a downturn, probably related to the COVID-19 pandemic.

Figure 4: Temporary employment agency workers (15–64 years) (%), EU-27, by NACE activity cluster, 2008–2023



Note: See Annex 1 for the source table.

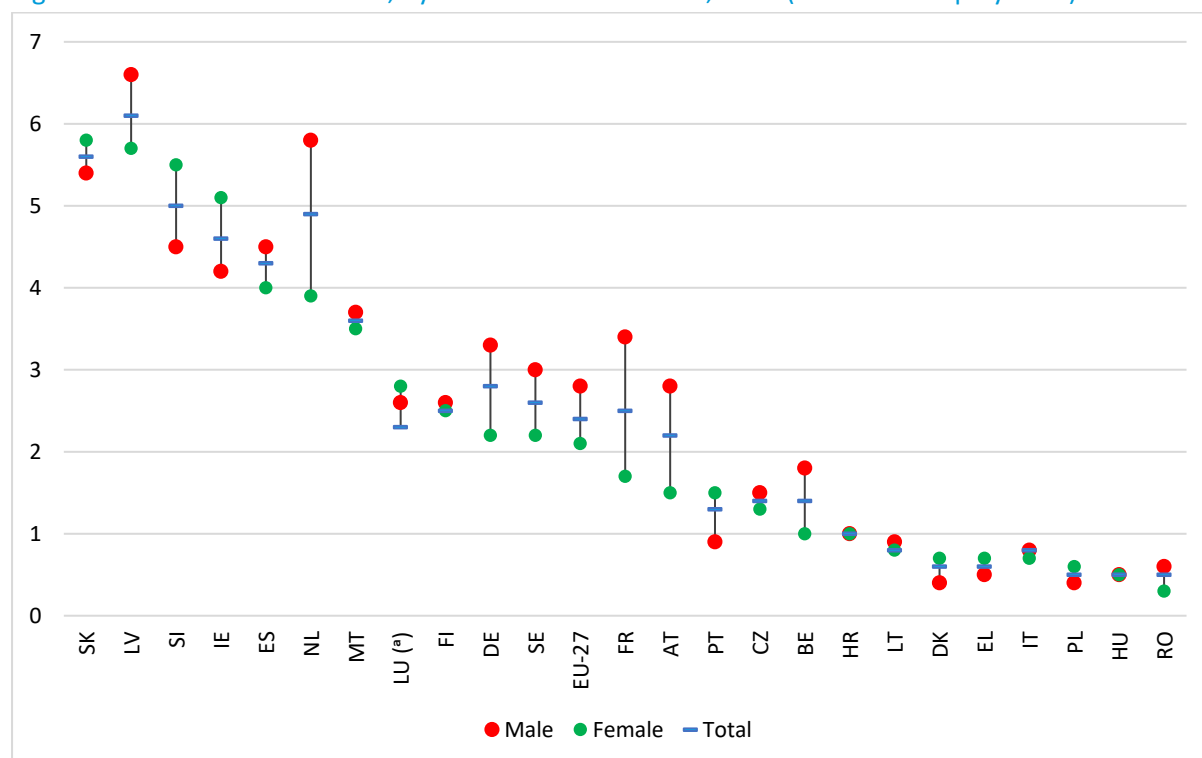
Source: Eurostat, 'Temporary employment agency workers by sex, age and NACE Rev. 2 activity' (Ifsa_qoe_4a6r2).

⁽¹⁰⁾ The shares represent proportions of temporary employment agency workers among the total number of employees in a given NACE (Rev. 2) economic activity. For people with a contract with a temporary employment agency, the economic activity of their local unit is coded as the activity of the local unit where they actually work (not of the agency that employs them). Due to the low reliability, EU-LFS data only allow for an aggregated presentation of sectors.

A large share of TAW workers have a low or medium initial education level, although 26.7 % of workers have completed higher education (IDEA Consult, 2015). According to more recent data from the WEC, on average, 45 % of agency workers around the world have secondary-level education and 33 % have higher education. Available data at the European level suggest a similar trend (WEC, 2024). Information gathered from national TWAs shows that, in most European countries, TAW workers who have completed secondary education make up the largest share. France and Sweden are examples of Member States where this sector is actively engaged in training. In Sweden, the sector is making active reskilling efforts, provided in collaboration with various stakeholders. In France, a sectoral agreement signed in July 2021 mentions four areas of focus and diagnostic tools in the form of studies to assist skills development in relation to emerging sectors (Sectoral Social Dialogue Committee for Temporary Agency Work, 2021).

On average, in the EU, male workers (2.8 %) are more likely than female workers (2.1 %) to work as TAW workers. However, in Slovakia, Slovenia, Ireland, Luxembourg, Portugal, Denmark, Greece and Poland, the share of female TAW workers is higher than the share of male TAW workers. In 14 Member States, male workers are more likely to work as TAW workers (see Figure 5).

Figure 5: Share of TAW workers, by sex and Member State, 2023 (% of total employment)



(a) For Luxembourg, data from 2021 were used instead of data for 2023, as the reported values for the latest available years (2022 and 2023) were unusually high (97.7 % and 97.5 %, respectively).

Notes: Data were not available on TAW workers in Bulgaria, Cyprus and Estonia due to low reliability. Reported data on male workers were of low reliability in Croatia and Romania. Reported data on female workers were of low reliability in Croatia and Greece.

Source: Eurostat, 'Temporary agency workers by sex, age and NACE Rev. 2 activity' (Ifsa_qoe_4a6r2).

1.2.2. Statistics on economic activity

This subsection presents data on TAW as an economic activity, defined as NACE 78.2 – Temporary employment agency activities. These statistics are important for the identification of TWAs in the sector. However, in terms of workforce, they cover all types of employees active in the sector, including the internal staff directly employed by TWAs ⁽¹¹⁾.

Table 7 presents the development of the number of temporary employment agency employees in the sector between 2011 and 2021 (the most recent year available). **Eurostat's SBS data reveal that more than 3.5 million employees were active in TAW as a sector in 2021.** The six Member States with the highest numbers of employees are France, Germany, the Netherlands, Italy, Spain and Belgium. Given that, in some Member States, employees can have permanent contracts with a TWA (allowing them to obtain payment between assignments), be registered with different TWA employers and be a TAW employee for more than one employer, TAW employees may be counted several times in the statistics. Therefore, the numbers need to be handled with caution. In addition, the statistics include the internal staff of TWAs, as mentioned earlier. According to the WEC's economic report, the number of internal staff of private employment agencies in Europe (which includes all those covered by NACE 78) was 676 687 in 2021 (WEC, 2023).

Table 7: Number of employees in NACE 78.2 – Temporary employment agency activities, by Member State, 2011–2021

Member State	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
AT	72 526	69 763	64 650	64 030	62 757	64 316	74 963	78 252	77 302	68 127	73 572
BE	127 754	122 706	128 101	140 894	146 928	151 077	159 695	163 586	166 366	139 965	161 737
BG	1 420	1 688	2 706	3 477	4 048	3 891	4 383	4 507	4 390	3 208	4 045
CY	834	612	670	657	673	506	387	379	398	325	349
CZ	N.D.	N.D.	N.D.	53 855	63 940	69 500	72 292	76 033	73 041	63 507	64 832
DE	796 601	770 060	774 305	803 309	807 517	863 249	867 857	748 447	750 106	615 325	706 647
DK	19 029	19 889	22 446	25 401	27 714	39 069	41 673	45 635	42 870	43 371	46 295
EE	5 769	5 715	6 218	6 767	5 522	6 853	7 286	6 825	N.D.	N.D.	8 491
EL	3 301	584	N.D.	6 842	7 879	12 724	12 589	15 438	18 244	14 087	12 126
ES	153 518	142 584	152 454	157 631	192 076	194 858	217 301	235 470	236 495	211 435	237 426
FI	47 529	47 445	43 668	44 544	46 940	53 196	58 456	61 074	69 954	60 638	62 421
FR	895 389	828 867	718 392	812 742	661 309	N.D.	946 749	940 596	832 200	596 398	771 343
HR	4 505	5 740	5 182	5 683	7 679	9 350	9 931	9 506	8 542	7 080	7 740
HU	44 343	43 136	46 862	56 880	69 043	64 902	66 066	67 697	63 209	52 656	58 381
IE	N.D.	N.D.	N.D.	N.D.	N.D.	N.D.	3 536	3 663	N.D.	4 900	5 752
IT	206 696	192 749	197 428	216 783	252 151	270 786	337 963	379 758	367 586	344 960	428 195
LT	1 528	2 545	3 339	7 613	7 937	8 888	9 355	8 505	9 452	8 797	9 360
LU	11 384	10 365	10 491	10 926	11 999	13 305	13 815	14 513	14 713	11 593	12 986
LV	781	1 208	1 036	1 268	1 310	1 699	1 748	1 956	2 141	2 255	2 257
MT	N.D.	N.D.	N.D.	N.D.	N.D.	N.D.	N.D.	N.D.	1 554	1 418	137
NL	496 238	485 906	474 229	498 363	533 377	567 404	N.D.	657 755	653 088	553 125	526 355
PL	54 810	55 595	64 099	80 960	90 997	99 785	105 428	101 746	91 110	70 909	84 348
PT	81 225	68 529	68 947	75 263	84 529	91 921	100 842	104 073	103 469	83 833	94 428
RO	12 825	16 432	20 605	27 835	34 903	36 795	39 631	38 934	37 878	31 502	33 134

⁽¹¹⁾ In the SBS, the number of employees is defined as those who work for an employer, have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind. A worker from an employment agency is considered an employee of that temporary employment agency and not of the unit (customer) for which they work.

SE	64 243	64 898	63 910	65 954	73 238	78 461	81 542	85 694	87 693	60 444	90 530
SI	6 038	5 372	5 738	10 825	12 532	14 491	16 968	16 702	14 728	12 765	12 422
SK	5 360	6 139	5 768	6 575	8 266	9 087	7 357	8 468	6 309	5 521	7 480
EU-27	3 000 000	3 014 056	2 934 587	3 190 227	3 221 437	3 591 946	3 880 000	3 880 000	3 700 000	3 074 844	3 522 789

Notes: Data show the number of employees. Data are published without their flagged status, indicating a break in the time series, different definitions, estimated and provisional data or low reliability. Highlighted in yellow are the six Member States with the highest numbers of TAW workers for 2021. The EU-27 total is the total reported by SBS data and not the sum of the rows above. N.D.; no data.

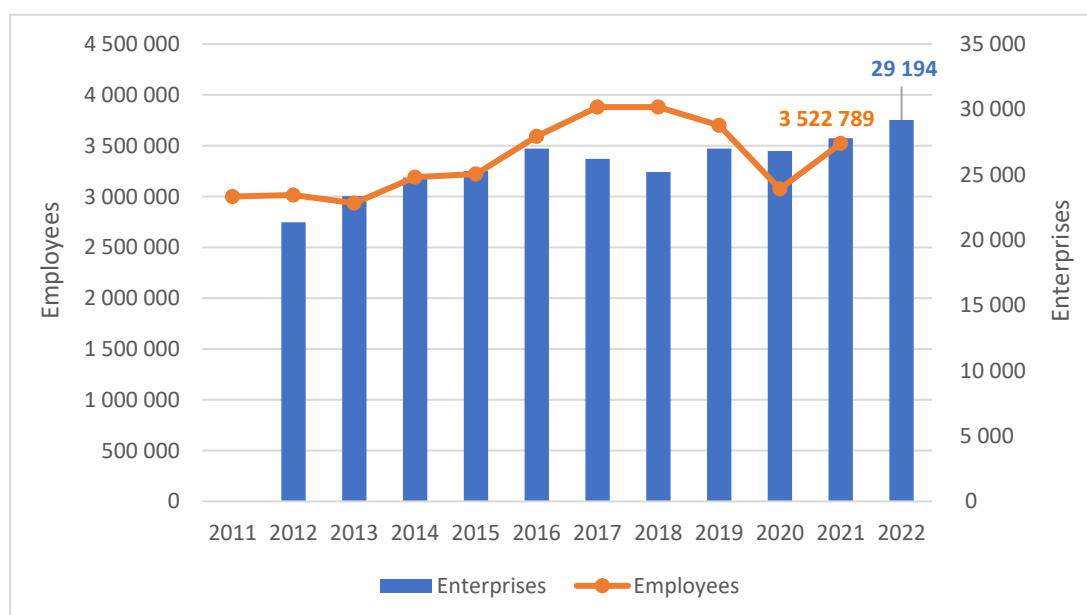
Sources: Eurostat, SBS (N782 – Temporary employment agency activities): variable sbs_na_1a_se_r2 (for 2011–2020) and variable sbs_sc_oww (for 2021–2022).

1.3. Companies in temporary agency work: temporary work agencies

Despite the triangular relationship between a worker, a TWA and a user company existing across the EU, legal definitions, regulatory forms and labour relations practices differ considerably between Member States.

Data from the SBS reveal that, **in 2022, there were 29 194 companies in NACE 78.2 in the EU; this is the highest number recorded since 2012** (see Figure 6).

Figure 6: Numbers of enterprises and employees in NACE 78.2, EU-27



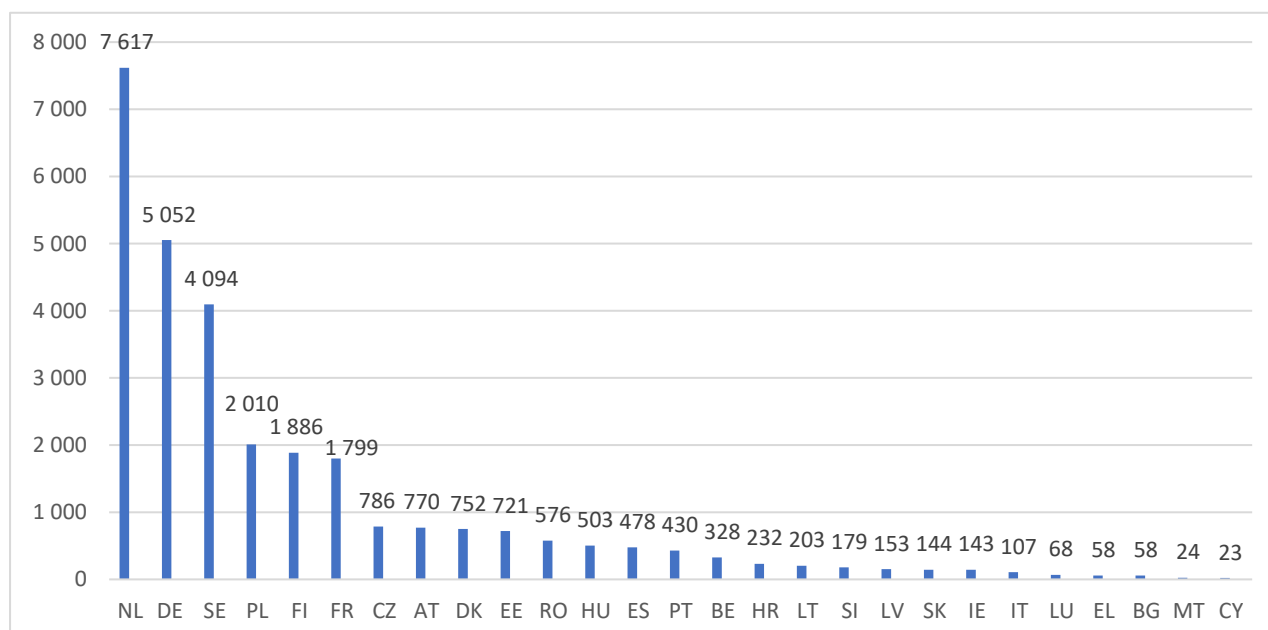
Notes: Data on the number of employees in 2011 and 2019 were of low reliability. Definitions differ for the number of employees in 2017 and 2018 and number of enterprises in 2015 and 2016, and numbers are estimated. For 2019, the number of enterprises is estimated. The 2011 data on the number of enterprises are marked as confidential and have been omitted.

Source: Eurostat, SBS (N782 – Temporary employment agency activities): variable sbs_na_1a_se_r2 (for 2011–2020) and variable sbs_sc_oww (for 2021–2022).

Figure 7 presents the number of enterprises in 2022 in those Member States with available data. The six Member States with the highest numbers of enterprises are the Netherlands (7 617 companies in the sector), Germany (5 052), Sweden (4 094), Poland (2 010), Finland (1 886) and France (1 799). The Member States with only a handful of enterprises are the smallest: Cyprus (only 23) and Malta (24).

Greece (58), Bulgaria (58), Luxembourg (68) and, somewhat surprisingly, Italy (with only 107 registered enterprises) are also among the six Member States with the smallest numbers.

Figure 7: Number of enterprises, by Member State, 2022



Source: Eurostat, SBS (N782 – Temporary employment agency activities): variable sbs_sc_oww (for 2021–2022).

However, in almost all Member States, the data gathered for this representativeness study by the Network of Eurofound Correspondents give different numbers of companies in the TAW sector (see Table 8).

By comparing these data (comparison IV), it becomes clear that 14 Member States report higher numbers of enterprises and 10 Member States report smaller numbers of enterprises than those reported in the SBS. In some Member States, such as Germany, the difference is significant (47 769 versus 5 052) and may stem from the fact that TWAs are often companies involved in all employment activities (NACE 78). As will become clear in Chapter 2 on national representation, the employer organisations in Germany claim to represent more enterprises than reported in the SBS data. Similarly, the numbers of companies in France and the Netherlands are reported to be significantly higher than those in the official (although provisional) statistics. Of the Member States with the smallest numbers of enterprises reported by the SBS, the Network of Eurofound Correspondents reports even smaller numbers of companies in Cyprus, Greece and Luxembourg. Overall, the total number of companies reported by the Network of Eurofound Correspondents is also significantly higher than that reported by the SBS: 90 861 companies versus 29 194, respectively.

Table 8: Comparison of statistics from different sources, demonstrating issues when measuring TWAs

Member State	Comparison IV: number of TWAs	
	National statistics (Network of Eurofound Correspondents, 2023)	SBS, 2022
AT	759	770
BE	N.A.	328
BG	62 (no data on multinational companies)	58
CY	19	23
CZ	1 113	786
DE	47 769	5 052
DK	1 090	752
EE	620	721
EL	44	58
ES	244	478
FI	1 745	1 886
FR	8 375	1 799
HR	292	232
HU	580	503
IE	450	143
IT	137	107
LT	193	203
LU	59	68
LV	175	153
MT	N.A.	24
NL	16 920	7 617
PL	3 611	2 010
PT	380	430
RO	787	576
SE	4 964	4 094
SI	140	179
SK	333	144
EU-27 (sum)	90 861	29 194

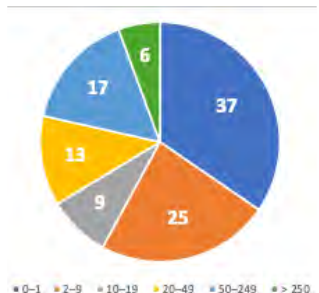
Notes: Fields highlighted in green indicate that the absolute numbers provided by the national correspondents were higher than the estimates collected at the EU level. Fields highlighted in red indicate that the absolute numbers provided by the national correspondents were lower than the estimates collected at the EU level. For the full country profiles, see Annex 2.

Sources: SBS, 2022, and Network of Eurofound Correspondents, 2023. Number of TWAs (enterprises) based on national responses provided by the Network of Eurofound Correspondents (latest available data – mostly 2021 and 2022). For 24 Member States, data from the Network of Eurofound Correspondents are based on the official national statistics. For three Member States, data were provided by representative social partners (Belgium, Italy, the Netherlands).

Data from the SBS reveal that, in 2022, microcompanies had the highest share among enterprises active in all NACE 78.2 activities in the EU. The company distribution by size class shows a significant concentration of one-person companies with zero employees or one employee in the TWA activities sector across the EU, covering 37 % of the total companies. A quarter of the companies have between two and nine employees (25 %). This means that the majority of companies in the sector are microcompanies and small businesses, with 0–9 employees. Only 6 % of companies have 250 or more employees (see Table 9). This variation is because companies in this sector include both well-known multinational companies (Randstad, Adecco, Manpower) and very small, owner-operated businesses.

Table 9: Enterprise statistics by size class and NACE (Rev. 2) activity, 2022

Size group (people employed)	0–1	2–9	10–19	20–49	50–249	≥ 250	All	Percentage by size class
%	37	25	9	13	17	6	100	
Absolute number	10 100	6 767	2 575	3 600	4 563	1 570	27 605	



Notes: All data are provisional. The total official number of enterprises is 29 194, which is not equal to the sum of enterprises per each size class (27 605). Number for class size 20–49 is estimated.

Source: Eurostat, SBS.

In a traditional representativeness study based on clear NACE code demarcation, it would be critical to show how many employees are employed in each type of companies to understand the dynamics in the sector and identify any potential prevalence of the workforce in one type of a company – for example, large companies. However, this distinction is less relevant to this representativeness study, which looks at a form of employment, simply because not all employees covered by NACE 78.2 are TAW workers.

Nevertheless, the data available from the SBS show that, of the estimated 3 600 000 people employed in NACE 78.2 in 2022 (note that this number differs from the number of ‘employees’ in NACE 78.2, which is 3 522 789), the majority (81 % or 2 927 122) worked in large companies (those with more than 250 employees) ⁽¹²⁾.

The numbers and categories of employees and the numbers and types of companies described above help distinguish the differences in approaches to organising (and representing) different kinds of TWAs and companies, which are analysed in the next chapter.

⁽¹²⁾ See Eurostat, SBS, variable sbs_sc_oww, for the numbers of people employed in each of the size classes.

2. National level of interest representation

This chapter provides a panoramic overview of the national levels of interest representation and provides the total numbers of trade unions and employer organisations / business associations that will form the basis of the representativeness calculations in the next chapter.

This study identified 67 trade unions and 39 employer organisations and business associations in the TAW sector (see Table 10). Since the previous representativeness study, conducted in 2016, there has been a slight increase in trade union representation, from 59 to 67 unions, and a slight decrease in employer representation, from 40 to 39 organisations. However, these numbers need to be interpreted in the context of structural and organisational changes ⁽¹³⁾ and the improved reporting methodology of this study (see Box 3). Sections 2.1 and 2.2 provide an overview of these developments for trade unions and employer organisations / business associations, respectively.

Table 10: Numbers of national-level trade unions and employer organisations / business associations in the TAW sector, by Member State

Trade unions												Member State	Employer organisations / business associations						
												2	AT	2					
												12	BE	2					
												1	BG	2					
												0	CY	0					
												3	CZ	2					
												3	DE ^(a)	2					
												3	DK	3					
												0	EE	1					
												0	EL	1					
												3	ES	1					
												3	FI	2					
												6	FR	1					
												0	HR	1					
												2	HU	2					
												1	IE	1					
												6	IT	2					
												0	LT	1					
												2	LU	1					
												1	LV	1					
												2	MT	2					
												3	NL	2					
												1	PL	2					

⁽¹³⁾ These include internal reorganisations / mergers of employer organisations.

[illegible]

(a) In Germany, two employer organisations initiated a merger in 2023, which was completed in December 2023. As the data for this study were collected prior to this merger, they are presented separately for the two organisations.

Note: Member States with no representation are highlighted in orange.

Source: Network of Eurofound Correspondents, 2023.

In 21 Member States, there is at least one trade union organising or representing TAW workers; 26 Member States have at least one employer organisation / business association. In total, 6 of the 27 Member States – namely Croatia, Cyprus, Estonia, Greece, Lithuania and Romania – have no trade union representation for TAW workers. Cyprus is the only Member State where employers are not organised in any employer organisation / business association for TWAs. This highlights a notable disparity in the organisation of the sector: employers are organised in more Member States than workers are.

While, on the trade union side, there is a dispersion of worker representation across more than one organisation, on the employer side, employers in 14 Member States are mainly represented by just one employer organisation / business association. Furthermore, 11 Member States have two employer organisations / business associations, while only Denmark has three employer organisations / business associations for TWAs.

2.1. National trade unions in the temporary agency work sector

Overall, **67 TAW sector trade unions** were identified across **21 Member States** in 2023 (see Table 11). Although this represents an increase since the 2016 representativeness study, which reported 59 trade unions, a detailed analysis reveals that this increase can be largely attributed to differences in reporting (Belgium, Czechia, France) or the inclusion of additional trade unions due to their affiliation to the European trade union (Italy). Table 11 presents a comparison between the two studies in terms of changes in the numbers of trade unions in the TAW sector.

Table 11: Numbers of national trade unions in the TAW sector, by Member State, 2023 and 2016

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
TUs (2023)	2	12	1	0	3	3	3	0	0	3	3	6	0	2
TUs (2016)	2	4	1	0	1	5	4	0	0	2	4	5	0	1
	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	EU
TUs (2023)	1	6 ^(a)	0	2	1	2	3	1	3	0	8	1	1	67
TUs (2016)	2	3	0	2	1	2	4	3	3	0	8	1	1	59 ^(b)

^(a) In Italy, the increase in the number of trade unions is due to the inclusion of three trade unions representing workers directly employed by temporary agencies (see Box 3 for more information).

^(b) In the 2016 study, the overall number of trade unions included three unions from the United Kingdom and thus the overall number was 62.

Notes: TU, trade union. The red values indicate differences between the findings for 2016 and 2023. Orange shading indicates Member States with no TUs.

Sources: Own calculations, 2023, and Eurofound, 2016.

The overall increase in the number of trade unions must be interpreted with caution. First, if the reported overall number of trade unions was the same in 2023 and 2016, this does not indicate that the same organisations are covered in both studies. This is, for example, the case in Sweden, where the eight listed unions are different in the 2016 and 2023 representativeness studies. Second, as indicated above, some of the changes in numbers can be attributed to the improved reporting of relevant trade unions in the TAW sector. Third, as this representativeness study counts not the social partners active in just one NACE code, as is the case in traditional representativeness studies, but rather those representing workers in a certain form of employment, some omissions may have happened due to the methodological approach to reporting the most relevant social partners in TAW. For a more detailed overview of the changes in select Member States, see Box 3.

Box 3: Changes in the numbers of trade unions between the 2016 and 2023 TAW representativeness studies, by Member States

Belgium. The increase in the number of trade unions is due to the change in reporting. In the 2016 representativeness study, only confederations were reported, with three representative trade union confederations at this level: ABVV-FGTB, ACV-CSC and ACLVB-CGSLB. In this study, all relevant sectoral federations are listed.

Czechia. All three trade unions reported in Czechia are company-level unions within one company, which were grouped as one organisation in the previous study.

Denmark. Since there are no TAW-specific trade unions in Denmark, most trade unions have some TAW workers among their members and are thus relevant. In line with the methodological guidelines, the three largest trade unions were included in the study. Note that, according to the national data, TAW workers sell the highest number of annual hours to the human health / hospitals sector

(31.15 %). Two trade unions organising TAW workers in this sector, Danish Nurses' Organization (Dansk Sygeplejeråd (DSR)) and Trade and Labour (Fag og Arbejde (FOA)), were not included in this study due to the lack of available information and data.

Finland. The 2016 TAW representativeness study mentions four relevant trade unions: PAM, Metalliliitto, ERTO and TEAM-liitto. Two of those, however, do not exist any more. Metalliliitto is now Teollisuusliitto, and TEAM-liitto is now part of Teollisuusliitto.

France. Similarly to the Belgian case, the change in unions listed relates to more detailed reporting. Namely, instead of focusing on the umbrella organisation FNECS, the report focuses on its relevant suborganisation: CFE-CGC FNECS (SNES). In addition, one organisation previously not included was added (UNSA FCS).

Germany. This study only reports sectoral trade unions, unlike the previous study, where the umbrella organisation German Trade Union Confederation (Deutscher Gewerkschaftsbund (DGB)) was reported separately. The following trade unions also represent some TAW workers in Germany but, due to the lack of data, are not included in the study: Gewerkschaft Erziehung und Wissenschaft (GEW); Industriegewerkschaft Bauen-Agrar-Umwelt (IG BAU); Gewerkschaft der Polizei (GdP); Eisenbahn- und Verkehrsgewerkschaft (EVG); and Gewerkschaft Nahrung-Genuss-Gaststätten (NGG).

Hungary. One sectoral federation whose member unions are organised in companies that employ TAW workers was added: the Trade Union of Mine, Energy and Industrial Workers (BDSZ).

Ireland. The change was a reduction to only one union, as the second one previously listed – CWU – has no members among TAW workers.

Italy. There was an increase in the number of relevant trade unions as a result of the bottom-up and top-down approaches of the representativeness study ⁽¹⁴⁾. Although the number of trade unions with TAW members remained the same (three, using the bottom-up approach), three unions that organise the employees of temporary agencies (directly employed workers) – FILCAMS CGIL, FIST CISL and UILTuCS – were added to the study because they are affiliated to UNI Europa Agency Workers and are therefore represented on the ESSDC for TAW (top-down approach).

Netherlands. The union previously listed, LBV, is not included in this study because of the lack of available data / responses. Nevertheless, according to the expert assessment, the union plays virtually no role in the sector (it is not listed as a signatory party in the collective bargaining agreements).

Poland. Only one trade union, Solidarność, is included in the study (a member of UNI Europa Agency Workers). Two previously listed trade unions are not included in the recent version due to a lack of information on their structures.

Portugal. The overall number of trade unions remained the same but, due to organisational changes, there is one new trade union listed: SITESE. Several trade unions united under the Federation of Unions of Office and Service Workers (FETESE), at that time dominated by SITESE, signed a multi-

⁽¹⁴⁾ To recap, representativeness studies combine top-down and bottom-up approaches. The top-down approach covers all sector-related affiliates of UNI Europa Agency Workers and WEC-Europe, while the bottom-up approach looks at the organisations organising employees or employers and/or involved in sector-related collective bargaining and social dialogue in the Member States and their membership of European-level organisations.

employer open-ended collective agreement for TAW workers in 1989, which still covers a significant number of TAW workers. SITESE has since chosen to separate from FETESE, which has lost its significance in the TAW sector and is not included in the study.

Spain. Three trade unions are included in the study, but the largest one refused to participate in the research.

Sweden. Although the number of reported trade union is the same in both representativeness studies (8), the lists of organisations differ. Six unions conclude five collective labour agreements (CLAs) related to TAW workers: (i) white-collar CLA – Unionen and AHT, which consist of 15 independent unions; (ii) blue-collar CLA – LO, which consists of 14 unions that also sign the agreement independently; (iii) TAW CLA for teachers – Sveriges Lärare; (iv) TAW CLA for doctors – Sveriges Läkarförbund; and (v) TAW CLA for nurses – Vårdförbundet. Two unions are members of umbrella organisations that negotiate on their behalf: SEKO is a member of LO and Sverige Ingenjörer is a member of AHT. As these two unions are listed as members of UNI Europa Agency Workers, they have been listed separately (see Table 11).

For a detailed overview of country-specific trade union representation, see the country pages in Annex 2.

Source: Network of Eurofound Correspondents, 2023.

The development of the number of national trade unions involved in representing TAW workers has been mixed, with higher numbers for some Member States and reduced numbers for others, while numbers for some remained unchanged. First, the number of trade unions in the TAW sector increased in six Member States: Belgium, Czechia, France, Hungary, Italy and Spain. However, as can be seen from Box 3, the increase in Belgium and Czechia is only due to the difference in reporting. In Italy (+ 3), the increase is a result of the inclusion of trade unions representing mostly directly employed workers of TWAs that are, however, affiliated to UNI Europa Agency Workers. Nevertheless, in Hungary (+ 1) and Spain (+ 1), the new trade unions listed are examples of real increases in union organisation and representation.

Second, in four Member States, namely Denmark, Finland, Germany and Ireland, the numbers of trade unions covering TAW decreased, which may be testimony to the challenge this sector represents in terms of trade union organisation. This is the case in Ireland (– 1), where only one trade union was identified compared with the two previously noted as organising and representing TAW workers. In the other three Member States, the drops are related to structural and organisational changes. Meanwhile, in the Netherlands and Poland, the drops can be attributed to the lack of available data and/or willingness to participate in the study.

Third, the number of national trade unions in TAW remained unchanged in nine Member States: Austria, Bulgaria, Latvia, Luxembourg, Malta, Portugal, Slovakia, Slovenia and Sweden. This, however, does not imply no change in terms of representation; while the numbers might be stable, there might be changes in the landscape of national sector representation, where one trade union is replaced by another.

Importantly, in six Member States (Croatia, Cyprus, Estonia, Greece, Lithuania and Romania), workers in the TAW sector are not represented by any trade union. As summarised in Table 12, the Network

of Eurofound Correspondents estimates that the number of workers in six Member States with no national-level representation equals about 1 % of the entire EU TAW workforce. This increases significantly when looking at the data from Eurostat (EU-LFS). Data for 2022 and 2023 (which, however, do not include Cyprus and Estonia in calculations where data are not available) show smaller intervals and indicate that the number of workers with no trade union representation ranges from 0.3 % in Romania to 1.3 % in Croatia, which may be more realistic. Nevertheless, based on the source of data for calculations of the overall number of TAW workers, **between 1 % and 11.0 % of EU TAW workers are not represented by any trade union at the national level, and hence are also not represented at the EU level.**

Table 12: Number of workers not represented by any trade union in the TAW sector, by data source

Member State	People employed in the TAW sector: national statistics (latest year available ^(a)), Network of Eurofound Correspondents)	Absolute number of TAW workers (2021): Eurostat, EU-LFS	TAW workers (% of total number of employees at the national level) (Eurostat, 2021)	TAW workers (% of total number of employees at the EU-27 level) (Eurostat, 2021)	TAW workers (% of employed persons working for a TWA) (Eurostat, EU-LFS, 2022)	TAW workers (% of employed persons working for a TWA) (Eurostat, EU-LFS, 2023)
CY	240	N.A.	N.A.	N.A.	N.A.	N.A.
EE	7 177	N.A.	N.A.	N.A.	N.A.	N.A.
EL	15 800	452 961	16.3 ^(b)	10.56	0.60	0.60
HR	18 256	14 622	1.00	0.34	1.30	1.00
LT	9 392	10 788	0.89	0.25	0.70	0.80
RO	39 307	12 605	0.19	0.29	0.30	0.50
Total for six Member States	90 172	490 976		/		
EU-27	6 543 095	4 290 110	2.54	100	2.50	2.40
Total % of EU workers with no representation at the national level (six Member States)	1.00	11.00	/	/	/	/

^(a) Years are as follows: Croatia, 2021; Cyprus, 2020; Estonia, 2022; Greece, 2022; Lithuania, 2021; Romania, 2021.

^(b) This unusually high number was adjusted in the following rounds of the EU-LFS updates to 0.4 % (after the break in time series) (August 2025).

Sources: Table 5, Table 6 and own calculations.

2.1.1. Sector-relatedness, coverage and organisational density of trade unions

This subsection looks at three aspects of trade union representation: their sector-relatedness, their coverage and their organisational density.

2.1.1.1. Domain patterns of trade union representation in the temporary agency work sector and their sector-relatedness

There are several specific characteristics related to the types of union representation in the TAW sector, which stem from the fact that **TAW can be both a type of employment and a type of activity** demarcated by the NACE code.

This study identifies three types of union representation.

1. **TAW-specific unions.** These are specific unions organising only TAW workers. An example is a union organising TAW workers, who can join regardless of the sector in which they work.
2. **General unions organising all workers, including TAW workers.** These are trade unions organising TAW workers across all sectors of the economy. An example is a cross-sectoral, general trade union for all employees, including TAW workers.
3. **Sectoral unions organising all workers, including TAW workers.** These are non-TAW-specific, sectoral unions with some members who are TAW workers. For instance, a metalworker union with regular employees as members could also have some members who are TAW workers.

Depending on how the sector is defined, trade unions can represent all of the sector's members, TAW included. In collective bargaining, collective agreements negotiated by these trade unions also cover TAW workers. This is the case for all sectoral unions that have TAW workers as their members. These sectoral unions represent the interests of not only TAW workers, but all sectoral workers affiliated to the union.

This categorisation is closely related to the assessment of the sector-relatedness of trade unions, which assesses whether a trade union has members in other sectors of the economy. Based on this, a trade union is categorised as being congruent with the sector or as having an overlapping, sectional or sectional overlapping membership domain (see Table 3 and Figure 1 for definitions). The overlapping domains indicate links with other sectors, while sectionalism might contribute to fragmentation (if different trade unions cover different parts of the sector) or pluralism (if different trade unions have similar memberships). Other factors include organisational density, whether all categories of employees are covered, whether employees from all sizes of companies are covered and whether employees in all parts of the Member State can be part of the trade union.

In line with the 2016 representativeness study, which pointed to the stability of trade unions (or a lack of development), only two unions from France – CGT Intérim and FEC FO – have a domain pattern of congruence, organising TAW workers across all sectors of the economy (see Table 13). In other words, TAW-specific trade unions – meaning those that specifically organise TAW workers – exist only in France. All other trade unions fall under the domain pattern categories of overlap or sectional overlap. The domain pattern of overlap is mostly present in Member States with general trade unions, while Member States with sectoral unions more commonly fall under the category of sectional overlap. In some Member States, there are specific trade unions for the directly employed staff of employment agencies, such as FILCAMS CGIL or Uiltemp in Italy, whose domains overlap with the scope of this study; however, they do not necessarily represent TAW workers.

Table 13: Domain pattern of national trade unions, by Member State

Domain pattern	National trade unions
Congruence (TAW-specific unions)	CGT Intérim (FR), FEC FO (FR)
Overlap (general unions)	GPA (AT), PRO-GE (AT), ACLVB-CGSLB (BE), ACV-CSC Puls (BE), ACV-CSC CNE (BE), ABVV-FGTB BBTK-SETCA (BE), CITUB (BG), HK Privat (DK), FS-CFDT (FR), CFTC – CSFV (FR), CFE-CGC SNES (FR), UNSA FCS (FR), SIPTU (IE), FILCAMS CGIL (IT), UILTuCS (IT), FELSA CISL (IT), FIST CISL (IT), NIDIL CGIL (IT) ^(a) , Uiltemp (IT) ^(a) , OGB-L (LU), GWU (MT), UĦM (MT), FNV (NL), CNV (NL), De Unie (NL) Solidarność (PL), Sinttav (PT), Sindetelco (PT), SITESE (PT), SSS (SI)
Sectionalism	—
Sectional overlap (sectoral unions)	ACV-CSC METEA (BE), ACV-CSC Food and Services (BE), ACV-CSC BIE (BE), ACV-CSC Transcom (BE), ABVV-FGTB Horval (BE), ABVV-FGTB BTB (BE), ABVV-FGTB Metaal (BE), ABVV-FGTB ACCG (BE), KOVO MB (CZ), KOVO KV (CZ), KOVO VL (CZ), IG Metall (DE), ver.di (DE), IG BCE (DE), 3F (DK), DM (DK), Unión y Empleo (ES), CCOO – Servicios (ES), FESMC-UGT (ES), PAM (FI), ERTO (FI), Teollisuusliitto (FI), VASAS (HU), BDSZ (HU), LCGB Services (LU), LKDAF (LV), Unionen (SE), SEKO (SE), LO (SE), AHT (SE), Vårdförbundet (SE), Sveriges Lärare (SE), Sveriges Ingenjörer (SE), Sveriges Läkarförbund (SE), OZ KOVO (SK)

^(a) In Italy, NIDIL CGIL and Uiltemp cover all forms of atypical workers / forms of employment, including TAW, and are thus close to being defined as unions with domains in congruence with the TAW sector. However, they are still listed in the category of unions with an overlapping domain.

Source: Network of Eurofound Correspondents, 2023.

Table 14 presents the sector-relatedness of national trade unions in specific sectors. The traditional formulation of the assessment of sector-relatedness in a representativeness study would be as follows: of all 67 trade unions that organise or represent employees in the sector, between 33 % and 67 % of unions also have members in other sectors of the economy. However, in the case of TAW and its cross-cutting nature, meaning it covers all sectors of the economy, these shares refer to the percentage of trade unions that organise TAW workers in a given sector. Table 14 indicates that the smallest numbers of unions (30 from 10 Member States for each) organise TAW workers in the education and live performance sectors, and the largest numbers of unions organise TAW workers in the manufacturing sector (45 from 15 Member States) and the private services sector (40 from 12 Member States). In general, apart from manufacturing and private services, the organisation of TAW workers in the rest of the sectors is fairly equal, with shares between 45 % and 52 % of all trade unions (see Table 14).

Table 14: Sector-relatedness of all national trade unions organising/representing TAW workers

	Total	Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	Other sectors
Total number of TUs organising TAW	67	32	35	33	30	33	33	34	33	33	32	40	45	31	30	22
% of all TUs	100	48	52	49	45	49	49	51	49	49	48	60	67	46	45	33
Number of Member States with a TU organising TAW	21	11	13	11	10	11	11	11	10	11	11	12	15	11	10	10
Number of Member States with no TU	6															

Notes: TU, trade union. Table gives answers to the question ‘Please indicate in which of the sectors listed below does the trade union organise temporary agency workers in your country.’ For full information, see Annex 1.

Source: Network of Eurofound Correspondents, 2023.

2.1.1.2. Coverage of the national trade union representation in the temporary agency work sector

There are several categories of TAW workers represented by trade unions across the EU. National correspondents were asked to identify membership patterns based on the type of contract, the size of the companies employing TAW workers and the geographical coverage of the unions (see Table 15 and Table 16).

Table 15 shows the number of trade unions in the EU that organise various categories of workers: TAW workers with short-term contracts; the internal staff of the TWAs; and TAW workers who become directly employed, permanent staff of the hiring firm. Only 38 of the 67 trade unions represent TAW workers on short-term contracts, which shows there are potential challenges related to the coordination and representation of TAW workers with (very) short-term contracts. TAW workers with short-term contracts are represented by trade unions in only 9 of the 27 Member States. The representation of the internal staff of TWAs by trade unions is similar, being present in 12 Member States. However, overall, the number of unions representing internal staff is higher: 40 of the 67 unions. In (at least) 18 trade unions from five Member States, once a TAW receives a direct permanent contract with the hiring firm, they need to be affiliated to another trade union (conversion). This would apply, for instance, to a TAW worker from Germany who is working for a TWA with a company

agreement negotiated by ver.di and who is assigned to a car producer where IG Metall organises the workers, such as Brunel. In contrast to this, a Danish worker affiliated to 3F would maintain their membership of the union if the conversion to a permanent work contract takes place within the same sector. In some Member States, such as Belgium, the answer is not straightforward, as all sectoral federations have representation within the TAW sector, so a change of contract would not de facto require a conversion.

Table 15: Categories of workers (type of contract) represented by trade unions in TAW

	TAW workers with short-term contracts	Internal staff of the TWA	TAW workers on a direct permanent contract with the hiring firm need to be affiliated to another TU (number of 'yes' responses)
Number of TUs	38	40	18 (many conditional replies, so more unions could be counted here)
Number of Member States with a TU organising these categories of workers	9	12	5
Member States where there is no TU organising these categories of workers (including Member States with no information/unions and those that refused to cooperate)	BG, CY, CZ, DE, EE, EL, HR, HU, IE, LT, LU, LV, MT, PL, PT, RO, SI, SK (18)	BG, CY, CZ, EE, EL, HR, IE, LT, LU, LV, MT, PL, RO, SI, SK (15)	No need to change affiliation: AT, BG, CY, CZ, DK, EE, EL, FI, HR, HU, IE, IT, LT, LU, LV, MT, NL, PL, PT, RO, SE, SK (22)

Notes: TU, trade union. See Table A2 in Annex 1 for full Member State details.

Source: Network of Eurofound Correspondents, 2023.

The size of the companies – in this case, TWAs – employing TAW workers is another factor influencing the degree (frequency) of trade union representation of TAW workers. The companies facing the largest hurdles to representation in this respect are, unsurprisingly, the smallest enterprises, which employ 1–9 workers: a fairly high number of unions do not cover / have no employees in this size group (26 of 67, or 39 %). The situation improves gradually, with more unions representing TAW workers, as the size of a company increases: 45 of 67 unions represent TAW workers in companies of 10–49 workers, 49 unions represent those in the class of 50–249 workers and 51 unions represent the biggest companies, which employ more than 250 TAW workers (Table 16). In terms of levels of representation, the representation of TAW workers is balanced between trade unions organising workers at the centralised Member State level (61 trade unions in 21 Member States) and those organising through regional substructures (49 trade unions in 15 Member States) (see Table 16).

Table 16: Number of trade unions organising employees, by company size class and geographical coverage

	Size of the TWAs employing organised workers (TAW workers on assignment)				Geographical coverage	
	1–9	10–49	50–249	> 250	Organising entire Member State (number of 'yes' responses)	Regional subdivisions (number of 'yes' responses)
Total number of TUs organising TAW workers	41	45	49	51	61	49
Number of Member States with a TU organising TAW workers	11	14	15	16	21	15
Member States where there is no TU organising TAW workers in this sector (including Member States with no information or that refused to cooperate)	BG, CY, CZ, EE, EL, HR, HU, IE, LT, LV, MT, NL, PL, RO, SI, SK (16)	BG, CY, CZ, EE, EL, HR, HU, IE, LT, LV, PL, RO, SI (13)	BG, CY, CZ, EE, EL, HR, IE, LT, LV, PL, RO, SI (12)	BG, CY, EE, EL, HR, IE, LT, LV, PL, RO, SI (11)	CY, EE, EL, HR, LT, RO (6)	CY, EE, EL, HR, IE, LT, LU, LV, MT, NL, RO, SI (12)

Notes: TU, trade union. The size of the company is reported based on the answers to the question 'Is the TU organising TAW [workers] in all types of TWA? (tick below the type of temporary work agency).' See Table A2 in Annex 1 for full Member State details.

Source: Network of Eurofound Correspondents, 2023.

2.1.1.3. Membership strength and organisational density of national trade union representation in the temporary agency work sector

Overall, 67 trade unions across 21 Member States organise at least 251 896 TAW workers. There are 20 unions with increasing membership, 13 with stable membership, and 3 with decreasing membership. One union is experiencing fluctuating membership. Data on membership trends are either not available or were not disclosed regarding 30 trade unions. In terms of the assessment of relative union size, 13 unions are the largest organisations for TAW workers, 11 are the second largest, and 5 are the third largest. Membership data are missing for 13 unions, while the remaining 25 had no data available, were not among the three largest trade unions or gave other qualitative statements (see Table 17).

Looking deeper at membership within trade unions organising TAW workers, the picture is mixed. First of all, 33 national trade unions did not provide membership data (49 %), which may be explained by objective difficulties in terms of monitoring the number of TAW workers due to, for example, high

rotation. Second, where trade unions did report membership data, it is often unclear whether the predominant pattern of worker representation is representation through the largest or second largest union in the Member State, with only exceptional instances of representation by smaller trade unions.

Despite numerous challenges in organising TAW workers, the dominant trend is an increase in the number of trade union members, as reported by 20 trade unions, with fewer unions experiencing a decrease in their membership or a stable membership trend over the 2–3 years prior to the study (see Table 17). It should be noted that the above trends were self-reported by the unions for the period that included and followed the COVID-19 pandemic (2020–2023). As reported by the union ver.di (Germany), the pandemic had a temporary (decreasing) impact on membership trends.

Table 17: Membership strength of all national trade unions organising TAW workers, by Member States – full details

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership
AT	GPA	GPA	N.A.	Increasing	Second largest
AT	Production Trade Union	PRO-GE	10 000	Stable	Largest
BE	Algemene Centrale der Liberale Vakbonden van België	ACLVB-CGSLB	No data	No data	Smallest within the sector
BE ^(a)	ACV-CSC Puls	ACV-CSC Puls	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)
BE	ABVV-FGTB Metaal	ABVV-FGTB Metaal	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)
BE	ACV-CSC National Federation of White-collar Workers	ACV-CSC CNE	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)
BE	ACV-CSC METEA	ACV-CSC METEA	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB) ^(a)
BE	ACV-CSC Transcom	ACV-CSC Transcom	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB) ^(a)

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership
BE	ACV-CSC Food and Services	ACV-CSC Food and Services	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB) ^(a)
BE	ACV-CSC Construction, Industry and Energy	ACV-CSC BIE	5 732	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB) ^(a)
BE	ABVV-FGTB Federation of White-collar Workers, Technicians and Professional and Managerial Staff	ABVV-FGTB BBTK-SETCA	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB) ^(a)
BE	ABVV-FGTB General Federation	ABVV-FGTB ACCG	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB) ^(a)
BE	ABVV-FGTB Horval	ABVV-FGTB Horval	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB) ^(a)
BE	ABVV-FGTB Belgian Federation for Blue-collar Transport Workers	ABVV-FGTB BTB	53 000	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB) ^(a)
BG	Confederation of Independent Trade Unions of Bulgaria	CITUB	0	N.A.	N.A.
CY	No union				
CZ	KOVO Mladá Boleslav	KOVO MB	1 700	Stable	Largest
CZ	KOVO Kvasiny	KOVO KV	855	Stable	Second largest
CZ	KOVO Vrchlabí	KOVO VL	170	Stable	Third largest
DE	United Services Trade Union	ver.di	6 000	Temporarily decreasing membership during COVID-19, but otherwise stable	Second largest
DE	Industrial Union of Metalworkers	IG Metall	40 000	Fluctuating	Largest

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership
DE	Industrial Union Mining, Chemistry, Energy	IG BCE	2 500	Increasing	Third largest
DK	HK Privat	HK Privat	500	Stable	Second largest
DK	United Federation of Danish Workers	3F	1 300	Stable	Largest
DK	Danish Association of Masters and PhDs	DM	N.A.	Increasing	N.A. (not among the three largest)
EE	No union				
EL	No union				
ES	Mobility, Consumption and Services Federation of the General Union of Workers	FESMC-UGT	N.A.	Increasing	Third largest
ES	Services Federation – Workers’ Commissions	CCOO – Servicios	N.A.	Decreasing	Second largest
ES	Unión y Empleo	Unión y Empleo	N.A.	N.A.	Largest
FI	Service Union United	PAM	8 000	Increasing	Largest (estimation)
FI	Union of Private Sector Professionals	ERTO	214	No data	No data
FI	Industrial Union	Teollisuusliitto	3 130	Increasing	Second or third largest
FR	General Confederation of Labour – Interim	CGT Intérim	Confidential	Increasing	Appears to be the largest in the sector
FR	French Democratic Labour Confederation – Services Federation	FS-CFDT	12 300	Increasing	Second largest
FR	French Confederation of Christian Workers – CSFV	CFTC – CSFV	N.A.	N.A.	Third largest
FR	French Managers’ Confederation – French General Managers’ Confederation – Retail and Services – Syndicat National de l’Encadrement et des Services	CFE-CGC SNES	10–20	Stable	Third largest
FR	Employees and Managers’ Federation – General Confederation of Labour – Force Ouvrière (CGT-FO)	FEC FO	800–1 200	Increasing	Appears to be the fifth largest in the sector
FR	National Union of Autonomous Trade Unions – Trade and Services Federation	UNSA FCS	N.A.	Increasing	Appears to be the smallest in the sector

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Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership
HR	No union				
HU	Federation of Hungarian Metalworkers	VASAS	1 500–1 600	Increasing	Largest
HU	Trade Union of Mine, Energy and Industrial Workers	BDSZ	90–100	Increasing	Second largest
IE	Services Industrial Professional and Technical Union	SIPTU	N.A.	N.A.	N.A.
IT	New Identities of Work in the Italian General Confederation of Labour	NIDIL CGIL	No data	No data	Among the three largest
IT	Federation of Italian Trade, Hotel, Canteen and Service Workers in the Italian General Confederation of Labour	FILCAMS CGIL	No data	No data	Union is more related to directly employed workers of employment agencies and not TAW workers
IT	Federation of Self-employed and Atypical Workers in the Italian Confederation of Workers' Unions	FELSA CISL ^(b)	No data	No data	Among the three largest
IT	Italian Confederation of Tertiary Trade Unions in the Italian Confederation of Workers' Unions	FIST CISL ^(c)	No data	No data	Union is more related to directly employed workers of employment agencies and not TAW workers
IT	Temporary Autonomous Atypical Workers in the Italian Union of Labour	Uiltemp ^(c)	No data	No data	N.A.
IT	Italian Union of Tourism Trade Workers	UILTuCS	No data	No data	Among the 3 largest; union is more related to directly employed workers of employment agencies and not TAW workers
LT	No union				
LU	Luxembourg Confederation of Independent Trade Unions (Services and Energy)	OGB-L	Not possible to provide a number	Increasing (for the whole 'Services' section of the TU)	No indication, but, in general, OGB-L is the largest TU in the Member State
LU	Luxembourg Confederation of Christian Trade Unions (Services)	LCGB Services	Not possible to provide a number	Increasing	Second largest

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Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership
LV	Trade Union of Culture Sector of Latvia	LKDAF	0	N.A. (no members)	No members
MT	General Workers Union	GWU	6 000	Increasing	Largest
MT	Voice of the Workers	UHM	1 300	Increasing	Second largest
NL	Federation of Dutch Trade Unions	FNV	11 000	Increasing	Largest
NL	Christian National Trade Union Federation	CNV	Not disclosed	Not disclosed	Second largest
NL	The Union	De Unie	N.A.	N.A.	N.A.
PL	Solidarity (Solidarność)	Solidarność (°)	No data	No data	No data
PT	Democratic Union of Postal, Telecommunications, Media and Services Workers	Sindetelco	800	Increasing	Largest or second largest
PT	National Trade Union of Telecommunications and Audiovisual Workers	Sinttav	2 634	Increasing	Largest or second largest
PT	Trade Union of Service Sector Workers	SITese	< 100	N.A.	N.A.
RO	No union				
SE	Unionen	Unionen	9 581	Stable	Largest
SE	Swedish Union for Service and Communications Employees (d)	SEKO	N.A. (member of LO)	No data	Not one of the largest
SE	Swedish Trade Union Confederation	LO	67 000	Decreasing	Largest among blue-collar workers
SE	Professional Associations in Trade and Services	AHT	4 500	Stable	Second largest
SE	Swedish Association of Health Professionals	Vårdförbundet	1 000	Increasing	Not among the largest
SE	Swedish Teachers' Union	Sveriges Lärare	30	Stable	N.A.
SE	Sveriges Ingenjörer (d)	Sveriges Ingenjörer	1 500 (member of AHT)	Stable	N.A.
SE	Sveriges Läkarförbund	Sveriges Läkarförbund	N.A.	No data	No data (largest, but only among doctors)
SI	Free Trade Union of Slovenia	SSS	150	Decreasing	Largest / the only one

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership
SK	Trade Union Federation KOVO	OZ KOVO	N.A. (negligible number)	Stable	Largest / the only one
Total			251 896 ^(e)		

^(a) For Belgium, all ACV-CSC federations collaborate within the sector and present themselves to TAW workers via a single point/organisation: Interim United. It is therefore not really relevant to compare all the federations.

^(b) FELSA CISL is listed as a member of UNI Europa Agency Workers, but this was not confirmed by UNI Europa Agency Workers.

^(c) In Italy, FIST CISL and Uiltemp are listed as members of UNI Europa Agency Workers by UNI Europa Agency Workers, but this was not confirmed at the national level. In Poland, Solidarność is also listed as a UNI Europa Agency Workers member, but this was not confirmed by Solidarność.

^(d) SEKO (member of LO) and Sveriges Ingenjörer (member of AHT) were not included in calculations, to avoid double counting.

^(e) Total sum of all rows is **253 396**, but data for Sveriges Ingenjörer are double counted as SEKO members. Thus, total number is 251 896.

Notes: TU, trade union. TUs highlighted in **green** and bold are those that are members of UNI Europa Agency Workers. Total number of TU members: for numbers given as a range, the lower number was used in calculations.

Source: Network of Eurofound Correspondents, 2023.

The cumulative organisational density of trade unions (trade union density (TUD)) ⁽¹⁵⁾, measured for each Member State based on available data, varies between 1 % (in Czechia, Hungary, the Netherlands, Portugal and Slovenia) and 96 % (in Sweden) (see Table 18). The TUD is most commonly between 1 % and 5 % (seven Member States), then between 6 % and 20 % (four Member States). Malta (80 % TUD) and Sweden (96 % TUD) are the only Member States with significantly higher cumulative TUDs for TAW workers. However, these estimates suffer from missing data, as data were unavailable on at least 32 trade unions (see Table 18).

⁽¹⁵⁾ TUD is calculated as the share of trade union members among the total workforce in the sector. Cumulative density is calculated for the whole Member State: number of TAW trade union members (Member State data), divided by employment in the sector.

Table 18: Cumulative TUD by Member State

Member State	Employment in sector (national data; Network of Eurofound Correspondents, 2023)	Number of TUs covered by membership data	Number of TAW TU members (Member State data)	Membership density (TUD) (%) (Member State data)
AT	77 800	1 out of 2	At least 10 000	13
BE	693 077	2 out of 12	At least 58 732	8
BG	4 070	All (1)	0	0
CY	240	No union	—	—
CZ	271 270	All (3)	2 725	1
DE	815 880	All (3)	48 500	6
DK	35 768	2 out of 3	At least 1 800	5
EE	7 177	No union	—	—
EL	15 800	No union	—	—
ES	807 704	None (3)	N.A.	N.A.
FI	62 000	All (3)	11 344	18
FR	787 782	3 out of 6	At least 13 110	2
HR	13 081	No union	—	—
HU	217 707	All (2)	At least 1 590	1
IE	76 700	None (1)	N.A.	N.A.
IT	515 000	None (6)	N.A.	N.A.
LT	9 392	No union	—	—
LU	11 473	None (2)	N.A.	N.A.
LV	2 391	All (1)	0	0
MT	9 111	All (2)	7 300	80
NL	915 000	1 out of 3	At least 11 000	1
PL	700 138	None (1)	N.A.	N.A.
PT	300 000	All (3)	3 534	1
RO	43 569	No union	—	—
SE	85 250	Data for 5 out of 6 relevant to calculations ^(a)	At least 82 111	96
SI	18 239	All (1)	150	1
SK	46 563	None (1)	N.A.	N.A.
Total	6 542 182		251 896	

^(a) Note that, in Sweden, eight TUs are listed. Two of them (SEKO and Sveriges Ingenjörer) are members of peak-level organisations (LO and AHT, respectively), which are listed separately. Therefore, out of the eight TUs listed, only six are relevant to the calculations of TUD (to avoid double-counting membership data provided by both levels: the sectoral union and its peak-level organisation).

Notes: TU, trade union. Organisational density could vary depending on the data source for the employment in TAW. This table relies on the estimates provided by the Network of Eurofound Correspondents for comparison with the national numbers of workers who are members of trade unions that were provided by the unions. See the country pages in Annex 2 for more details.

Source: Network of Eurofound Correspondents, 2023.

2.1.2. Involvement of trade unions in social dialogue and collective bargaining

An important factor defining the position of TAW workers and their representation through trade unions is their position in the industrial relations of the Member State. The union's position in the national landscape is defined by several factors, such as whether the union is a recognised representative at the national level, whether it is involved in national social dialogue structures, whether it is involved in collective bargaining and at which level and, last, its presence in various size groups of companies.

This study shows that a clear majority of unions representing TAW workers are recognised as representative (for TAW workers) at the national level: this is the case for 53 unions (out of 67) in the study (79.1 %). However, that recognition is based on varying rules across the EU, as it can be based on the mutual recognition of the parties and/or the fulfilment of legal requirements.

Being a recognised social partner at the national level enables them to be involved in bipartite or tripartite social dialogue bodies. This study shows that 30 (44.8 %) ⁽¹⁶⁾ trade unions participate in sectoral social dialogue bodies dealing with questions related to the TAW sector. The involvement is executed in various forms: through participation in joint committees and sectoral funds, through collective bargaining or through, for example, health and safety committees. Of the 40 trade unions that are consulted by the government on TAW-related matters, 22 unions (55 %) are consulted regularly, while 16 unions (40 %) are consulted on an ad hoc basis. The two remaining unions did not provide responses on the frequency of the dialogue (see Table 19).

⁽¹⁶⁾ In the remaining Member States, there are various reasons for unions' lack of involvement in social dialogue bodies on TAW: no involvement, no (dedicated) social dialogue bodies, no reply or refusal to share data.

Table 19: Trade union involvement in social dialogue and public policy at the national level

	Total number	TU recognised as representative based on national recognition	Involved in bipartite/ tripartite social dialogue bodies	Consulted by government	Affiliated to a national confederation
Number of TUs	67	53	30	40 Regularly: 22 (55 %) Ad hoc: 16 (40 %)	Yes: 56 No data / not applicable: 11
% of all TUs	100	79.1	44.8	59.7	83.6
Number of Member States	21	13 (AT, BE, BG, DE, DK, ES, FI, FR, IT, LU, NL, PT, SE)	9 (AT, BE, DK, ES, FI, FR, IT, LU, NL)	11 (AT, BE, DE, DK, ES, FI, FR, IT, MT, NL, SE)	17 (AT, BE, BG, DE, DK, ES, FI, FR, HU, IT, LU, LV, NL, PT, SE, SI, SK)

Notes: TU, trade union. See the country pages in Annex 2 for more details.

Source: Network of Eurofound Correspondents, 2023.

Another characteristic of trade unions' positions in national industrial relations is their involvement in collective bargaining. **Of the 67 trade unions, 43 (64.2 %) are involved in collective bargaining, either for TAW as a sector or at the company level.** Close to half of the unions (31 or 46.3 %) are involved in collective bargaining at the sectoral level, and only 16 trade unions (23.9 %) negotiate collective agreements at the company level. This may, however, be unsurprising given the specific characteristics of the sector, as the company-level collective agreements of the user company often also cover TAW workers. In five Member States, all in central and eastern Europe (Bulgaria, Hungary, Latvia, Slovenia, Slovakia), trade unions do not participate in any form of collective bargaining (see Table 20).

It is worth noting that, in general, trade unions are keen on negotiating collectively with employer organisations, but are sometimes confronted with objective obstacles, such as the absence of structures for negotiating on behalf of TAW workers across all sectors or the lack of interest of employer organisations. This is, reportedly, the case in Denmark, where the unions discussed such issues during an interview for this study:

We want to negotiate collective agreements with the TAW industry, but the industry does not seem to be interested. We help members individually with employers and also, for example, in legal proceedings representing many members in cases of mass redundancies and misclassification of pay and conditions. One problem is that many employers have joined employer organisations where they are covered by non-academic collective agreements to circumvent the user companies' pay and employment conditions. They then hire [X]'s members and send them to the user companies on non-academic collective agreements, even though in many cases they are doing academic work. This is currently the subject of litigation.

On top of their involvement in collective bargaining, trade unions mark their position in national industrial relations by taking industrial action in cases where collective bargaining and social dialogue have failed and no solution can be found at the negotiating table. In the past three years, trade unions have organised a number of strikes and similar industrial action aiming to represent the interests of TAW workers.

For instance, in Germany, several instances of such action were organised. First, in the last collective bargaining round in December 2022, all unions of the DGB collective bargaining community organised a demonstration in Berlin, including ver.di members; there have been no strikes organised by ver.di in the TAW sector recently. Second, in March 2023, IG Metall organised a warning strike of employees of Volkswagen TWA Autovision, with 2 000 participating workers according to IG Metall. Third, in order to emphasise its call for an inflation compensation premium for workers in the Bavarian metal and electronics industry, in May 2023, IG Metall also organised a demonstration with 1 000 TAW workers in front of the premises in Munich (Bavaria) in which the negotiations took place. In addition, the industrial trade union IG BCE participated in a joint action of the DGB collective bargaining community in December 2022 in Berlin to demand fair wages for TAW workers ahead of a collective bargaining round.

In France, the CGT Intérim union fought against the pension reform adopted in 2023. The union took numerous actions at the company level, including actions to defend temporary workers who had been penalised by their employer, to demand pay rises or to denounce discrimination. The union has also taken action to hold Adecco's management to account after staff data were hacked, leading to fraudulent withdrawals from employees' bank accounts. Another French trade union, UNSA FCS, marked the 30th anniversary of Fonds d'Action Sociale du Travail Temporaire (FASTT) by organising a competitive question game with the aim of explaining FASTT's missions and the services FASTT can provide to TAW workers, while at the same time increasing UNSA FCS's visibility to facilitate recruitment.

Several examples of TAW-related industrial action were reported in Italy. First, there was a TAW strike on 21 December 2022, in which the main trade unions (NIDIL CGIL, Uiltemp) protested against potential job cuts in some essential services. Second, FILCAMS CGIL organised a strike on 27 March 2023 against the sale of a company employing TAW workers. Third, NIDIL CGIL, Uiltemp and FELSA CISL organised a strike on 9 March 2022 for TAW workers employed in the police headquarters and prefectures. In addition, on 2 May 2022, UILTuCS organised a strike to fight for the rights of TAW workers in the private surveillance and security services sector.

In Malta, GWU organised industrial action in defence of the rights and interests of TAW workers, mainly those in the human health / hospitals sector.

Unions also undertake other actions to address the needs of TAW workers. For instance, in Hungary, the BDSZ is trying to promote a change of status for TAW workers, moving them to employee status, and control the fulfilment of the legal requirements applicable to TAW workers. Similar actions are being undertaken by another Hungarian union, VASAS, which has entered into dialogue with TWAs, with the aim being to make this area more transparent and bring it in line with other types of employment. In other Member States, such as Finland, this has already been achieved thanks to union actions: TAW workers in the services sector are covered by the same general collective agreements as

other workers in the sector, and these are negotiated by the unions. Elsewhere, such as in Portugal and Slovenia, trade unions focus on providing TAW workers with information about their rights, mobilising TAW workers to claim their rights vis-à-vis employers and engaging in dialogue with hiring companies to improve the situation of TAW workers. In Slovenia in particular, the SSS aims to raise awareness of other issues affecting the position of TAW workers in the labour market. One issue that is becoming prevalent in the sector is the decrease in the use of TAW workers, with employers instead outsourcing work to companies denominated as ‘service providers’ and hence evading the rather strict regulation with which TAW workers have to abide. This problem was also mentioned by the President of ZAZ, a Slovenian business association, who commented that the regulation of the TAW sector in Slovenia is quite strict, which causes companies to evade the regulation by creating new business models that are even more difficult to monitor and are not yet regulated (for detailed country-level data, see the country pages and tables in Annexes 1 and 2).

Table 20: Involvement of trade unions in collective bargaining in TAW

	Total number of TUs	Number of TUs involved in any CB	CB level ^(a)	
			Sector	Company
Number of TUs	67	43	31	16
% of all TUs	100	64.2	46.3	23.9
Number of Member States	21	13 (AT, BE, DE, DK, ES, FI, FR, IT, LU, MT, NL, PT, SE)	11 (AT, BE, DE, DK, ES, FI, IT, LU, NL, PT, SE)	7 (BE, DE, DK, ES, FR, IT, MT)
Number of TUs with no data on any level of CB	6 ⁽¹⁷⁾			
Number of Member States in which none of the TUs in the sector are involved in any CB	5 (BG, HU, LV, SI, SK)			

^(a) CB at the sector level = answer to the question ‘Is the TU involved in collective bargaining (CB) for the TAW in all sectors where TAW [workers] are on assignment?’; CB at the company level = answer to the question ‘Is the TU involved in collective bargaining at company level with any temporary work agency?’ Thus, in summary, reference to ‘CB at the sector level’ in the case of TAW means CB for all TAW workers (TAW as a sector). Note that some TUs are involved in CB at both levels and, hence, the total number of TUs involved in sector-level CB plus those involved in company-level CB is not equal to the overall number of TUs involved in any form of CB.

Notes: CB, collective bargaining; TU, trade union. See the country pages in Annex 2 for more details.

Source: Network of Eurofound Correspondents, 2023.

⁽¹⁷⁾ The six are SIPTU (IE), FILCAMS CGIL (IT), FIST CISL (IT), UILTuCS (IT), CNV (NL) and Solidarność (PL).

2.2. National employer organisations and business associations in the sector

This study identified 39 national sectoral employer organisations and business associations from 26 Member States. Only Cyprus has no employer or business representation in TAW. In the 2016 TAW representativeness study, there were 40 sectoral employer organisations / business associations included, from 25 Member States (the study was based on data from 2015 ⁽¹⁸⁾). In Table 21, the numbers in red indicate a change in the number of sectoral employer organisations / business associations between 2015 and 2023 (the year of the latest data for the present study).

Table 21: Numbers of sectoral employer organisations / business associations in the TAW sector, by Member State, 2023 and 2015

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
EOs/BAs (2023)	2	2	2	0	2	2 ^(a)	3	1	1	1	2	1	1	2
EOs/BAs (2016)	2	1	1	0	2	2	2	1	1	2	2	1	1	1
	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	EU
EOs/BAs (2023)	1	2	1	1	1	2	2	2	1	1	1	1	1	39
EOs/BAs (2016)	1	2	1	1	1	0	2	3	2	1	3	1	3	40

^(a) In Germany, a merger of two organisations into one was initiated in 2023 (completed in December 2023).

Notes: BA, business association; EO, employer organisation. The red values indicate differences between the findings for 2015 and 2023. Orange shading indicates Member States with no EOs or BAs.

Sources: Own calculations, 2023, and Eurofound, 2016.

⁽¹⁸⁾ For the numbers of employer organisations / business associations in 2015, please see Eurofound (2016), Table A5, p. 49.

Box 4: Changes in the numbers of employer organisations / business associations between the 2016 and 2023 TAW representativeness studies, by Member States

Belgium. A new organisation was identified as relevant to TAW: VBO-FEB, a cross-industry employer organisation. However, it is important to stress that a sectoral federation of employers, Federgon, is a member of VBO-FEB.

Bulgaria. Two new organisations were identified as relevant to the sector. One is a WEC-Europe member: NECB.

Denmark. The increase in the number of organisations is due to changes in reporting: one organisation is now reported independently, unlike in the previous representativeness study.

Germany. A merger of two employer organisations, BAP and IGZ, was agreed in 2023. A new, merged federation has been operational since December 2023 ⁽¹⁹⁾.

Hungary. Two organisations are reported in the study: one is a business association, and one is an interest representation organisation.

Malta. Two general employer organisations are included in the study, as they cover some member TWAs.

Poland. Only two employer organisations provided some information on their structures. The third, previously included, employer organisation did not wish to share this information. Therefore, it was not included in the study.

Portugal. The change is because one previously included organisation is no longer relevant to the sector.

Slovakia. Most TWAs are not members of employer organisations, and there is only one employer organisation uniting several TWAs.

Spain. Employer organisation and representativeness is highly centralised in a single organisation.

Sweden. Only one employer organisation that signs collective agreements for the sector is currently reported as relevant.

Source: Network of Eurofound Correspondents, 2023.

⁽¹⁹⁾ Information on the merged federation is available on the Gesamtverband der Personaldienstleister (GVP) website (<https://personaldienstleister.de/>).

Between 2016, the date of the last edition of the representativeness study in the TAW sector, and 2023 (the date of the most recent data collected by the Network of Eurofound Correspondents), the overall number of employer organisations and business associations in the sector decreased by one (39, down from 40), which shows a stability of representation on the side of employers/businesses. At the same time, however, the number of Member States with relevant employer organisations and business associations increased from 25 to 26 (with Malta now included), which is considered a positive development. In Belgium⁽²⁰⁾, Bulgaria, Denmark, Hungary and Malta, the number of employer organisations and business associations increased, while in Poland, Portugal, Slovakia, Spain and Sweden the numbers decreased. In Cyprus, the situation remained stable, with no employer organisation / business association present.

2.2.1. Sector-relatedness, coverage and organisational density of employer organisations / business associations

This subsection looks at three aspects of employer representation: their sector-relatedness, their coverage and their organisational density.

2.2.1.1. Domain patterns of employer organisations / business associations in the temporary agency work sector and their sector-relatedness

Almost all identified employer organisations and business associations cover the entire territory of the relevant Member State (38 of 39), with the exception being one organisation in Bulgaria. The landscape of employer organisations / business associations and the activities covered by the employer organisations / business associations differ somewhat across various subsectors for which the firms provide the workforce (TAW workers) (see Table 22 and Table 23).

Table 22: Sector-relatedness of all employer organisations / business associations representing the employers in TAW / TWAs

	EO/BA represents enterprises from other sectors	
	Yes	No
Total number of EOs/BAs	17	21
% of all EOs/BAs	44	54
Number of Member States with an EO/BA	11 (AT, BE, BG, CZ, DK, FI, IT, LT, MT, PT, SE)	17 (AT, BG, DE, EE, EL, ES, FR, HR, HU, IE, LU, LV, NL, PL, RO, SK, SI)

Note: BA, business association; EO, employer organisation. Data for one EO not available.

Source: Network of Eurofound Correspondents, 2023.

Most employer organisations do not have members with activities in other sectors (54 % or 21 organisations, see Table 22). Of the 17 organisations whose members have activities in other sectors, the largest number (at least 5) are grouped under NACE 78 – Employment activities. This covers, for

⁽²⁰⁾ See Box 4 for an explanation of the situation in Belgium.

example, the activities of employment placement agencies (NACE 78.10) and other human resources provision (NACE 78.30), which include providing employment and coaching activities for unemployed people or engaging in recruitment, career guidance and similar human-resources-related consultations. In other Member States, such as Denmark, both employer organisations and business associations represent member companies from the whole private sector. In Malta, the SME Chamber covers all the small and medium-sized enterprises (SMEs) across various sectors in the entire Member State. A detailed description of these activities can be found in Annex 1.

Unlike traditional representativeness studies, this study also looks at another aspect of sector-relatedness, which, in this case, maps those subsectors of the economy to which the TWAs affiliated to the employer organisations / business associations provide TAW workers. The lowest numbers of employer organisations / business associations provide TAW workers to the live performance sector (18 in 14 Member States), education sector (20 in 14 Member States), audiovisual (21 in 16 member States) and other sectors (21 in 17 Member States) (. On the other side of the spectrum is the manufacturing sector, with 87 % of all employer organisations / business associations providing TAW workers for this sector (34 in 24 Member States), followed by the metal and commerce sectors (both with 32 in 22 Member States) (see Table 23). To some extent, this matches the trend in the share of TAW workers by sector, with the highest share of TAW workers in the industry and construction sector and a relatively high share of TAW workers in the commerce sector (see Figure 4). The distribution of employer organisations / business associations in the TAW sector is specific to this industry and only partly follows the general patterns – mainly as regards the manufacturing and road transport sectors – of the sectoral distribution of employer organisations / business associations identified by other researchers (e.g. Aranea et al., 2021, p. 7).

At the national level, some Member States generally lack representation of employer organisations / business associations. This seems to be the case in Bulgaria, Estonia, Greece, Latvia, Malta and Poland, for example. For full details on each Member State, see the table on the sector-relatedness of employers in TAW in Annex 1.

Table 23: Sectors for which member companies of employer organisations / business associations provide the workforce (TAW workers)

	Total	Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	Other sectors
Total number of EOs/BAs providing TAW workers	39	28	32	23	20	32	23	31	30	29	26	27	34	21	18	21
% of all EOs/BAs	100	72	82	59	51	82	59	79	77	74	67	69	87	54	46	54
Number of Member States with an EO/BA providing TAW workers		20	22	16	14	22	18	23	21	18	18	20	24	16	14	17
Number of Member States where there is no EO/BA providing TAW workers		6	4	10	12	4	8	3	5	8	8	6	2	10	12	9
Number of Member States with no EO or BA	1 (Cyprus)															

Notes: BA, business association; EO, employer organisation. The table shows answers to the question 'Please indicate the sectors/activities the TWAs affiliated to this EO provide TAW [workers] for.'

Source: Network of Eurofound Correspondents, 2023.

2.2.1.2. Coverage of the employer organisations / business associations in the temporary agency work sector

Overall, there are 11 453 companies represented by 39 employer organisations / business associations across 26 Member States. Looking at the only official statistics on companies active in NACE 78.2, as reflected in by Eurostat's SBS data, this means that, of the 29 194 companies across the EU in 2022 (27 799 in 2021), 39.2 % were affiliated to employer organisations / business associations in 2023 (41.2 % in 2021). See Figure 6 and Figure 7 in Chapter 1 for the data on the number of companies, and see Table 26 for detailed information on employer organisation / business association density.

Table 24 and Table 25 show that employer organisations / business associations are comparably distributed across companies with 1–9 employees (33 % of members) and companies with 10–49 employees (46 %). More than half of the identified employer organisations / business associations have members in companies with 50–249 employees (59 %) and companies with more than 250 employees (59 %). Overall, 23 out of 39 employer organisations / business associations represent the two last categories, which are also the biggest size group of member companies represented by

employer organisations and business associations. The size group with more than 250 employees is also the group with the smallest number of member companies. At least 783 large companies are represented by their membership of the employer organisations / business associations from 18 Member States with data available.

It should be noted that the presence of employer organisations / business associations in individual Member States varies depending on the size of the companies affiliated. In some cases, the employer organisations / business associations have no affiliated companies in specific company size clusters/categories. In other cases, it is difficult to assess the membership strength, as several employer organisations / business associations provided either general information on the type of affiliated companies (as done by one employer organisation in Denmark), with no breakdown into size categories, or very general qualitative assessments of the situation (as done by employer organisations in Poland).

Table 24: Employer organisation / business association membership, by company size group – summary

	Total	Member company size group			
		1–9	10–49	50–249	> 250
Number of EOs/BAs covering this size group	39	13	18	23	23
% of all EOs/BAs	100	33	46	59	59
Number of Member States	26	11	14	18	18
Number of member companies	At least 11 453	At least 896	At least 1 352	At least 1 389	At least 783
Member States with no EO/BA	CY				

Note: BA, business association; EO, employer organisation.

Source: Network of Eurofound Correspondents, 2023.

2.2.1.3. Membership strength and organisational density of employer organisations / business associations in the temporary agency work sector

Among all employer organisations / business associations representing TWAs, 18 organisations have experienced increasing trends in their membership. Only five employer organisations / business associations have experienced decreasing trends in terms of member companies, making this the weakest trend, as more employer organisations / business associations (12) have experienced a generally stable number of companies in terms of representation. Table 25 presents information on the membership domain and strength of each employer organisation and business association identified in the Member States.

Table 25: Employer organisation / business association membership domain and strength by Member State

Member State	EO/BA name	EO/BA abbreviation	Member of WEC-Europe	Number of TWA members	Membership trend over the 2–3 years prior to the study	Ranking in terms of representativeness of the larger TWAs	Ranking in terms of representativeness of the smaller TWAs
AT	Verband Österreichs Personaldienstleister	ÖPDL	Yes	101	Stable / slightly increased	Second largest	Second largest
AT	Association of the Commercial Service Providers	FVGD	No	911	Increased	Largest (due to mandatory membership)	Largest (due to mandatory membership)
BE	Federgon	Federgon	Yes	Around 200	No data	Largest	Largest
BE	Union of Belgian Enterprises	VBO-FEB	No	50	No data	Second largest	Second largest
BG	National Employment Confederation	NECB/HK3B	Yes	3	Stable	Second largest	No members of the smaller TWA
BG	Bulgarian Employment Confederation	BEC	No	10	Stable	Largest	Largest
CY	No organisation						
CZ	Association of Personal Service Providers	APPS	No ⁽²¹⁾	30	Decreased	Largest	No data
CZ	Association of Employment Agencies	APA	No	50	Increasing, but slowly	Second largest	No data
DE	Bundesarbeitgeberverband der Personaldienstleister	BAP	Yes	Nearly 1 600	Stable	No information by company size; largest EO in the sector	No information by company size; second largest EO in the sector
DE	Association of German Temporary Employment Agencies	IGZ	No	3 778	Increased	Largest	Largest ⁽²²⁾
DK	Dansk Erhverv	Dansk Erhverv	Yes	172	Stable	Largest	Largest

⁽²¹⁾ APPS joined WEC-Europe after the information collection for this representativeness study was completed and is therefore not counted as a member of WEC-Europe for the purposes of this study.

⁽²²⁾ BAP and IGZ ceased to exist on 1 December 2023 and were merged into the GVP. With around 5 300 member companies, the GVP is now the only employer organisation in the sector. Its number of members is increasing, and it is a member of WEC-Europe.

Representativeness of the European social partner organisations: Temporary agency work sector

DK	Dansk Industri	DI	No	128	Increased	Largest in terms of companies with > 50 employees (estimate); available data do not allow a comparison with other EOs	Second largest
DK	Federation of Staffing Agencies in Denmark ⁽²³⁾	VB	No ⁽²⁴⁾	24	Stable	No	No
EE	Eesti Personalitettevõtete Liit	EPREL	Yes	6	Has been stable	The only one	The only one
EL	Hellenic Federation of Private Employment Services	Enidea/Ενιδεα	Yes	11	No data	Largest (and, according to desktop research, the only one)	Seems to be the only one; no information indicating that it represents small TWAs in the sector
ES	Asociación de Agencias de Empleo y Empresas de Trabajo Temporal	Aempleo	Yes	85	Increased	The only one	The only one
FI	Henkilöstöala HELA ry	HELA	Yes	About 420 member companies; around half are large business groups	Increased	Largest	Largest
FI	Palvelualojen työnantajat PALTA ry	PALTA	No	About 24	Increased	Second largest	Second largest
FR	Prism'emploi	Prism'emploi	Yes	600	Increased	Largest	Largest
HR	The Croatian Employers' Association, Coordination for Agency Work and Mediating by Employment	HUP	No	17	Stable	The only one	The only one
HU	Magyar Munkaerő-kölcsönzők Országos Szövetsége	MMOSZ	No	21	Increased	Largest	No data
HU	Magyarországi Diák vállalkozások Országos Érdekképviselői Szövetsége	Diákész	No	16	Increased	Largest	No data

⁽²³⁾ In 2024, this organisation changed its name to Federation Flexible Workforce (BFA). Since this took place after the information collection for this report, the BFA is referred to by its previous name (VB) throughout this report.

⁽²⁴⁾ VB is not counted as a WEC-Europe member in this study despite its indirect membership through Dansk Erhverv, to which this employer organisation is affiliated at the national level. Organisations have to be members of Dansk Erhverv to become members of the federation. The two organisations are highly integrated.

Representativeness of the European social partner organisations: Temporary agency work sector

IE	Employment and Recruitment Federation	ERF	Yes	Over 200 members out of about 450 agencies operating in Ireland	Increased	Largest	Largest
IT	Associazione Nazionale di Categoria delle Agenzie per il Lavoro	Assolavoro	Yes	More than 50 TWAs	Increasing	Organises almost all the main players accounting for the largest part of the sector's total turnover	Organises almost all the main players accounting for the largest part of the sector's total turnover
IT	Associazione Italiana delle Agenzie per il Lavoro	Assosomm	No	47 TWAs	No data	No data	No data
LT	Lietuvos įdarbinimo įmonių asociacija	LĮJA	Yes	7	Decreased	Largest	Largest
LU	FEDIL Employment Services	FES	Yes	32	Increased	The only EO in the sector	The only EO in the sector
LV	Latvijas Pagaidu darba aģentūru asociācija	LPDAA	Yes	3	Stable	Only	Only
MT	Malta Employers Association	MEA	No	20	Stable	Largest	Largest
MT	Malta Chamber of SMEs	SME Chamber	No	8	Increased	Second largest	Second largest
NL	Algemene Bond Uitzendondernemingen	ABU	Yes	522	Stable	Largest	Second largest
NL	Nederlandse Bond van Bemiddelings- en Uitzendondernemingen	NBBU	No	1 283	Increased	Second largest	Largest
PL	Polskie Forum HR	PFHR	Yes	Around 30; importantly, not all members are TWAs (all members are labour/career agencies, but some may specialise in long-term career guidance; others are TWA and have combined services)	Increased (during the pandemic)	Probably the largest	Difficult to estimate

Representativeness of the European social partner organisations: Temporary agency work sector

PL	Ogólnopolski Konwent Agencji Pracy	OKAP	No	Around 50, but not all members are TWA. All members are labour/career agencies, but some may specialise in long-term career guidance; others are TWA and have combined services	Decreasing	Probably second largest	Difficult to estimate
PT	Associação Portuguesa das Empresas do Setor Privado de Emprego e de Recursos Humanos	Apespe RH	Yes	40	Increased	Largest	Largest
RO	Asociația Furnizorilor de Servicii de Resurse Umane	AFSRU	Yes	14	Decreasing	The only one	No other BA in the sector
SE	Kompetensföretagen	KF	Yes	921	Increased	Largest	Largest
SI	Združenje agencij za zaposlovanje	ZAZ	No	10	Stable	The only one	The only one
SK	Asociácia personálnych agentúr Slovenska	APAS	No	9 direct members plus 400 indirect members	Decreased	Largest	N.A. – the smaller TWAs are not members of any association

Notes: BA, business association; EO, employer organisation. For full data, see Annex 1.

Source: Network of Eurofound Correspondents, 2023.

Another way to assess the membership strength of employer organisations / business associations is to look at their employer density rate. However, several methodological issues need to be pointed out before such an assessment. First, as this representativeness study looks at a form of employment, it is important to highlight again that not all employees covered by NACE 78.2, for which company data were provided, are TAW workers. This means that any calculations of employer density in terms of employees covered relate only to TAW as a sector defined by NACE 78.2 – meaning that it includes all types of workers employed in the sector. For this reason, the assessment uses national data provided by the Network of Eurofound Correspondents, collected through qualitative interviews / desk research, on the numbers of companies and workers rather than the official statistical data from Eurostat (SBS). Second, not all activities of companies fall under the category of temporary agency activities. Many companies cover a broader range of employment activities, defined under NACE 78 – Employment activities (section N), which includes activities of employment placing agencies (78.10) and other human resources provision (NACE 78.30). This is notable in Table 26 in cases where density rates are above 100 %.

Looking at the strength of the employer organisations / business associations by Member State, the shares of companies covered vary between 1 % and 131 %. Shares of more than 100 % suggest that some organisations also cover companies outside the TAW sector. Disregarding data that overestimate membership, the highest shares of companies covered are reported in Italy and Belgium, where employer organisations / business associations cover 91 % and 76 % of companies in the sector, respectively. While data on the shares of companies covered are available for all employer organisations / business associations, there is a lack of data on density rates in terms of employees covered. Of those with available data, Maltese employer organisations report covering more workers than there are in the sector (126 %). The remaining Member State data range between 10 % (Portugal), and 97 % (Italy) of workers covered by employer organisations / business associations (see Table 26).

Table 26: Company coverage and organisational density of employer organisations / business associations by Member State

Member State	Companies covered				EO density			
	Number of companies in TAW as a sector (SBS, 2022)	Number of EOs/BAs covered by membership data	Number of EO/BA members in the sector	Share of companies covered (%)	Employment in the sector (Network of Eurofound Correspondents, 2023)	Number of EOs/BAs covered by employee data	Employees covered by EOs/BAs	EO density (%)
AT	770	All (2)	1 012	131	77 800	None	^(a)	—
BE	328	All (2)	250	76	693 077	None	N.A.	—
BG	58	All (2)	13	22	4 070	None	^(a)	—
CY	23	No EO	No EO	N.A.	240			—
CZ	786	All (2)	80	10	271 270	1 out of 2	58 900	22
DE	5 052	All (2)	5 378	106	815 880	1 out of 2	310 000	38
DK	752	All (3)	324	43	35 768	None	^(a)	—
EE	721	All (1)	6	1	7 177	All (1)	1 000	14
EL	58	All (1)	11	21	15 800	None	N.A.	—
ES	478	All (1)	85	18	807 704	None	N.A.	—
FI	1 886	All (2)	444	24	62 000	None	^(a)	—
FR	1 799	All (1)	600	33	787 782	None	^(a)	—
HR	232	All (1)	17	7	18 256	None	^(a)	—
HU	503	All (2)	37	7	217 707	1 out of 2	100 000	46
IE	143	All (1)	200	N.A.	76 700	None		—
IT	107	All (2)	97	91	515 000 (monthly average)	1 out of 2	500 000	97
LT	203	All (1)	7	3	9 392	None	^(a)	—

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LU	68	All (1)	32	47	11 473	None	(^a)	—
LV	153	All (1)	3	2	2 391	None	(^a)	—
MT	24	All (2)	28	117	9 111	All (2)	11 500	126
NL	7 617	All (2)	1 805	24	915 000	None	(^a)	—
PL	2 010	All (2)	80	4	700 138	None	(^a)	—
PT	430	All (1)	40	9	300 000	All (1)	30 088	10
RO	576	All (1)	14	2	39 307	None	(^a)	—
SE	4 094	All (1)	921	22	85 250	All (1)	70 000	82
SI	179	All (1)	10	6	18 239	None	(^a)	—
SK	144	All (1)	9	6	46 563	None	(^a)	—

(^a) EOs provided only self-reported estimates of the percentage of the workforce covered.

Notes: BA, business association; EO, employer organisation. EO density = employees in firms organised in EOs/BAs as a proportion of all employees. See the country pages in Annex 2 for more details. Highlighted in orange are the Member States where estimated EO density is above 100 %. This suggests that the organisation covers companies or employees outside the TAW sector. Data on the number of companies in NACE 78.2 for 2022 are all provisional. Data on employment in the sector are based on national data provided by the Network of Eurofound Correspondents. In cases where there is more than one organisation, data were combined.

Source: SBS, 2022, and Network of Eurofound Correspondents, 2023.

Importantly, many employer organisations / business associations did not report absolute numbers of workforce covered. Instead, the majority of them indicated only estimates of the percentage of the workforce covered. These estimates of coverage were between 26 % (for the NBBU in the Netherlands) and 100 % (for the ÖPDL in Austria), but, in general, employer organisations / business associations reported relatively high density rates (see Table 27).

Table 27: Self-reported estimates of employer organisation / business association density rates in terms of workforce covered

Member State	EO/BA name	EO/BA abbreviation	Self-reported organisational density in terms of workforce covered (%)
AT	Verband Österreichs Personaldienstleister	ÖPDL	100 (of all TAW workers)
AT	Association of the Commercial Service Providers	FVGD	70 (of all TAW workers)
BE	Federgon	Federgon	N.A.
BE	Union of Belgian Enterprises	VBO-FEB	75
BG	National Employment Confederation	NECB/HK3B	Approximately 40
BG	Bulgarian Employment Confederation	BEC	Approximately 50
CZ	Association of Employment Agencies	APA	N.A.
DE	Bundesarbeitgeberverband der Personaldienstleister	BAP ⁽²⁵⁾	N.A.
DK	Dansk Erhverv	Dansk Erhverv	45
DK	Dansk Industri	DI	Less than 50
DK	Federation of Staffing Agencies in Denmark	VB	N.A.
EL	Hellenic Federation of Private Employment Services	Enidea/Ενιδεα	N.A.
ES	Asociación de Agencias de Empleo y Empresas de Trabajo Temporal	Aempleo	N.A.
FI	Henkilöstöala HELA ry	HELA	About 60
FI	Palvelualojen työnantajat PALTA ry	PALTA	Less than 40
FR	Prism'emploi	Prism'emploi	95
HR	The Croatian Employers' Association, Coordination for Agency Work and Mediating by Employment	HUP	80
HU	Magyar Munkaerő-kölcsönzők Országos Szövetsége	MMOSZ	Estimated 66
IE	Employment and Recruitment Federation	ERF	N.A.
IT	Associazione Italiana delle Agenzie per il Lavoro	Assosomm	N.A.
LT	Lietuvos įdarbinimo įmonių asociacija	LĮJA	Approximately 30–45
LU	FEDIL Employment Services	FES	75–80
LV	Latvijas Pagaidu darba aģentūru asociācija	LPDAA	50

⁽²⁵⁾ BAP and IGZ merged in December 2023 to form the GVP.

Member State	EO/BA name	EO/BA abbreviation	Self-reported organisational density in terms of workforce covered (%)
NL	Algemene Bond Uitzendondernemingen	ABU	60–65
NL	Nederlandse Bond van Bemiddelings- en Uitzendondernemingen	NBBU	About 26
PL	Polskie Forum HR	PFHR	33 (of all TAW workers)
PL	Ogólnopolski Konwent Agencji Pracy	OKAP	N.A.
RO	Asociația Furnizorilor de Servicii de Resurse Umane	AFSRU	40 (of member companies)
SI	Združenje agencij za zaposlovanje	ZAZ	70
SK	Asociácia personálnych agentúr Slovenska	APAS	50

Notes: BA, business association; EO, employer organisation. Nine organisations for which we have membership data from other, not self-reported, sources were not included in this table. For full data, see Annex 1.

Source: Network of Eurofound Correspondents, 2023.

2.2.2. Involvement of employer organisations /business associations in social dialogue and collective bargaining

This section focuses on the involvement of employer organisations and business associations in national bipartite and tripartite social dialogue structures and in collective bargaining for TAW. Table 28 provides an overview of employer organisations' and business associations' involvement in social dialogue and public policy at the national level.

Data show a challenging picture for the representative organisations of the companies. Out of 39 organisations, 54 % (or 21 organisations) are categorised as employer organisations and 31 % (or 12 organisations) are business associations. Six organisations (or 15 %) are classified as both types ⁽²⁶⁾.

Overall, 69 % (27 out of 39) are recognised nationally as representative organisations, based on either the fulfilment of legal requirements or mutual recognition. Fewer than half (41 %) participate in bipartite or tripartite social dialogue bodies, often because such bodies do not exist for the TAW sector specifically. However, the majority of employer organisations / business associations (72 %) are consulted by the government on issues related to the sector, and 64 % are affiliated to a national confederation.

⁽²⁶⁾ In the framework of this research exercise, the difference between employer organisations and business associations is that employer organisations are involved in collective bargaining – even if they do not sign collective bargaining agreements – and are consulted by the government on working condition matters regarding the sector, while business associations are focused on the business and commercial interests of the employers in the sector.

Table 28: Employer organisation / business association involvement in social dialogue and public policy at the national level

	Total number	Type of organisation (EO/BA)	EOs/BAs recognised as representative based on national recognition	Involved in bipartite/ tripartite social dialogue bodies	Consulted by government	Affiliated to a national confederation
Number of EOs/BAs	39	BA: 12 EO: 21 Both: 6	27	16	28	25
% of all EOs/BAs	100	BA: 31 EO: 54 Both: 15	69	41	72	64
Number of Member States	26	BA: 9 (AT, BG, CZ, EL, HU, LT, LV, RO, SI) EO: 14 (AT, BE, DE, ES, FI, FR, HR, IT, LU, MT, NL, PL, SE, SK) Both: 4 (DK, EE, IE, PT)	19 (AT, BE, DE, DK, EL, ES, FI, FR, HR, IE, IT, LT, LU, LV, NL, PL, PT, SE, SK)	11 (AT, BE, CZ, DK, ES, FI, FR, LU, NL, PL, RO)	20 (AT, BE, CZ, DE, DK, ES, FI, FR, HU, IE, IT, LT, LV, MT, NL, PL, RO, SE, SI, SK)	19 (AT, BE, BG, CZ, DE, DK, EE, ES, FI, FR, HU, IT, LT, LU, NL, PT, SE, SI, SK)

Notes: BA, business association; EO, employer organisation. See the tables in Annex 1 for a detailed overview for each Member State.

Source: Network of Eurofound Correspondents, 2023.

Table 29 shows the involvement of employer organisations / business associations across two levels of collective bargaining: sector and company. Out of the 39 employer organisations / business associations, 46 % (or 18 organisations) are engaged in some form of collective bargaining. Almost half of them (46 %) participate in sector-level collective bargaining, and only 8 % (three organisations, two from Denmark and one from Italy) participate at the company level. One employer organisation from Italy had no data on any form of involvement in collective bargaining. In 14 Member States (more than half), none of the employer organisations / business associations in the TAW sector are involved in any form of collective bargaining, highlighting significant variations in the industrial relations landscapes between Member States.

Table 29: Involvement of employer organisations / business associations in collective bargaining in TAW

	Total number of EOs/BAs	Number of EOs/BAs involved in any CB	CB level ^(a)	
			Sector	Company
Number of EOs/BAs	39	18	18	3
% of all EOs/BAs	100	46	46	8
Number of Member States	26	12 (AT, BE, DE, DK, ES, FI, FR, IT, LU, NL, PT, SE)	12 (AT, BE, DE, DK, ES, FI, FR, IT, LU, NL, PT, SE)	2 (DK, IT)
Number of EOs/BAs with no data on any level of CB	1 (IT)			
Number of Member States in which none of the EOs/BAs in the sector are involved in any CB	14 (BG, CZ, EE, EL, HR, HU, IE, LT, LV, MT, PL, RO, SI, SK)			

^(a) CB at the sector level = answer to the question 'Is the EO/BA involved in collective bargaining (CB) at sector level for TAW?'; CB at the company level = answer to the question 'Is the EO involved in collective bargaining at company level for TAW?'

Notes: BA, business association; CB, collective bargaining; EO, employer organisation. See the tables in Annex 1 for a detailed overview for each Member State.

Source: Network of Eurofound Correspondents, 2023.

2.3. Temporary work agency companies as industrial relations actors

This section looks at another participant in industrial relations: companies. This study sought to report on the three largest TWAs in each Member State, which should, in theory, give a total of 81 companies for the Member States. However, the granularity of the collected data varies between Member States, with various levels of detail for Member States and companies and missing data regarding some Member States / companies. Therefore, **data are reported on 73 companies in 25 Member States** (see Table 30). Data on companies in Cyprus, which also has no representation on the union or employer side, and Greece were not available. For Czechia, experts were only able to rank and identify one company (for full details on each Member State, see Table A9 in Annex 1).

It is important to note that some of these companies are employment agencies and not exclusively TWAs, so they can provide general recruitment services; this is despite the data collection asking about the largest companies in the TAW sector, based on NACE sector delineations. Some of the company-level data collected could not be verified, as data are often treated as company/business confidential information.

Another important methodological note is related to the fact that correspondents were to list the three largest companies in the sector, based on the largest number of employees in TAW activities. **However, in some Member States, these rankings were based on the number of employees in the company (internal staff) and not on the number of TAW workers.** This is, for instance, the case in Belgium, where data or rankings based on the numbers of TAW workers are not available. In this case, the three largest companies were selected based on the number of TAW service providers these companies employ.

Table 30: Three largest companies/TWAs and their workforce by Member State

Member State	Largest TWAs	Reported national or multinational company (if multinational, parent or subsidiary)	Estimated number of TAW employees
AT	Trenkwalder Personaldienste	Trenkwalder Personaldienste	7 000
AT	Manpower	Manpower	N.A.
AT	Hoffmann	Hoffmann	N.A.
BE	Randstad	Randstad	25 000
BE	Start People	USG Group	10 000
BE	Adecco	Adecco	8 500
BG	Trenkwalder	Trenkwalder	1 295
BG	Easy Consult	Easy Consult	697
BG	Manpower Bulgaria	Manpower	695
CY	Access to data refused by the government administration		N.A.
CZ	Manpower	Manpower	N.A.
CZ	N.A.		
CZ	N.A.		
DE	Randstad Deutschland	Randstad	36 000
DE	Adecco Germany Holding	Adecco	26 674
DE	Persona Service		13 016
DK	JKS		6 401
DK	Moment	Edda Group	5 787
DK	Carelink		4 255
EE	Finesta	Finesta	750
EE	Humanlink Estonia	Humanlink Estonia	353
EE	Euro Work	Euro Work	228
EL	No data		
EL	No data		
EL	No data		
ES	Randstad	Randstad	19 223
ES	Adecco	Adecco	23 490
ES	Manpower	Manpower	15 250

Member State	Largest TWAs	Reported national or multinational company (if multinational, parent or subsidiary)	Estimated number of TAW employees
FI	Barona	Barona	12 600
FI	Eezy		32 000 (per year)
FI	Staffpoint		14 300
FR	Adecco	Adecco	9 000 permanent staff plus 430 000 per year
FR	Manpower	Manpower	3 950 permanent staff plus 80 000 per week
FR	Randstad	Randstad	1 500 permanent staff plus 85 000 per week
HR	Dekra zapošljavanje	Dekra	400
HR	Trenkwalder za privremeno zapošljavanje	Trenkwalder	350
HR	Kadus		300
HU	Prohumán 2004		7 345
HU	WHC		5 470
HU	Work Force		3 049
IE	Staffline / Grafton Recruitment		14 000
IE	CPL		13 000
IE	Morgan McKinley	Morgan McKinley	N.A.
IT	Adecco Italia	Adecco	50 000
IT	Randstad Italy	Randstad	40 000
IT	GI Group	GI Group	35 000
LT	Headex Group	Headex	2 300
LT	Biuro	Biuro	1 400
LT	Litpark		860
LU	Randstad Interim	Randstad	1 480
LU	Adecco Luxembourg	Adecco	1 120
LU	Sofitex Sàrl Personnel Temporaire		1 060
LV	Biuro		593
LV	Manpower Lit	Manpower	500
LV	Simplika		220
MT	OZO Group		3 000+
MT	Healthmark		3 000+
MT	G4S Malta	G4S	1 500+
NL	Randstad Group NL	Randstad	68 000
NL	HeadFirst Group		25 000
NL	RGF Staffing NL	RGF Staffing	15 000

Member State	Largest TWAs	Reported national or multinational company (if multinational, parent or subsidiary)	Estimated number of TAW employees
PL	Randstad	Randstad	Tens of thousands
PL	ManpowerGroup	ManpowerGroup	Tens of thousands
PL	Addeco Group	Addeco Group	Tens of thousands
PT	Multipessoal		4 878
PT	Multitempo	Job&Talent	4 044
PT	Triangulu		3 000
RO	Lugera & Makler Romania		4 217
RO	Prohuman APT		3 330
RO	Adecco Resurse Umane	Adecco	3 079
SE	Manpower	Manpower	5 020
SE	Randstad	Randstad	4 915
SE	Lernia Bemanning		4 228
SI	Kariera		2 300
SI	Adecco H.R.	Adecco	1 500
SI	Trenkwalder	Trenkwalder	873
SK	Index Nosluš		2 077
SK	Adecco Slovakia	Adecco	1 100
SK	Transfer International Staff		936
Total			≥ 1 212 408

Note: A more detailed description can be found in the annexes (see the tables on the largest companies in Annex 1 and the country pages in Annex 2). Empty cells in the second column mean that no multinational company was reported.

Source: Network of Eurofound Correspondents, 2023.

The largest TWAs in the sector listed in Table 30 employ approximately / at least 1 213 408 employees in total (some companies' employment data were missing). However, as noted earlier, due to methodological issues, it is hard to estimate how many of those are directly employed staff of the companies with standard employment contracts versus TAW workers. Nevertheless, some level of detail can be provided, although it is dependent on the companies' willingness to share such data (see the country pages in Annex 2).

Of the total 73 companies, 47 (64 %) were subsidiaries of multinational companies (see Table 30). The 'big four' multinational companies – Adecco, Randstad, Manpower and Trenkwalder – are among the three largest companies in most Member States.

The top three multinational companies – Adecco, Randstad and Manpower – are separated by a large margin from the fourth biggest, Trenkwalder, which, despite its presence in at least four Member States, employs only a relatively small number of workers. In total, the four top companies across the EU employ 951 514 employees, which represents 78 % of all TAW workers employed in the largest companies in all Member States in the sector. Of the 28 subsidiaries of the 'big four', trade union presence was reported in 14 cases (50 %). Of those trade unions present in the subsidiaries of

multinational TAW worker companies, 12 unions were affiliated to UNI Europa Agency Workers (see Table A9 in Annex 1). In addition, 17 subsidiaries of the big four are affiliated to employer organisations, of which all are affiliated to WEC-Europe; however, in Bulgaria, the BEC is not considered representative for the TAW sector (see Table 32). Thus, in total, 17 subsidiaries are indirectly affiliated to WEC-Europe through their parent companies (multinational companies that are direct members of WEC-Europe).

When analysing TAW market domination by looking at the proportion of TAW workers employed by the three largest TWAs in each Member State, in several Member States, the three largest companies dominate the national markets to a very significant extent. In Finland and Malta, percentages of more than 100 % suggest that the largest companies reported more employees than the overall numbers of TAW workers on the labour markets, possibly reporting all employees active in the employment services sector rather than only those in TAW. In Hungary and Denmark, more than 90 % of all TAW workers are employed by the three largest companies. High numbers are also reported in Romania, with 84 % of TAW workers employed by these companies. At the lower end, Slovakia has 4% and Latvia 5 % coverage(see Table 31 or Table 32).

However, it is again important to stress that these numbers will differ depending on the source of data for the total number of TAW workers. In this case, EU-LFS data – which report all TAW workers across sectors – were reported, as they better represent TAW as a type of work rather than a sector. However, data for the SBS on the number of employees for each NACE code could also be used for this analysis, taking into account their limitations.

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Table 31: Workforce of the largest TWAs

Member State	Total number of TAW workers	Number of TAW workers in the largest company	% in largest company	Number of TAW workers in the second largest company	% in second largest company	Number of TAW workers in the third largest company	% in third largest company	% of the sectoral workforce in the three largest companies	% of the sectoral workforce in these companies organised by TUs affiliated to UNI Europa Agency Workers
AT	90 971	7 000	8	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
BE	84 495	25 000	30	10 000	12	8 500	10	41	51
BG	N.A.	1 295	N.A.	697	N.A.	695	N.A.	N.A.	
CY	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
CZ	68 020	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
DE	1 064 458	36 000	3	26 674	3	13 016	1	7	
DK	18 125	6 401	35	5 787	32	4 255	23	91	
EE	N.A.	750	N.A.	353	N.A.	228	N.A.	N.A.	
EL	452 961	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
ES	676 991	19 223	3	23 490	3	15 250	2	9	
FI	43 868	12 600	29	32 000	73	14 300	33	121	121
FR	648 479	439 000	N.A.	83 950	N.A.	86 500	N.A.	N.A.	N.A.
HR	14 622	400	3	350	2	300	2	7	
HU	16 932	7 345	43	5 470	32	3 049	18	94	
IE	50 609	14 000	28	13 000	26	N.A.	N.A.	N.A.	
IT	187 341	50 000	N.A.	40 000	N.A.	35 000	N.A.	N.A.	N.A.
LT	10 788	2 300	21	1 400	13	860	8	42	
LU	7 002	1 480	21	1 120	16	1 060	15	52	52
LV	25 240	593	2	500	2	220	1	5	
MT	4 305	3 000	70	3 000	70	1 500	35	174	
NL	412 503	68 000	16	25 000	6	15 000	4	26	26
PL	61 031	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
PT	69 305	4 878	7	4 044	6	3 000	4	17	13
RO	12 605	4 217	33	3 330	26	3 079	24	84	
SE	129 250	5 020	N.A.	4 915	N.A.	4 228	N.A.	N.A.	N.A.
SI	39 799	2 300	6	1 500	4	873	2	12	
SK	97 923	2 077	2	1 100	1	936	1	4	
Number of Member States with a TU affiliated to UNI Europa Agency Workers		9		9		7			

Notes: TU, trade union. For Sweden, the assumption is that, in the largest companies, many unions are present. Companies with unions affiliated to UNI Europa Agency Workers are highlighted in green. For Malta, data are adjusted/simplified. See Table A9 in Annex 1 for full data. In Finland and Malta, the share of the sectoral workforce in TWA companies organised by TUs affiliated to UNI Europa Agency Workers is above 100 % (indicated in red).

Sources: Network of Eurofound Correspondents, 2023. Total number of TAW workers: Eurostat, EU-LFS, 2021 (see Table 6).

When analysing the profiles of TWAs and particularly their representativeness, it is important to consider links to European-level employer organisations. Some of the largest TWAs across the EU are affiliated to employer organisations either directly or through national employer federations. Regarding the largest TWAs among those reported in each Member State, companies are affiliated to an employer organisation that is a member of WEC-Europe in 10 of the 27 Member States (37 %); these companies employ over 215 231 TAW workers (30 % of all TAW workers employed in the largest companies across the EU; or 5 % of all TAW workers). In total, there are 12 (44 %) of the second largest companies, employing 79 % of all TAW workers employed in the second largest companies (or 5 % of all TAW workers), that are affiliated to WEC-Europe through a national-level employer organisation and the same applies to 10 (i.e. 37 %) of the third largest companies, employing 81 % of all TAW workers employed in the third largest companies (or 4 % of all TAW workers) are affiliated, too (Table 32).

The largest, second largest and third largest companies affiliated to WEC-Europe represent a total of 51 % of the combined population of TAW workers employed in the three largest companies in the Member States, which represents 14 % of all TAW workers.

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Table 32: Largest TAW companies affiliated to an employer organisation that is a member of WEC-Europe

Member State	Total number of TAW workers	Number of TAW workers in the largest company	% in largest company	Number of TAW workers in the second largest company	% in second largest company	Number of TAW workers in the third largest company	% in third largest company	% of the sectoral workforce in the three largest companies	% of the sectoral workforce in the companies organised by WEC-Europe
AT	90 971	7 000	8	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
BE	84 495	25 000	30	10 000	12	8 500	10	51	51
BG	N.A.	1 295	N.A.	697	N.A.	695	N.A.	N.A.	N.A.
CY	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
CZ	68 020	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
DE	1 064 458	36 000	3	26 674	3	13 016	1	7	6
DK	18 125	6 401	35	5 787	32	4 255	23	91	
EE	N.A.	750	N.A.	353	N.A.	228	N.A.	N.A.	
EL	452 961	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
ES	676 991	19 223	3	23 490	3	15 250	2	9	9
FI	43 868	12 600	29	26 000	59	14 300	33	121	
FR	648 479	439 000	N.A.	83 950	N.A.	86 500	N.A.	N.A.	N.A.
HR	14 622	400	3	350	2	300	2	7	
HU	16 932	7 345	43	5 470	32	3 049	18	94	
IE	50 609	14 000	28	13 000	26	N.A.	N.A.	N.A.	
IT	187 341	50 000	N.A.	40 000	N.A.	35 000	N.A.	N.A.	N.A.
LT	10 788	2 300	21	1 400	13	860	8	42	34
LU	7 002	1 480	21	1 120	16	1 060	15	52	
LV	25 240	593	2	500	2	220	1	5	5
MT	4 305	3 000	70	3 000	70	1 500	35	174	
NL	412 503	68 000	16	25 000	6	15 000	4	26	26
PL	61 031	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
PT	69 305	4 878	7	4 044	6	3 000	4	17	17
RO	12 605	4 217	33	3 330	26	3 079	24	84	84
SE	129 250	5 020	N.A.	4 915	N.A.	4 228	N.A.	N.A.	N.A.
SI	39 799	2 300	6	1 500	4	873	2	12	
SK	97 923	2 077	2	1 100	1	936	1	4	
Total	4 287 623	712 879		281 680		211 849			
Number of Member States with a company affiliated to an EO affiliated to WEC-Europe		10		12		10			13

Notes: EO, employer organisation. Companies belonging to an EO that is a member of WEC-Europe are highlighted in orange.

Sources: Network of Eurofound Correspondents, 2023. Total number of TAW workers: Eurostat, EU-LFS, 2021 (see Table 6).

Of the 73 largest TAW companies across the EU, 39 (53.4 %) are involved in some form of collective bargaining; the remaining 46.6 % either reported no collective bargaining or provided no data. Of the 39 companies involved in collective bargaining, 27 (69 %) were involved in multi-employer bargaining (MEB) and/or MEB with an extension mechanism (three companies), while three companies (8 %) were involved in single-employer bargaining (SEB) and a further eight companies (21%) participated in both SEB and MEB (Table 33).

The most prevalent form of collective bargaining for the largest, second largest and the third largest companies is MEB: in the largest companies, this covers 178 779 TAW workers (25 % of TAW workers in this size category); in the second largest companies, it covers 107 540 TAW workers (38.2 % of TAW workers employed in this size category); in the third largest companies, it covers 90 809 TAW workers (42.9 % of TAW workers in this company size category). All in all, all three size categories of companies involved in MEB cover a total of 361 878 TAW workers or 30 % of all TAW workers employed in the largest companies across the EU.

If companies covered by MEB with an extension mechanism are added, an additional 52 900 TAW workers are added to the combined total for all three company size categories. Therefore, the share of TAW workers employed in companies covered by MEB and MEB with an extension mechanism (414 778) is 34.3 % of all TAW workers employed in the largest companies.

Second, eight companies from Belgium (3), France (3) and Spain (2) bargain collectively on both levels, SEB and MEB. This form covers in total 695 663 TAW workers, or 57.6 % of all TAW workers employed in the largest companies.

Last, SEB is only marginally applied by the largest TWAs in Malta, with a total of 7 500 employed TAW workers covered by this form of negotiation.

Representativeness of the European social partner organisations: Temporary agency work sector

Table 33: Collective bargaining landscape in the largest TAW companies

Member State	Total number of TAW workers	Number of TAW workers in the largest company	% in largest company	Number of TAW workers in the second largest company	% in second largest company	Number of TAW workers in the third largest company	% in third largest company	% of the sectoral workforce in the three largest companies together	% of the sectoral workforce in the companies with any CB involvement
AT	90 971	7 000	8	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
BE	84 495	25 000	30	10 000	12	8 500	10	51	51
BG	N.A.	1 295	N.A.	697	N.A.	695	N.A.	N.A.	
CY	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
CZ	68 020	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
DE	1 064 458	36 000	3	26 674	3	13 016	1	7	7
DK	18 125	6 401	35	5 787	32	4 255	23	91	91
EE	N.A.	750	N.A.	353	N.A.	228	N.A.	N.A.	
EL	452 961	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
ES	676 991	19 223	3	23 490	3	15 250	2	9	
FI	43 868	12 600	29	26 000	59	14 300	33	121	121
FR	648 479	439 000	N.A.	83 950	N.A.	86 500	N.A.	N.A.	N.A.
HR	14 622	400	3	350	2	300	2	7	
HU	16 932	7 345	43	5 470	32	3 049	18	94	
IE	50 609	14 000	28	13 000	26	N.A.	N.A.	N.A.	
IT	187 341	50 000	N.A.	40 000	N.A.	35 000	N.A.	N.A.	N.A.
LT	10 788	2 300	21	1 400	13	860	8	42	
LU	7 002	1 480	21	1 120	16	1 060	15	52	52
LV	25 240	593	2	500	2	220	1	5	
MT	4 305	3 000	70	3 000	70	1 500	35	174	174
NL	412 503	68 000	16	25 000	6	15 000	4	26	26

Representativeness of the European social partner organisations: Temporary agency work sector

PL	61 031	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	
PT	69 305	4 878	7	4 044	6	3 000	4	17	17
RO	12 605	4 217	33	3 330	26	3 079	24	84	84
SE	129 250	5 020	N.A.	4 915	N.A.	4 228	N.A.	N.A.	N.A.
SI	39 799	2 300	6	1 500	4	873	2	12	
SK	97 923	2 077	2	1 100	1	936	1	4	
Total	4 287 623	712 879		281 680		211 849			

Notes: CB, collective bargaining. Only companies that reported the presence of CB are highlighted.

	SEB
	MEB
	Both (SEB and MEB)
	MEB + MEB with an extension mechanism
	No information available, but the law requires any company with more than 21 employees to have collective bargaining

Sources: Network of Eurofound Correspondents, 2023. Total number of TAW workers: Eurostat, EU-LFS, 2021 (see Table 6).

2.4. Collective bargaining and social dialogue practices in the temporary agency work sector

This section looks at social dialogue in TAW by looking first at collective bargaining and then at existing social dialogue structures in the sector.

2.4.1. Collective bargaining

Collective bargaining is an important regulation-setting mechanism, which is especially important for non-standard employees, such as TAW workers. However, like organising a workforce that is temporary in nature, the types of collective bargaining in the TAW sector have several specific characteristics that stem from the fact that TAW can be both a type of employment and a type of activity demarcated by a NACE code.

Eurofound (2009) **distinguishes four types of collective bargaining in TAW**. First, there is collective bargaining at the national, intersectoral level, which includes agreements reached between the highest-level social partners and governments that might influence developments in legislation. Second is collective bargaining within the TAW sector itself, which is prevalent in most Member States that have traditions of sector-level bargaining. Third is company-level negotiations within TWAs. Fourth is collective bargaining in sectors of user companies; in other words, agreements are negotiated and concluded for the sectors in which user companies (of TAW workers) are based.

Table 34 presents a comprehensive overview of collective bargaining practices among trade unions, employer organisations / business associations and TWAs. **The majority of trade unions (43 or 64 %) engage in some form of collective bargaining. The prevailing type is MEB (31 unions).** Thirteen unions (less than 20 %) do not engage in any collective bargaining; 11 unions had no data available. The majority of employer organisations / business associations (20 or 51 %) do not engage in collective bargaining, but 18 (46 %) participate in some form of collective bargaining. Again, the most frequent form is MEB, although it is less common, with only 15 organisations (38 %) engaging in this type of bargaining. **A notable 24 TWAs (33 %) do not engage in any collective bargaining.** However, 36 TWAs (49 %) conclude collective agreements, with MEB again the dominant form (27 TWAs). There are no data on collective bargaining regarding 13 of the TWAs.

Table 34: Collective bargaining patterns in the sector (number and % of organisations), EU-27

	Trade unions		Total number	%	Employer organisations / business associations		Total number	%	TWAs		Total number	%
No data	11		67	100	1		39	100	13		73	100
No collective bargaining	13				20				24			
MEB only	31	Any form: 43 (64 %)			15	Any form: 18 (46 %)			27	Any form: 36 (49 %)		
Both SEB and MEB	4				3				6			
SEB only	8				0				3			

Source: Network of Eurofound Correspondents, 2023.

Collective bargaining coverage across the EU tends to be polarised, grouping at the two ends of the spectrum, and it is usually high, very low or non-existent (see Table 35). Member States with MEB tend to have high coverage of collective agreements. This is particularly the case for Austria, Finland, Germany and Luxembourg, where collective bargaining coverage rates are estimated at almost 100 %. In Denmark, the coverage rate is estimated at 90 %. The majority of TAW workers are also covered by MEB in Sweden (80–90 %) and in the Netherlands (85 %). Four Member States bargain at both the multi-employer and single-employer levels and report universal coverage (100 %) of all TAW workers: Belgium, France, Italy and Spain. Malta is the only Member State with SEB, which covers approximately 15 % of the TAW workforce.

A good example of universal sector coverage is Germany, where trade unions negotiate collectively on behalf of 100 % of agency workers. In 2019, eight DGB member unions reached a collective agreement for around 750 000 TAW workers; the agreement has been in force since January 2020. The deal brought a pay rise of between 1.9 % and 4.1 %, with higher increases gradually in 2021 and 2022. On top of the pay rises, the collective bargaining agreement guarantees more days off and an increase in holiday and Christmas bonuses for all employees in the future. The deal was described by the DGB board member Stefan Körzell as ‘another important step towards harmonising working conditions for employees in this industry’ (ETUC, undated).

In Bulgaria, Hungary, Latvia, Slovakia and Slovenia, there is no collective bargaining. This is also the case for Member States with no trade union representation (Croatia, Cyprus, Estonia, Greece, Lithuania and Romania). In Czechia and Ireland, collective bargaining is present but no detailed information on the level of coverage is available. In Poland, collective bargaining for TAW has little relevance, since, according to the data gathered by the National Register of Employment Agencies, most temporary workers have contracts lasting up to three months.

Table 35: Estimated coverage of collective bargaining in TAW, by Member State

Type of collective bargaining	Collective bargaining coverage (%)						Information not available
	> 94	75–94	50–74	25–49	1–24	0	
MEB	AT, DE, FI, LU	DK, NL, SE			PT		
Both SEB and MEB	BE, ES, FR, IT						
SEB					MT		
No collective bargaining						BG, HU, LV, SI, SK No unions: CY, EE, EL, HR, LT, RO	CZ, IE, PL

Note: For Czechia and Ireland, collective bargaining is present but no detailed information is available and/or coverage is difficult to estimate.

Source: Network of Eurofound Correspondents, 2023.

Table 36 presents full data on the estimated collective bargaining coverage, including the available qualitative assessments, in each Member State, as reported by the Network of Eurofound Correspondents.

Table 36: Estimated collective bargaining coverage and qualitative assessments by Member State

Member State	Estimated collective bargaining coverage (%) (share of all workers in TAW covered by all types of CB)	Comment (qualitative assessment)
AT	100	
BE	100	
BG	—	
CY	—	
CZ		There is only one collective agreement signed directly with TWAs. There are some TAW workers organised in the TUs, but they negotiate conditions only with user companies. The exact numbers of TAW workers organised in TUs are not known. In the report <i>The course of collective bargaining within the ČMKOS</i> (ČMKOS is the largest trade union centre in Czechia), there are only fragmentary mentions of individual TUs in terms of whether they bargain collectively for agency workers and whether they have any such members at all. The TUs overwhelmingly agree that they do not have such members, or do not register them, and therefore do not bargain for them.
DE	100	
DK	90 (estimate)	The TAW sector is very organised. Most companies of importance are members of an EO, which means that they have collective agreements negotiated by the EO on their behalf.
EE	—	
EL	0 (estimate)	
ES	100	
FI	Almost 100	Almost all workers are covered by CB. Many sectors have a universally binding CB agreement. If they do not, most companies have sector-related MEB agreements. All white-collar office workers are covered by the universally binding collective agreement for the personnel sector.
FR	100	
HR	—	
HU	0	
IE		Collective agreements, as they pertain to agency workers, can be indirectly applied across the spectrum of basic working and employment conditions – mainly pay – as required by law. This is on the basis of equity between agency workers and the other employees of the hirer company. A 2012 act prohibits collective agreements from including restrictions on the use of agency workers that are not ‘in the general interest’, such as health and safety considerations. Employees in the sector are covered by collective agreement for specific contracts. This is known as insource provision.

Member State	Estimated collective bargaining coverage (%) (share of all workers in TAW covered by all types of CB)	Comment (qualitative assessment)
IT	Most likely 100	There are two sector-level collective agreements signed with the two EOs, which are also engaged in company-level collective bargaining.
LT	0	
LU	100	
LV	0	
MT	15 (very rough estimate based on the information provided by interviewees)	
NL	85	
PL	No data	
PT	20	
RO	—	
SE	80–90	
SI	0	There is no CB for the TAW sector.
SK	0	There is no CB for the TAW sector. However, some TAW workers who are mainly assigned to large enterprises (where CB usually exists) are covered by the provisions of collective agreements. However, a qualified estimate of the number of TAW workers covered by these agreements is not available.

Notes: CB, collective bargaining; EO, employer organisation; TU, trade union. Table covers answers to the question ‘Estimate the share (%) of all workers in the TAW sector covered by collective bargaining in your country (both sector-related multi-employer bargaining (MEB) for temporary agency work sector or any other sector in which TAW [workers] are employed and single-employer bargaining (SEB) at company level in the temporary agency work sector or any other sector in which TAW [workers] are employed in your country).’ It should be noted that, in many Member States, the scope of CB is influenced by the national regulations on equal treatment and equal pay.

Source: Network of Eurofound Correspondents, 2023.

Importantly, not all collective agreements are applicable to all sectors where TAW workers are employed. On the one hand, in Member States like Belgium, France, Luxembourg and Sweden, the agreements are applicable to all subsectors in which TAW workers are employed. On the other hand, in Austria and Sweden, the applicability is limited to blue- or white-collar employees, respectively. Similarly, when it comes to the coverage of TAW staff employed in TWAs of various sizes (measured by the number of employees) in Member States where agreements are generally applicable, the agreements cover companies of all sizes (Austria, Belgium, Denmark, France, Luxembourg, the Netherlands, Sweden). In Malta, the agreements only apply to companies employing more than 250 employees.

Overall, collective bargaining practices differ between Member States and are dependent on country-level contexts and industrial relations systems. Diverse regulations on TAW work at the national level have implications for the different mechanisms for collective bargaining and the interest representation of both TWAs and TAW workers. For a detailed overview, see the country pages in

Annex 2 of this report, which serve as an important overview of national contexts in TAW in this representativeness study.

2.4.2. Consultation with the government

Table 37 presents a matrix of Member States by type of government consultation on TAW-related issues undertaken with the social partners. At least one trade union and at least one employer organisation / business association are consulted in 10 Member States: Austria, Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Slovenia and Sweden. At least one employer organisation / business association but no trade unions are consulted in four Member States, mostly central and eastern Member States. None of the social partners are consulted in the four other Member States, and the rest for which we have data either lacks representation on the employer or trade union side.

Table 37: Consultation of employers and trade unions, by Member State

	At least one trade union consulted	No trade union consulted	No information	No trade unions
At least one employer organisation / business associations consulted	AT, BE, DE, DK, FI, FR, IT, NL, SE, SI	HU, ES, LV, RO, SK	CZ, PL, IE	LT
No employer organisation / business associations consulted	MT	BG, LU, PT		EE, HR
No information				EL
No employer organisations / business associations				CY

Note: Data collected in 2023.

Source: Network of Eurofound Correspondents, 2023.

2.4.3. Tripartite and bipartite social dialogue bodies

Finally, an important characteristic and indispensable element of industrial relations is social dialogue and its institutions. In total, 11 Member States report involvement in social dialogue structures, of which 3 report bipartite and 7 report tripartite permanent TAW-sector-related social dialogue institutions. For Italy, the existence of social dialogue between the social partners and the government was confirmed, but the names or domains of activity of these bodies were not specified (see Table 38).

The three Member States with bipartite permanent social dialogue bodies are Austria, Belgium and France. In Austria, the dialogue is conducted in a bipartite setting but is supervised by the Federal Ministry of Labour and Economy. The Social and Further Training Fund (Sozial- und Weiterbildungsfonds) focuses mainly on subsidising further training activities for TAW. In France, social partners conduct bilateral dialogue focusing on negotiating agreements and amendments to the branch-level agreements, identifying company-level collective agreements, drawing up annual reports and issuing opinions on the interpretation of branch-level agreements. In Austria their existence is based on law, while in Belgium it relies on social partners' agreement and in France on both.

The seven Member States with tripartite permanent TAW-related social dialogue bodies are Finland, Luxembourg, the Netherlands, Poland, Portugal, Slovenia and Spain. In six of these Member States, the bodies have a statutory basis, while in Spain it is agreement based. Usually, they take the form of dedicated committees or councils. In Finland, they operate as working groups within the Ministry of Economic Affairs and Employment, while in Spain it is a dedicated TAW Working Group within the National Commission for Health and Safety at Work.

Table 38: Tripartite and bipartite social dialogue bodies through which sector-related issues are dealt with or in which sector-related social partners are involved

Member State	Social dialogue body	Bipartite/ tripartite	Domain of activity	Origin: agreement/ statutory	Sectoral trade unions participating	Sectoral employer organisations participating
AT	Social and Further Training Fund (Sozial- und Weiterbildungsfonds)	Bipartite (but supervised by the Federal Ministry of Labour and Economy)	Further training	Statutory (laid down in legislation – Arbeitskräfte-überlassungsgesetz)	Yes, both the GPA and PRO-GE	Yes, the mandatory FVGd
BE	JC322	Bipartite	Joint committee	Agreement	ACV-CSC BIE, ACV-CSC Puls, ACV-CSC CNE, ACV-CSC METEA, ACV-CSC Transcom, ABVV-FGTB Metaal, ABVV-FGTB Horval, ABVV-FGTB ACCG, ABVV-FGTB BBTK-SETCA, ACLVB-CGSLB	Federgon, VBO-FEB
ES	National Commission for Health and Safety at Work – TWA Working Group	Tripartite	Occupational health and safety (risk assessment, prevention and enforcement)	Agreement (2007)	UGT, CCOO	Aempleo
FI	Working groups in the Ministry of Economic Affairs and Employment	Tripartite	Legislation and the labour market	Statutory	ERTO	Confederation of Finnish Industries (Elinkeinoelämän keskusliitto (EK)) and HELA
FR	Joint Standing Committee for Negotiation and Interpretation (Commission paritaire permanente de négociation et d'interprétation (CPPNI))	Bipartite	Negotiating agreements and amendments to the branch-level agreements, identifying company collective agreements, drawing up annual reports and issuing opinions on the interpretation of branch-level agreements	Statutory and agreement	CGT Intérim, UNSA FCS, CFTC – CSFV, FS-CFDT, FEC FO, CFE-CGC FNECS (SNES)	Prism'emploi

IT	The existence of social dialogue between the social partners and the government is confirmed, but the names or topics of these bodies were not specified	N.A.			NIDIL CGIL, FELSA CISL, Uiltemp	Assolavoro, Assosomm
LU	Standing Committee on Labour and Employment (Comité permanent du travail et de l'emploi)	Tripartite	Employment in general	Statutory, based on 2007 law	Yes	Yes
NL	Social Economic Council (Sociaal Economische Raad (SER))	Tripartite	Social-economic policy in general (all domains)	Statutory, since 1950, based on the Law on Social Economic Council	FNV (8 seats), CNV (2 seats), VCP (1 seat)	VNO-NCW (7 seats), MKB-Nederland (3 seats), LTO Nederland (1 seat)
PL	Social Dialogue Council (Rada Dialogu Społecznego (RDS))	Tripartite	National tripartite dialogue body (cross-sectoral, not dedicated to TAW)	Statutory	Solidarność	OKAP (through Employers of Poland)
PT	There is no specific social dialogue body for TAW. However, there is a general tripartite social dialogue body that covers all sectors, including TAW: the Standing Committee for Social Concertation (Comissão Permanente de Concertação Social (CPCS))	Tripartite	All sectors	Statutory based on Law 108/91, Article 9, and the Labour Code, Article 471	CGTP, UGT	CIP, CCP, CAP, CTP; the EO for TWAs, Apespe RH, is affiliated through the CCP
SI	Expert Committee to Monitor the Performance of the Activity	Tripartite	Monitoring the TAW sector and adopting recommendations for regulation	Statutory	Two of the representative TUs	Two of the representative EOs

Notes: EO, employer organisation; TU, trade union. N.A.; not available.

Source: Network of Eurofound Correspondents, 2023.

2.5. Paritarian organisations in temporary agency work

Sector-related social partner organisations may also be involved in paritarian organisations, which are social protection institutions established and managed by trade unions and employers or employer organisations on a joint basis, usually within the framework of collective agreements (although their origins may also be statutory). These institutions are not-for-profit organisations that deal with topics and issues related to retirement schemes and pension funds, complementary healthcare insurance, paid holiday schemes, health and safety at work / occupational health, vocational education and training, unemployment benefit funds and some other issues. Paritarian organisations are characterised by their joint management by social partners on an equal or parity basis, which means

that the governance of these institutions is based on the equal representation of employers and employees in their governing bodies.

There are several paritarian (bipartite) organisations established by social partners in the TAW sector, but these are limited to a small number of Member States. In total, 12 organisations were identified in five Member States: Belgium, France, Italy, the Netherlands and Sweden. France (4), Italy (2) and the Netherlands (4) have more than one paritarian organisation in the sector. In all these five Member States, cooperation among social partners in the TAW sector is strong in terms of participation in social dialogue and collective bargaining. In the Netherlands, the Foundation for Examinations in the Temporary Agency Sector (Stichting Examens Uitzendbranche (SEU)) is 'the only independent examination institute in the temporary employment sector' and its board is composed of employers and employee representatives (SEU, undated). Trade unions were not signatory parties of the initial agreement that established this organisation, and they formally withdrew from the foundation board in 2024 due to difficulties in reaching collective agreement (see Table 39).

Notably, most of these organisations were established in the late 1990s / early 2000s. However, the Social Fund of TAW in Belgium and the organisation AKTO in France were established by trade unions and employers through multi-employer collective agreements in 2020 and 2019, respectively. Half of the organisations have domains of activity covering cooperation around issues in vocational education and training.

Representativeness of the European social partner organisations: Temporary agency work sector

Table 39: Paritarian organisations in the TAW sector

Member State	Name	Origin: type of agreement (SEB, MEB, MSB/CSB)	Founding year	TUs represented	EOs/BAs represented	Domain of activity							Membership of organisation	
						Pension fund	Health and provident funds	Paid holiday scheme	Occupational health	Vocational education and training	Employment and unemployment	Other domains	European Association of Paritarian Institutions (AIEP)	Other EU organisations
BE	Social Fund of TAW	MEB	2020	ACV-CSC BIE, ACV-CSC Puls, ACV-CSC CNE, ACV-CSC METEA, ACV-CSC Transcom, ABVV-FGTB Metaal, ABVV-FGTB Horval, ABVV-FGTB ACCG, ABVV-FGTB BBTK-SETCA, ACLVB-CGSLB	Federgon, VBO-FEB ⁽²⁷⁾				x	x	x		No	No
FR	AKTO	MSB/CSB	2019	In the TAW sector: CGT Intérim, UNSA FCS, CFTC Interim, FS-CFDT, FEC FO, CFE-CGC FNECS (SNES)	In the TAW sector: Prism'emploi					x			No	No
FR	Temporary Work Social Action Fund (Fonds d'Action Sociale du Travail Temporaire (FAST))	MEB	1992	CGT Intérim, UNSA FCS, CFTC Interim, FS-CFDT, FEC FO, CFE-CGC FNECS (SNES)	Prism'emploi		x					x ⁽²⁸⁾	No	No
FR	Observatory of Temporary Work and Recruitment (L'Observatoire de l'intérim et du recrutement)	MEB	2014	CGT Intérim, UNSA FCS, CFTC Interim, FS-CFDT, FEC FO, CFE-CGC FNECS (SNES)	Prism'emploi					x	x		No	No
FR	Professional Fund for Temporary Work Employment (Fonds Professionnel pour l'Emploi dans le Travail Temporaire)	MEB	1996	CGT Intérim, UNSA FCS, CFTC Interim, FS-CFDT, CFE-CGC FNECS (SNES)	Prism'emploi					x			No	No

⁽²⁷⁾ In the sectoral funds, the employers are represented by Federgon. VBO-FEB was a signatory party of the original multi-employer, sector-level collective bargaining agreement that established the fund.

⁽²⁸⁾ The body runs the branch-level social policy for the benefit of the 2.6 million people who, over the course of a year, carry out at least one temporary work assignment.

Representativeness of the European social partner organisations: Temporary agency work sector

IT	National Bilateral Agency for Temporary Work (Ente Bilaterale Nazionale per il Lavoro Temporaneo (Ebitemp))	MEB	1998	NIDIL CGIL, FELSA CISL, Uiltemp	Assolavoro, Assosomm	x	x	x	x		x		No	No data
IT	Fund for Training and Income Support for Temporary Workers (Fondo per la formazione e il sostegno al reddito dei lavoratori in somministrazione (Forma.Temp))	MEB	2000	NIDIL CGIL, FELSA CISL, Uiltemp	Assolavoro, Assosomm					x			No	No
NL	Foundation Fund Temporary Agency Sector (Stichting Fonds Uitzendbranche (SFU))	MEB	2004	FNV, CNV, LBV, De Unie	ABU, NBBU				x			x ⁽²⁹⁾	No	N.A.
NL	STIPP ⁽³⁰⁾	MEB	1999	FNV, CNV, De Unie	ABU, NBBU	x							No	N.A.
NL	Labour Standards Foundation (Stichting Normering Arbeid (SNA))	MEB	2005	Involved in negotiations: FNV and CNV (however, they left the foundation in 2016 over failure to reach agreement)	ABU, NBBU							x ⁽³¹⁾	No	N.A.
NL	SEU	MEB	1998	None	ABU, NBBU					x		x ⁽³²⁾	No	N.A.
SE	Authorisation of Staffing Companies	MEB ⁽³³⁾	2008	Unionen, LO, SACO	Competence Agencies of Sweden (Kompetens-företagen), selected companies							x ⁽³⁴⁾	No	N.A.

Notes: CSB, cross-sector bargaining; EO, employer organisation; MEB, multi-employer bargaining; MSB, multi-sector bargaining; SEB, single-employer bargaining; TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

⁽²⁹⁾ Compliance.

⁽³⁰⁾ Pension funds.

⁽³¹⁾ Certifications and norms.

⁽³²⁾ Examinations.

⁽³³⁾ This is a requirement for companies to become members.

⁽³⁴⁾ Authorisation.

3. European level of interest representation

This chapter presents an overview of the representativeness of the European-level social partners in TAW. There are two social partners currently listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU: on the part of the trade unions, **UNI Europa Agency Workers** represents the workforce of this sector, while employers are represented by **WEC-Europe**.

The representativeness of the European-level social partners is assessed in three ways. First, the membership strengths of the European-level social partner organisations on both sides are examined, based on the membership domains covered by their national affiliates (in Section 3.1 for trade unions and Section 3.4 for employer organisations).

Second, the analysis covers their capacity to negotiate on behalf of their affiliates, which means their ability to act on behalf of their members and to conclude binding agreements or commit to actions that can be implemented or monitored EU-wide. This capacity to negotiate depends directly on the involvement of their affiliates in collective bargaining at the national level, which ensures not only that they can provide an effective mandate for discussion and negotiation at the European level, but also that they are in a position to implement European-level agreements. The analysis of their representativeness is also based on their effective participation in social dialogue bodies (assessed in Section 3.1 for trade unions and Section 3.4 for employer organisations).

Finally, the analysis considers the limits of the representativeness of the social partners active in the TAW sector, which are assessed in two ways. First, the analysis looks at the national organisations not represented by the recognised social partners at the EU level (in Section 3.2 for trade unions not affiliated to UNI Europa Agency Workers and Section 3.5 for employer organisations not affiliated to WEC-Europe). Second, it compares the social partners with other European trade unions (Section 3.3) and employer organisations (Section 3.6).

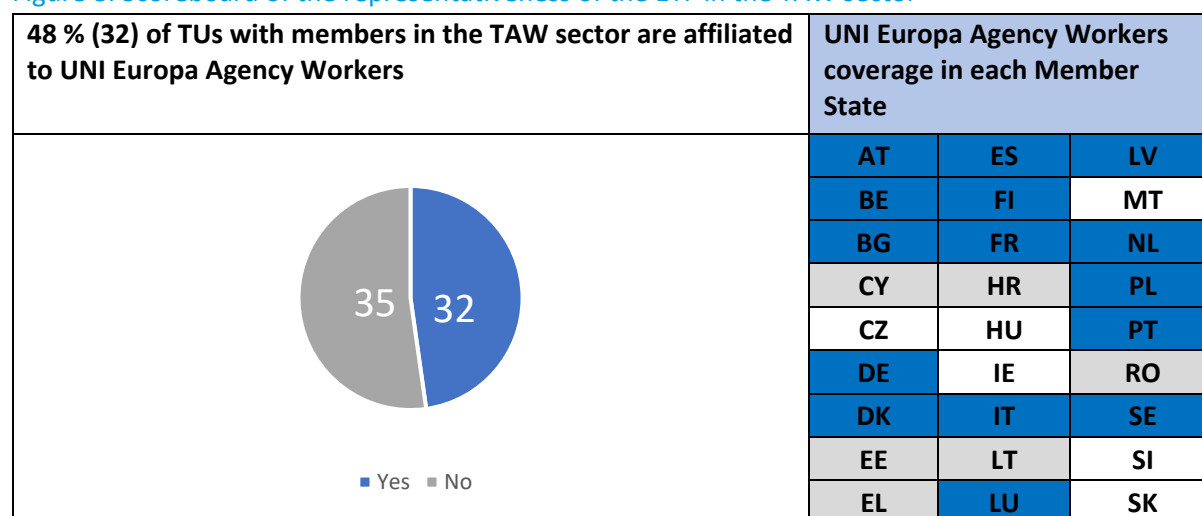
3.1. Representativeness of UNI Europa Agency Workers

The recognised social partner for TAW at the EU level is UNI Europa Agency Workers. At the general level, UNI Europa represents 272 national trade unions in 50 countries and covers the vast sector of private services, being involved in an array of subsectors including commerce, banking insurance and central banks, gaming, graphical and packaging, hair and beauty, information and communication technology services, media, entertainment and arts, postal services and logistics, private care and social insurance, industrial cleaning and private security, professional sport and leisure, professionals/managers and TAW workers. As a regional affiliate of UNI Global, UNI Europa represents the largest region in the organisation. UNI Europa is organised by sector and region. Each sector and region is directly represented on the Executive Committee.

For TAW, UNI Europa has its own section on agency workers, which ‘aims to improve the conditions of temporary agency staff and ensure equal treatment for temporary agency workers in Europe’ (UNI Europa, undated).

Of the 67 trade unions in 21 Member States, 32 trade unions (48 %) are affiliated to UNI Europa Agency Workers for their members in the TAW sector (see Figure 8). This means that the majority of unions in the TAW sector are not affiliated to UNI Europa Agency Workers, the EU-level organisation representing their interests on the ESSDC for TAW. It should be noted that some unions with zero TAW members – as is the case with CITUB (Bulgaria) and LKDAF (Latvia) – are still included in the overall count due to their affiliation to UNI Europa Agency Workers. If they are not counted, the total number of relevant trade unions drops to 65, and the percentage increases to 49 % of UNI Europa Agency Workers affiliates. **Nevertheless, it is safe to conclude that the distribution is more or less equal and that about half of all unions are members of UNI Europa Agency Workers.**

Figure 8: Scoreboard of the representativeness of the ETF in the TAW sector



Notes: TU, trade union. Blue shading in cells indicates Member States in which UNI Europa Agency Workers has a member TU; cells with grey shading indicate Member States with no TUs; cells with no shading indicate Member States with TUs not represented by UNI Europa Agency Workers. Note that, in Poland, Solidarność is listed as a member of UNI Europa Agency Workers, but this was not confirmed by Solidarność.

Source: Network of Eurofound Correspondents, 2023.

The abovementioned 32 trade unions are active in 15 Member States: Austria, Belgium, Bulgaria, Denmark, Finland, France, Germany, Italy, Latvia, Luxembourg, the Netherlands, Poland, Portugal, Spain and Sweden (see Figure 8). There are no unions organising or representing TAW workers in Croatia, Cyprus, Estonia, Greece, Lithuania and Romania. The Member States with trade unions that are not affiliated to UNI Europa Agency Workers are Czechia, Hungary, Ireland, Malta, Slovakia and Slovenia. Trade unions that are not represented on the ESSDC for TAW by UNI Europa Agency Workers are discussed separately in Section 3.2.

UNI Europa Agency Workers affiliates cover TAW workers in various sectors, which again confirms that TAW cuts across many industrial sectors (see Table 40 and Table 41). The (sub)sectors with the highest rates of coverage by trade unions affiliated to UNI Europa Agency Workers are private services (27 unions in 11 Member States), audiovisual (25 unions in 11 Member States) and commerce (25 unions in 11 Member States). The sectors with the lowest rates of coverage are education (22 unions in 10 Member States) and human health / hospitals (21 unions in 9 Member States). The distance between the most and least covered (sub)sectors is not large, and rates of coverage in terms of trade unions affiliated to UNI Europa Agency Workers covering the sector range from 66 % (human health /

hospitals) to 84 % (private services). In terms of Member State coverage by (sub)sector, between 8 and 11 Member States are covered by unions affiliated to UNI Europa Agency Workers in the TAW sector. All in all, this reflects a rather uniform pattern of trade union coverage in various industries and Member States, albeit with a significant margin for improvement in coverage.

Table 40: Overview of the sector-relatedness of trade unions affiliated to UNI Europa Agency Workers

	Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	Other sectors
All TUs	67														
TUs affiliated to UNI Europa Agency Workers out of the 67 TUs	32 (48 %)														
TUs affiliated to UNI Europa Agency Workers and covering the sector	22	22	21	22	25	22	23	23	23	24	27	24	25	23	11
Out of the 32 TUs affiliated to UNI Europa Agency Workers (%)	69	69	66	69	78	-69	72	72	72	75	84	75	78	72	34
Out of all 67 TUs (%)	33	33	31	33	37	33	34	34	34	36	40	36	37	33	16
Number of Member States with TUs affiliated to UNI Europa Agency Workers and covering the sector	10	10	9	10	11	9	10	10	10	11	11	10	11	10	8

Note: TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

Representativeness of the European social partner organisations: Temporary agency work sector

Table 41: Sector-relatedness of national trade unions affiliated to UNI Europa Agency Workers – full details

Member State	TU name	TU abbreviation	Member of UNI Europa Agency Workers	Sector															Other sectors
				Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance		
AT	GPA	GPA	Yes	x	x		x	x		x	x		x	x	x	x	x	x (any white-collar sector)	
BE	Algemene Centrale der Liberale Vakbonden van België	ACLVB-CGSLB	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (all in which TAW is used)	
BE	ACV-CSC Puls	ACV-CSC Puls	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
BE	ACV-CSC Food and Services	ACV-CSC Food and Services	Yes					x		x				x	x	x	x		
BE	ABVV-FGTB Federation of White-collar Workers, Technicians and Professional and Managerial Staff	ABVV-FGTB BBTk-SETCA	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
BE	ABVV-FGTB General Federation	ABVV-FGTB ACCG	Yes					x	x					x	x				
BG	Confederation of Independent Trade Unions of Bulgaria	CITUB	Yes																
DE	United Services Trade Union	ver.di	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
DK	HK Privat	HK Privat	Yes	x	x	x	x	x	x	x	x (not drivers – x applies to administration, human resources, etc.)	x	x	x	x	x	x	x (all sectors; HK Privat organises salaried employees in all sectors)	
ES	Mobility, Consumption and Services Federation of the General Union of Workers	FESMC-UGT	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
ES	Services Federation – Workers’ Commissions	CCOO – Servicios	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x		

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Member of UNI Europa Agency Workers	Sector														Other sectors
				Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	
FI	Service Union United	PAM	Yes					x (yes; in the retail and wholesale trade: 1.8 %)										x (security sector, accommodation and food services sector, property management sector)
FR	General Confederation of Labour – Interim	CGT Intérim	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
FR	French Democratic Labour Confederation – Services Federation	FS-CFDT	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
FR	French Confederation of Christian Workers – CSFV	CFTC – CSFV	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
FR	Employees and Managers' Federation – General Confederation of Labour – Force Ouvrière (CGT-FO)	FEC FO	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
IT	New Identities of Work in the Italian General Confederation of Labour	NIDIL CGIL	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (sport sector)
IT	Federation of Italian Trade, Hotel, Canteen and Service Workers in the Italian General Confederation of Labour	FILCAMS CGIL	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
IT	Federation of Self-employed and Atypical Workers in the Italian Confederation of Workers' Unions	FELSA CISL ^(a)	Yes ^(a)	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (sport sector)

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Member of UNI Europa Agency Workers	Sector															Other sectors
				Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance		
IT	Italian Confederation of Tertiary Trade Unions in the Italian Confederation of Workers' Unions	FIST CISL ^(b)	Yes ^(b)	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
IT	Temporary Autonomous Atypical Workers in the Italian Union of Labour	Uiltemp ^(b)	Yes ^(b)	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (sport sector)	
IT	Italian Union of Tourism Trade Workers	UILTuCS	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
LU	Luxembourg Confederation of Independent Trade Unions (Services and Energy)	OGB-L	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (unions cover TAW workers in all sectors but the private security sector)	
LV	Trade Union of Culture Sector of Latvia	LKDAF	Yes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
NL	Federation of Dutch Trade Unions	FNV	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x			
PL	Solidarity (Solidarność)	Solidarność ^(b)	Yes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
PT	Democratic Union of Postal, Telecommunications, Media and Services Workers	Sindetelco	Yes									x		x		x		x (telecommunications, call centres, logistics and private security sectors)	
PT	National Trade Union of Telecommunications and Audiovisual Workers	Sinttav	Yes										x	x		x	x	x (telecommunications, multimedia, communication, information, arts, culture, technology and services sectors)	

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Member of UNI Europa Agency Workers	Sector														Other sectors
				Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	
PT	Trade Union of Service Sector Workers	SITESE	Yes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
SE	Unionen	Unionen	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
SE	Swedish Union for Service and Communications Employees	SEKO	Yes								x	x	x	x				
SE	Sveriges Ingenjörer	Sveriges Ingenjörer ^(b)	Yes	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (all sectors, white-collar work only)

^(a) FELSA CISL is listed as a member of UNI Europa Agency Workers, but this was not confirmed by UNI Europa Agency Workers.

^(b) In Italy, FIST CISL and Uiltemp are listed as members of UNI Europa Agency Workers by UNI Europa Agency Workers, but this was not confirmed at the national level. In Poland, Solidarność is also listed as a UNI Europa Agency Workers member, but this was not confirmed by Solidarność. In Sweden, Sveriges Ingenjörer claims not to be affiliated in relation to TAW workers.

Note: TU, trade union. n.d., no data.

Source: Network of Eurofound Correspondents, 2023.

Table 42 presents data on trade unions affiliated to UNI Europa Agency Workers based on the categories of workers they cover. **Of the 32 affiliated unions, 66 % organise TAW workers with short-term contracts, while 69 % cover the internal staff of TWAs.** Across all 67 unions active in TAW, 31 % cover employees with short-term contracts and 33 % cover internal staff. Furthermore, in 25 % of trade unions affiliated to UNI Europa Agency Workers (or 12 % of all unions), TAW workers must join another trade union when they receive a direct permanent contract from the hiring firm. However, many responses were conditional, suggesting that the real percentage may be higher. Full details for all the national affiliates can be found in Table 44.

Table 42: Categories of workers (type of contract) represented by trade unions affiliated to UNI Europa Agency Workers

	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)
Number of TUs	21	22	8 (many conditional replies, so more unions could be counted here)
Out of the 32 TUs affiliated to UNI Europa Agency Workers (%)	66	69	25
Out of all 67 TUs (%)	31	33	12
Number of Member States	10	10	4

Notes: TU, trade union. Answer 'yes' includes those unions where membership was indicated as 'theoretically possible' and those that organise all types of workers irrespective of the type of contract.

Source: Network of Eurofound Correspondents, 2023.

The majority of the members of UNI Europa Agency Workers cover all types of TWA companies in terms of the number of workers on assignment (see Table 43). Of all affiliates, 69 % cover companies with 50–249 employees and 66 % cover large enterprises (> 250 employees) and small employers (10–49 employees). **However, for almost a third (9) of the national unions affiliated to UNI Europa Agency Workers, full data on employee representation by company size were not available, so these percentages should be interpreted with caution.** Almost all affiliated unions cover the entire Member State (97 %, or 31 of 32 unions). Their geographical coverage is also similar, with 81 % of UNI Europa Agency Workers' affiliates having regional subdivisions of the national union. Full details for all the national affiliates can be found in Table 44.

Table 43: Trade unions affiliated to UNI Europa Agency Workers, by company size group and geographical coverage

	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
	1–9	10–49	50–249	> 250	Organising entire Member State (number of 'yes' responses)	Regional subdivisions (number of 'yes' responses)
Number of TUs	20	21	22	21	31	26
Out of the 32 TUs affiliated to UNI Europa Agency Workers (%)	63	66	69	66	97	81
Out of all 67 TUs (%)	30	31	33	31	46	39
Number of Member States	9	10	11	10	15	12

Notes: TU, trade union. Full data on representation in terms of company size were not available on affiliates from Bulgaria (CITUB), Italy (NIDIL CGIL, FILCAMS CGIL, FELSA CISL, FIST CISL, Uiltemp, UILTuCS), Poland (Solidarność) and Portugal (SITESE). In Belgium, unions organising only the Dutch-speaking part were not counted as unions organising the whole Member State. In Bulgaria, the union covers the whole Member State but currently no TAW workers are organised or affiliated.

Source: Network of Eurofound Correspondents, 2023.

Representativeness of the European social partner organisations: Temporary agency work sector

Table 44: Membership coverage of national trade unions affiliated to UNI Europa Agency Workers – full details

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
AT	GPA	Yes	Yes (in principle) – zero-hour contracts are not allowed	No – internal staff who are white-collar employees are organised by PRO-GE	This depends on the sector in which the employer company is active. If the activities lie within PRO-GE's realm (e.g. manufacturing), the membership can be maintained. If the activities are in another sector (e.g. transport – covered by Vida), then a solution is found between the two unions	Yes	Yes	Yes	Yes	Yes	Yes
BE	ACLVB-CGSLB	Yes	Yes	Yes	No, as ACLVB-CGSLB organises all of its sectors as a confederation	Yes	Yes	Yes	Yes	Yes	There are regional structures, but all work under the umbrella of the confederation
BE	ACV-CSC Puls	Yes	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	Yes	Yes	Yes	Yes	Only the Dutch-speaking part	Yes
BE	ACV-CSC Food and Services	Yes	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	Yes	Yes	Yes	Yes	Yes	There are regional structures, but all work under the umbrella of the federation
BE	ABVV-FGTB BBTK-SETCA	Yes	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as	Yes	Yes	Yes	Yes	Yes	There are regional structures, but all work under the

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
					all federations have representation within the TAW sector, this is not exactly a conversion						umbrella of the federation
BE	ABVV-FGTB ACCG	Yes	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	Yes	Yes	Yes	Yes	Yes	There are regional structures, but all work under the umbrella of the federation
BG	CITUB	Yes	N.A.	N.A.	Direct meetings are held with potential members to provide an explanation of the benefits of becoming members of the TU	N.A.	N.A.	N.A.	N.A.	Yes, but currently does not organise TAW workers	Yes – the TU has regional councils in all 28 districts in the Member State
DE	ver.di	Yes	No – this is excluded by the collective agreements	Yes	Yes – for example, this would be the case if they were working for a TWA with a company agreement negotiated by ver.di but were assigned to a car producer where IG Metall organises the workers (e.g. Brunel)	Yes	Yes	Yes	Yes	Yes	ver.di is organised in state districts that are, in most cases, within the borders of the German federal states, except for the ver.di state districts of Lower Saxony / Bremen; North (Schleswig-Holstein and Mecklenburg-Western Pomerania); Rhineland-Palatinate / Saarland; and Saxony, Saxony-Anhalt and Thuringia
DK	HK Privat	Yes	Yes – it covers TAW	Yes – HK Privat traditionally	No – because the TAW worker will be hired to	Yes	Yes	Yes	Yes	Yes	Local departments are connected to the

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1-9	10-49	50-249	> 250	Organising entire Member State	Regional subdivisions
			workers with short-term assignments (e.g. one day), but not zero-hour contracts	organises clerical employees (administration, human resources, etc.)	perform a job that belongs to the same union that sends out the TAW worker and is under the same sectoral agreement						main organisation (and are in direct contact with headquarters)
ES	FESMC-UGT	Yes	The union organises all types of TAW workers, but the unionisation of workers on very short assignments is 'almost an impossible task', according to the union	Yes – most of the membership is made up of internal staff, with more stable employment conditions	Yes – as long as they continue working in the same sector / union domain	Yes	Yes	Yes	Yes	Yes	Yes – the TU has a territorial structure in all Spanish regions (autonomous communities)
ES	CCOO – Servicios	Yes	The union organises all types of TAW workers, but the unionisation of workers on very short assignments is 'almost an impossible task', according to the union	Yes – most of the membership is made up of internal staff, with more stable employment conditions	Yes – as long as they continue working in the same sector / union domain	Yes	Yes	Yes	Yes	Yes	Yes – the TU has a territorial structure in all Spanish regions (autonomous communities)

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
FI	PAM	Yes	Yes	Yes	No, because the TU is sector specific and is thus the TU for workers in the services sector, independent of the form of employment	No	No	Yes	No	Yes	Yes – there are structures that are occupational and regional
FR	CGT Intérim	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
FR	FS-CFDT	Yes	Yes	Yes	A TAW worker who is hired to fill a permanent position in their hiring company joins the TU federation that covers the company's activities	Yes	Yes	Yes	Yes	Yes	Yes
FR	CFTC – CSFV	Yes	Yes	Yes	A TAW worker who is hired to fill a permanent position in their hiring company joins the TU federation that covers the company's activities	Yes	Yes	Yes	Yes	Yes	Yes in a few regions (Aquitaine, Occitania, Réunion)
FR	FEC FO	Yes	Yes	Yes	A TAW worker who is hired to fill a permanent position in their hiring company joins the TU federation that covers the company's activities	Yes	Yes	Yes	Yes	Yes	Yes – through FO Service at the departmental level (in about 30 departments)

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
IT	NIDIL CGIL	Yes	Yes	N.A.	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a TU at any time	N.A.	N.A.	N.A.	N.A.	Yes	Yes – in addition to its national structure, NIDIL CGIL has regional substructures and sections within the Chamber of Labour that coincide with the provinces

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
IT	FILCAMS CGIL	Yes	No	Yes – this union is more related to directly employed labour agency workers and not TAW workers	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time	N.A.	N.A.	N.A.	N.A.	Yes	Yes – in addition to its national structure, FILCAMS CGIL has regional substructures and sections within the Chamber of Labour that coincide with the provinces
IT	FELSA CISL	Yes	Yes	N.A.	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and	N.A.	N.A.	N.A.	N.A.	Yes	Yes – in addition to its national structure, FELSA CISL has regional substructures and sections within the Chamber of Labour that coincide with the provinces

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
					workers can choose to join or leave a union at any time						
IT	FIST CISL	Yes	No	Yes – this union is more related to directly employed labour agency workers and not TAW workers	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time	N.A.	N.A.	N.A.	N.A.	Yes	Yes – in addition to its national structure, FIST CISL has regional substructures and sections within the Chamber of Labour that coincide with the provinces

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
IT	Uiltemp	Yes	Yes	N.A.	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time	N.A.	N.A.	N.A.	N.A.	Yes	Yes – in addition to its national structure, Uiltemp has regional substructures and sections within the Chamber of Labour that coincide with the provinces
IT	UILTuCS	Yes	No	Yes – this union is more related to directly employed labour agency workers and not TAW workers	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time	N.A.	N.A.	N.A.	N.A.	Yes	Yes – in addition to its national structure, UILTuCS has regional substructures and sections within the Chamber of Labour that coincide with the provinces
LU	OGB-L	Yes	No	No	No – the worker can continue to be a member of the same TU	Yes	Yes	Yes	Yes	Yes	No

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
LV	LKDAF	Yes	Not relevant, as it has no members	Not relevant, as it has no members	Not relevant, as it has no members	Not relevant	Not relevant	Not relevant	Not relevant	Yes	N.A.
NL	FNV	Yes	Yes – most are in phase A (zero-hour contracts)	Yes, but not actively since it proves impossible to negotiate a collective bargaining agreement for this group; it is more a case of individual advocacy	No – they move to a different sector within FNV	No	Yes	Yes	Yes	Yes	N.A.
PL	Solidarność	Yes	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	Yes	Yes
PT	Sindetelco	Yes	No information obtained	Yes	Not automatically. The workers in the sectors within Sindetelco's domain (postal services, logistics, telecommunications, media, graphics, call centres, temporary work and private security) can continue their membership. Although these sectors are named in the union's statutes, Sindetelco's domain also covers, in principle, other services. Therefore, it seems to be highly improbable that a member would be obliged to leave the union after the conversion of their job	Yes	Yes	Yes	Yes	Yes	Sindetelco's statutes stipulate that the union has four regional delegations in mainland Portugal with their own assemblies and elected regional boards

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
PT	Sinttav	Yes	It is theoretically possible, because the statutes allow it, but rarely possible in practice because organising requires time and normally cannot be done in short periods of a few days	Yes	Not automatically. The workers in the sectors within Sinttav's domain (telecommunications, multimedia, audiovisual, communication, information, arts, culture, technology and services) can continue their membership. Although these sectors are named in the statutes, Sinttav's domain also covers, in principle, other services. Therefore, it seems to be highly improbable that a member would be obliged to leave the union after the conversion of their job	Yes	Yes	Yes	Yes	Yes	No
PT	SITESE	Yes	No information obtained	No information obtained	No information obtained	N.A.	N.A.	N.A.	N.A.	Yes	SITESE has four delegations in mainland Portugal. These delegations do not have political autonomy
SE	Unionen	Yes	Not really, because these contracts are exceedingly rare in Sweden. The norm is full-time contracts, with a salary	Yes	No. One exception is when workers are assigned to the public sector. Unionen only organises private sector workers, and, if someone is offered a job in a public sector workplace, they need to switch unions	Yes	Yes	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers (TAW workers on assignment)				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire Member State	Regional subdivisions
			paid between assignments. Some student members can have one-day contracts								
SE	SEKO	Yes	Yes	No	No – they remain members of their previous union. Membership is mainly tied to sector	Yes	Yes	Yes	Yes	Yes	Yes – the union has regional substructures: SEKO North Norrland, SEKO Middle Norrland, SEKO Gävle-Dala, SEKO Stockholm, SEKO Central Sweden, SEKO Western Sweden, SEKO South, SEKO West and SEKO Skåne, and also SEKO Sjöfolk (maritime workers)
SE	Sveriges Ingenjörer	Yes	Yes	Yes	No – they remain members of the same union	Yes	Yes	Yes	Yes	Yes	Yes – there are regional substructures for each member union. They organise locally with the union clubs and cover the entire Member State together

Note: TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

Data on the membership size of national unions affiliated to UNI Europa Agency Workers are scarce, and 17 of 32 unions did not report any data. Nevertheless, based on available data, 10 of the 32 affiliates reported that their membership is increasing and only one union recorded a decrease in its members (Table 45). The remaining four national unions with information available reported their membership as stable. Due to the lack of data on 17 of the 32 unions, only a limited picture can be provided in terms of estimated ranking of their position within the TAW sectors in their Member States. Full details for all the national affiliates can be found in Table 46.

Table 45: Membership trends and ranking of national trade unions affiliated to UNI Europa Agency Workers

	Total number of UNI Europa Agency Workers affiliates	Trend	Ranking in the national TAW sector
Number of TUs	32	Increasing: 10 Stable: 4 Decreasing: 1 No data: 17	Largest: 6 (FI, FR, NL, PT (2), SE) Second largest: 5 (AT, DE, DK, ES, FR) Third largest: 2 (ES, FR) No data or only a qualitative estimate: 19

Note: TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

In terms of organisational density, it is largely impossible to draw any conclusions about this characteristic, as the data on the share of the TAW workforce covered by the trade unions are largely missing and/or fragmented. Nevertheless, union densities for members of UNI Europa Agency Workers were calculated to provide at least some information. These take the forms of the TUD based on national employment and the EU TUD based on the share of TAW workers across the EU (see Table 46).

As can be seen from Table 46, unions that are members of **UNI Europa Agency Workers cover at least 53 215 TAW workers (although 59 % of members did not provide data on their membership)**. This equates to 21.1 % of the 251 896 workers covered by all identified trade unions in TAW (including unions that are not members of UNI Europa Agency Workers), bearing in mind that 49 % of all unions did not provide any data on their membership.

Based on this information, the TUD of all members of UNI Europa Agency Workers is at least 0.8 %, although the majority of unions did not report any membership data. In other words, based on the available data, only 0.8 % of the total number of TAW workers employed in the EU are members of UNI Europa Agency Workers member unions.

To further contextualise this using other estimates of total employment (see comparison IV in Table 6), the TUD of UNI Europa Agency Workers member unions is 1.2 % when overall EU employment is taken as 4 290 110 (EU-27, EU-LFS official) and 1.5 % when overall EU employment is taken as 3 522 789 (based on data from the SBS for NACE 78.2).

Based on the numbers above, it is clear that no reliable estimates can be calculated of the share of TAW workers who are members of unions affiliated to UNI Europa Agency Workers. The available data point to a TUD rate that starts somewhere between 0.8 % and 1.5 %, and this may be higher, given the missing data.

Table 46: Membership strength of national unions affiliated to UNI Europa Agency Workers – full details

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership	TUD (%) (national employment)	EU TUD (%) (EU employment)
AT	GPA	GPA	N.A.	Increasing	Second largest	0	0.00
BE	Algemene Centrale der Liberale Vakbonden van België	ACLVB-CGSLB	No data	No data	Smallest within the sector	0.7	0.09
BE	ACV-CSC Puls	ACV-CSC Puls	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	1.4	0.01
BE	ACV-CSC Food and Services	ACV-CSC Food and Services	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	12.9	0.12
BE	ABVV-FGTB Federation of White-collar Workers, Technicians and Professional and Managerial Staff	ABVV-FGTB BBTK-SETCA	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	1.6	0.19
BE	ABVV-FGTB General Federation	ABVV-FGTB ACCG	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	0.10	0.01
BG	Confederation of Independent Trade Unions of Bulgaria	CITUB	0	N.A.	N.A.	0	0.00

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership	TUD (%) (national employment)	EU TUD (%) (EU employment)
DE	United Services Trade Union	ver.di	6 000	Temporarily decreasing membership during COVID-19, but otherwise stable	Second largest	1.2	0.17
DK	HK Privat	HK Privat	500	Stable	Second largest	0.3	0.01
ES	Mobility, Consumption and Services Federation of the General Union of Workers	FESMC-UGT	N.A.	Increasing	Third largest	0.9	0.04
ES	Services Federation – Workers’ Commissions	CCOO – Servicios	N.A.	Decreasing	Second largest	< 0.03	0.00
FI	Service Union United	PAM	8 000	Increasing	Largest by estimation	11.2	0.15
FR	General Confederation of Labour – Interim	CGT Intérim	Confidential	Increasing	Appears to be the largest in the sector	1.8	0.02
FR	French Democratic Labour Confederation – Services Federation	FS-CFDT	12 300	Increasing	Second largest	0	0.00
FR	French Confederation of Christian Workers – CSFV	CFTC – CSFV	N.A.	N.A.	Third largest	0.7	0.09
FR	Employees and Managers’ Federation – General Confederation of Labour – Force Ouvrière (CGT-FO)	FEC FO	800–1 200	Increasing	Appears to be the fifth largest in the sector	1.4	0.01
IT	New Identities of Work in the Italian General Confederation of Labour	NIDIL CGIL	No data	No data	Among the three largest	12.9	0.12
IT	Italian Federation of Commerce, Tourism and Services Workers in the Italian General Confederation of Labour	FILCAMS CGIL	No data	No data	This union is more related to directly employed workers of employment agencies and not TAW workers	1.6	0.19
IT	Federation of Self-employed and Atypical Workers in the Italian Confederation of Workers’ Unions	FELSA CISL	No data	No data	Among the three largest	0.10	0.01
IT	Italian Confederation of Tertiary Trade Unions in the Italian Confederation of Workers’ Unions	FIST CISL	No data	No data	N.A. – this union is more related to directly employed workers of employment agencies and not to TAW workers	0	0.00

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership	TUD (%) (national employment)	EU TUD (%) (EU employment)
IT	Temporary Autonomous Atypical Workers in the Italian Union of Labour	Uiltemp	No data	No data	N.A.	1.2	0.17
IT	Italian Union of Tourism Trade Workers	UILTuCS	No data	No data	Among the three largest; this union is more related to directly employed workers of employment agencies and not TAW workers	0.3	0.01
LU	Luxembourg Confederation of Independent Trade Unions (Services and Energy)	OGB-L	Not possible to provide a number	Increasing (for the whole 'Services' section of the TU)	No indication, but, in general, OGB-L is the most important TU in the Member State	0.9	0.04
LV	Trade Union of Culture Sector of Latvia	LKDAF	0	N.A. (no members)	No members	< 0.03	0.00
NL	Federation of Dutch Trade Unions	FNV	11 000	Increasing	Largest	11.2	0.15
PL	Solidarity (Solidarność)	Solidarność	No data	No data	No data	1.8	0.02
PT	Democratic Union of Postal, Telecommunications, Media and Services Workers	Sindetelco	800	Increasing	Largest or second largest	0	0.00
PT	National Trade Union of Telecommunications and Audiovisual Workers	Sinttav	2 634	Increasing	Largest or second largest	0.7	0.09
PT	Trade Union of Service Sector Workers	SITESE	< 100	N.A.	N.A.	1.4	0.01
SE	Unionen	Unionen	9 581	Stable	Largest	12.9	0.12
SE	Swedish Union for Service and Communications Employees	SEKO	N.A. (member of LO)	No data	Not one of the largest	1.6	0.19
SE	Sveriges Ingenjörer	Sveriges Ingenjörer	1 500 (member of AHT)	Stable	N.A.	0.10	0.01
Total			53 215				
Total EU employment			6 543 095				0.81

Notes: TU, trade union. The total number of EU TAW workers (employment in TAW) used for these calculations is based on the national data provided by the Network of Eurofound Correspondents = **6 543 095**.

Sources: Network of Eurofound Correspondents, 2023; data on TUD, own calculations.

Despite the difficulties in organising TAW workers, the sectoral trade unions undertake various actions and make efforts to reach out to TAW workers and recruit or support them. In Austria, for instance, unions were supported by works councils, which have been actively campaigning for membership of the GPA. In Belgium, all ACV-CSC federations collaborate within the sector and present themselves to TAW workers by means of a single, more accessible point/organisation, 'Interim United'. For example, Interim United has a single site for all TAW workers interested in union activities instead of having separate ones for each of the federations. A similar move was undertaken by ABVV-FGTB BBTK-SETCA and ABVV-FGTB ACCG, which now function as a single ABVV-FGTB entity for TAW workers within the sector in order to reduce complexity and increase accessibility.

Sometimes, the organising efforts dedicated to TAW take the form of very basic and simple information campaigns. In Finland, there was no specific campaign targeting TAW workers, but the trade union clarified and pointed out that TAW workers can be organised in the same way as other workers in the sectors covered by the union. In France, a similar information service is being provided by FEC FO, whose only communication tools are a dedicated website and welcome booklets produced to inform temporary workers of their rights or how to obtain the value-sharing bonus (the 'Macron bonus'). Another union in France (CGT Intérim) has taken a different approach: the union is very active in defending wages and combating discrimination between temporary workers and permanent employees of hiring companies. In Italy, similar efforts are implemented by NIDIL CGIL, which tries to support workers in relation to various issues, such as help for young jobseekers; social security and welfare benefits; access to personal social services, disability and pensions; and the right to civil justice, adequate housing conditions and residence permits for immigrants in Italy or those going abroad. The Portuguese union Sinttav conducted a campaign for higher wages and more stable work contracts, and one of its tangible results was the conclusion of a SEB agreement with Intelcia in 2022. Similar measures were conducted by another Portuguese union, Sindetelco, which also campaigned for higher wages and more stable work contracts, but with a focus on TAW workers in the telecommunications sector.

In terms of their role and position in Member-State-level industrial relations in the TAW sector, the vast majority of trade unions affiliated to UNI Europa Agency Workers (29 or 90.6 %) are recognised as representative at the national level. Only one union, the LKDAF of Latvia, is clearly not representative for TAW workers. For the Finnish union PAM, the answer is a bit more complicated and depends on how the sector is defined. The union represents all of its members (TAW workers included), and the collective agreements it negotiates also cover TAW. This applies to trade unions that have TAW workers as members. At the same time, PAM does not represent the interests of only TAW workers in the negotiations. For Polish Solidarność, data are not available.

Overall, 17 out of 23 national unions affiliated to UNI Europa Agency Workers are involved in social dialogue bodies for the regulation of the TAW sector; the remaining unions have no such involvement or did not provide data. It should be kept in mind that this number reflects the fact that, in some Member States, TAW-sector-specific bodies do not exist, or social dialogue is weak or virtually non-existent. Taking this into consideration, the involvement of UNI Europa Agency Workers affiliates appears to be significant. Some of the unions affiliated to UNI Europa Agency Workers are also involved in bipartite or tripartite social dialogue related to other sectors and, at the cross-sectoral level, dealing with aspects of TAW.

One other measure of representativeness is the frequency with which trade unions are consulted by national governments on issues pertaining to a given sector and the policies regarding it. This is obviously not a perfect measure, as the decision to consult social partners remains with the national administration and may vary over time and depend on values and the political approach to social dialogue, thus being beyond control of the partners. Nevertheless, it provides some indication of representativeness. In this regard, more than half of the trade unions affiliated to UNI Europa Agency Workers are consulted by national governments on TAW-sector-related issues: **21 out of 32** (66 %) report being consulted by the government, among which 11 are consulted on a regular basis and 10 are consulted ad hoc (see Table 47). Full details for each organisation can be found in Annex 1.

Table 47: Overview of the industrial relations involvement of trade unions affiliated to UNI Europa Agency Workers

	Total number	Recognised as representative based on national recognition	Involved in bipartite/ tripartite social dialogue bodies	Consulted by government	Affiliated to a national confederation
Number of TUs	32	29	17	21	31
				Regularly: 11 (34.4 %)	No data / not applicable: 1 (3.1 %)
				Ad hoc: 10 (31.3 %)	
% of all TUs	100.0	90.6	53.1	65.6	96.8
Number of Member States	15 (AT, BE, BG, DE, DK, ES, FI, FR, IT, LU, LV, NL, PL, PT, SE)	12 (AT, BE, BG, DE, DK, ES, FR, IT, LU, NL, PT, SE)	7 (BE, DK, ES, FR, IT, LU, NL)	10 (AT, BE, DE, DK, ES, FI, FR, IT, NL, SE)	14 (AT, BE, BG, DE, DK, ES, FI, FR, IT, LU, LV, NL, PT, SE)

Notes: TU, trade union. See the country pages in Annex 2 for more details.

Source: Network of Eurofound Correspondents, 2023.

The representativeness status at the national level is directly reflected in the recognition of unions' ability to bargain collectively. Collective bargaining is one of the commonly recognised measurements of trade union position and strength, and it remains one of the strongholds of a trade union's position in national industrial relations. At the same time, collective bargaining coverage, occurrence, structures, patterns and practices differ greatly between the Member States and, as such, serve as an important dimension of industrial relations models/clusters (see, for example, Eurofound, 2018).

The majority of the trade unions affiliated to UNI Europa Agency Workers (24 or 75.0 %) are involved in some form of TAW-related collective bargaining at either the sector or company level or in

collective bargaining that covers (at least partially or indirectly ⁽³⁵⁾) the sectors in which TAW workers are employed. This is the case in Austria, Belgium, Denmark, Finland, Germany, Italy, Luxembourg, the Netherlands, Portugal, Spain and Sweden. Sector-level bargaining is reported by the majority of unions (17 or 53.1 %). Company-level bargaining is less common, with only 11 unions (34.4 %) from six Member States reporting it. The remaining unions are often not involved in collective bargaining because no such negotiations take place in general or specifically for the TAW sector (see Table 48).

Table 48: Involvement of trade unions affiliated to UNI Europa Agency Workers in collective bargaining

	Total number of TUs	Number of TUs involved in any CB	CB level ^(a)	
			Sector	Company
Number of TUs	32	24	17	11
% of all TUs	100.0	75.0	53.1	34.4
Number of Member States	15 (AT, BE, BG, DE, DK, ES, FI, FR, IT, LU, LV, NL, PL, PT, SE)	12 (AT, BE, DE, DK, ES, FI, FR, IT, LU, NL, PT, SE)	11 (AT, BE, DE, DK, ES, FI, IT, LU, NL, PT, SE)	6 (BE, DE, DK, ES, FR, IT)
Number of TUs with no data on any level of CB	3 (IT (2) and PL)			
Member States in which none of the TUs in the sector are involved in any CB	2 (BG, LV)			

^(a) CB at the sector level = answer to the question ‘Is the TU involved in collective bargaining (CB) for the TAW in all sectors where TAW [workers] are on assignment?’; CB at the company level = answer to the question ‘Is the TU involved in collective bargaining at company level with any temporary work agency?’. See the country pages in Annex 2 for more details.

Notes: CB, collective bargaining; TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

Collective bargaining is not the only expression of trade unions’ activism and efforts in workers’ interests representation. Other forms include industrial action (including strikes, demonstrations and public campaigns) and can be either complementary or a proxy for missing or weak collective bargaining. In Italy, for instance, the three main trade unions (NIDIL CGIL, Uiltemp and FELSA CISL) organised a TAW strike on 21 December 2022 to protect TAW workers against job cuts in some essential services. Further examples include the strike by UILTuCS on 2 May 2022 regarding private surveillance and security services and the strikes by CGIL and CISL on 27 March 2023 concerning the

⁽³⁵⁾ This is, for example, the case for FESMC-UGT in Spain: the union federation is only involved in collective bargaining in private services (retail, hospitality, telecommunications, mass media, culture, sports, administrative offices, insurance activities, cleaning services, transport and security). Moreover, despite being a member of UNI Europa, it is not specifically a member of the organisation’s TAW Committee, as the national expert consulted for this study reported that the union is ‘not relevant’ to the TAW sector.

sale of a company hiring TAW workers. Similar strike actions were organised in Portugal, where Sindetelco called for a strike covering the entire TAW sector back in 2018. This was followed by similar calls for strikes by Sinttav in 2018, 2019, 2021 and 2023. In 2022, Sinttav complemented its strike activity with a constructive proposal for a single-employer agreement with Intelcia, a large company in the TAW sector.

In other Member States, such as France, trade unions' efforts were focused on the fight for equal rights for TAW and regular workers, including fighting against the pension reform adopted in 2023. The trade union CGT Intérim also reported numerous actions at the company level, including actions to defend temporary workers who had been penalised by their employer, to demand pay rises or to denounce discrimination. Similar efforts focused on ensuring equal rights were on the agenda of the Finnish union PAM, which collectively bargains for TAW workers in the services sector and ensures that they covered by the same general collective agreements as other workers in the sector. In Hungary, the union BDSZ is trying to promote a change of status for TAW workers, moving them to employee status, and control the fulfilment of the legal requirements applicable to TAW workers.

On top of campaigns in favour of TAW workers, there have been efforts to involve TAW workers in trade union actions. In the abovementioned case of pension reform, FEC FO reported that TAW workers were mobilised and took part in demonstrations at the local level, distributed leaflets, welcomed and shared information with new temporary workers and held information sessions in TWAs. In the Netherlands, during collective bargaining negotiations and employer congresses at specific hiring companies such as PostNL or Albert Heijn Distribution Centres, actions were organised targeting talks with parliament, particularly members of the Social Affairs and Employment Commission. These actions included a social media campaign aimed at the Minister of Social Affairs and Employment.

Overall, as these examples show, industrial action at the national level is difficult to organise and is not commonplace across the EU. A case in point is the Danish union DM ⁽³⁶⁾, which reported the following:

We want to negotiate collective agreements with the TAW industry, but the industry does not seem to be interested. We help members individually with employers and also, for example, in legal proceedings, representing many members in cases of mass redundancies and misclassification of pay and conditions. One problem is that many employers have joined employer organisations where they are covered by non-academic collective agreements to circumvent the user companies' pay and employment conditions. They then hire DM's members and send them to the user companies on non-academic collective agreements, even though in many cases they are doing academic work. This is currently the subject of litigation.

Industrial action also tends to occur in Member States where unions are relatively strong and already doing more than average for the workers. Meanwhile, in central and eastern European Member States, for example, such actions are much more scarce or even non-existent.

⁽³⁶⁾ Since the data collection for this study, DM has ceased its affiliation to UNI Europa Agency Workers.

There is some variation in the levels and depths of the involvement in UNI Europa Agency Workers structures among member trade unions (see Table 49). All affiliated trade unions are invited and have the right to attend meetings of the management bodies of the organisation, and it is up to the unions whether or not they attend. According to the data provided by national members, 11 member unions reported their involvement in the management bodies of UNI Europa Agency Workers, covering Belgium, Bulgaria, Denmark, Germany, Italy, Portugal, Spain and Sweden. However, 10 reported that they do not participate in the management bodies, and 11 unions did not provide data. Working groups in UNI Europa Agency Workers are thematic (e.g. focusing on young people) rather than sector specific. Seven member unions reported involvement in such working groups: ACV-CSC Food and Services (Belgium), HK Privat (Denmark), ver.di (Germany), FNV (Netherlands), Sinttav (Portugal), FESMC-UGT (Spain) and CCOO – Servicios (Spain). Overall, 9 member unions reported that they do not attend working groups, and no information was provided on the remaining 16. Actively participating unions are therefore predominantly from the older Member States (those that joined before the 2004 accession), which may point to variations in unions' capacities as well as strengths in the sector and, to some extent, also reflects challenges (in terms of, for example, membership, resources or the status of social dialogue) in the Member States less active in the UNI Europa Agency Workers management structures and working groups.

Several interesting cases need to be highlighted in this section. CITUB from Bulgaria, despite reporting zero TAW members at the national level, is active in the management bodies of UNI Europa Agency Workers. No information is available on two member organisations: Uiltemp in Italy and Solidarność in Poland.

There are several discrepancies between the national-level members and their European affiliations, as pointed out in the previous sections. In Italy, FELSA CISL is listed as a member of UNI Europa Agency Workers, but this was not confirmed by UNI Europa Agency Workers. Another two Italian unions, FIST CISL and Uiltemp, are listed as members of UNI Europa Agency Workers by UNI Europa Agency Workers, but this was not confirmed at the national level. In Poland, Solidarność is also listed as a UNI Europa Agency Workers member, but this was not confirmed by Solidarność. In Sweden, Sveriges Ingenjörer claims not to be affiliated in relation to TAW workers.

Full details for each member union are shown in Table 49. These data, or the lack thereof, are investigated further in the section on trade unions' effective participation in the ESSDC (Section 3.8).

Representativeness of the European social partner organisations: Temporary agency work sector

Table 49: Involvement of member unions in UNI Europa structures and affiliation to other European organisations

Member State	TU name	TU abbreviation	Directly affiliated to UNI Europa Agency Workers for its TAW workers	Involved in the management bodies of UNI Europa Agency Workers	Actively involved in the working groups for TAW on assignments of UNI Europa Agency Workers	Affiliated to UNI Europa Agency Workers for its directly employed TAW staff (not on assignment) of TWAs	Involved in the management bodies of UNI Europa Agency Workers for directly employed TWA staff	Pays fees to UNI Europa Agency Workers for its workers/ members who are directly employed by TWAs	Indirectly linked or affiliated to UNI Europa Agency Workers for its TAW workers	Affiliated to UNI Europa for its members in other sectors	Affiliated to any other European organisation for its TAW workers
AT	GPA	GPA	Yes	No	N.A.	Yes	No	Yes	No	Yes (no further information provided)	No
BE	Algemene Centrale der Liberale Vakbonden van België	ACLVB-CGSLB	Yes	No	No	No	No	No	No	No	No
BE	ACV-CSC Puls	ACV-CSC Puls	Yes	No data	No data	Yes	No data	No data	No data	Yes – sectors with a significant amount of white-collar work	No data
BE	ACV-CSC Food and Services	ACV-CSC Food and Services	Yes	Yes – Steering Committee Property Services	Yes – within property services	No	No	No	Directly	Yes – all related to the food and services sectors	No
BE	ABVV-FGTB Federation of White-collar Workers, Technicians and Professional and Managerial Staff	ABVV-FGTB BBTK-SETCA	Yes	No data	No data	Yes	Yes	Yes	Directly	Yes – all related to white-collar work	No data
BE	ABVV-FGTB General Federation	ABVV-FGTB ACCG	Yes	No data	No data	No	No	No	Directly	Yes	No data
BG	Confederation of Independent Trade Unions of Bulgaria	CITUB	Yes	Yes	No	Yes	Yes	Yes	No	Yes	No
DE	United Services Trade Union	ver.di	Yes	Yes	Yes	Yes	Yes	Yes	N.A.	Yes – care, security, commerce, finance, gaming, graphical and packaging, hair and beauty, ICT and related services, media, entertainment, post	No

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Directly affiliated to UNI Europa Agency Workers for its TAW workers	Involved in the management bodies of UNI Europa Agency Workers	Actively involved in the working groups for TAW on assignments of UNI Europa Agency Workers	Affiliated to UNI Europa Agency Workers for its directly employed TAW staff (not on assignment) of TWAs	Involved in the management bodies of UNI Europa Agency Workers for directly employed TWA staff	Pays fees to UNI Europa Agency Workers for its workers/ members who are directly employed by TWAs	Indirectly linked or affiliated to UNI Europa Agency Workers for its TAW workers	Affiliated to UNI Europa for its members in other sectors	Affiliated to any other European organisation for its TAW workers
										and logistics, agency workers, tourism	
DK	HK Privat	HK Privat	Yes	Yes	Yes	Yes – UNI-ICTS (also includes business services)	Yes	Yes	No	Yes – all business services, besides the information technology and telecommunications industries	No
ES	Mobility, Consumption and Services Federation of the General Union of Workers	FESMC-UGT	Yes	Yes	Yes	Yes	Yes	N.A. (no response)	N.A. (no response)	Yes – FESMC-UGT covers other sectors, for which it is also affiliated to UNI Europa (media, entertainment and arts, cleaning and security, post and logistics, commerce, hair and beauty, finance, tourism, ICT etc.)	No
ES	Services Federation – Workers' Commissions	CCOO – Servicios	Yes	Yes	Yes	Yes	Yes	Yes	No – directly affiliated to UNI Europa	Yes – financial, insurance, retail, ICT and gambling sectors	No
FI	Service Union United	PAM	Yes	No	No	Yes	No	Yes – but payments are for all members, not only TAW workers	No	Yes – the affiliation is for all members in the services sectors	No

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Directly affiliated to UNI Europa Agency Workers for its TAW workers	Involved in the management bodies of UNI Europa Agency Workers	Actively involved in the working groups for TAW on assignments of UNI Europa Agency Workers	Affiliated to UNI Europa Agency Workers for its directly employed TAW staff (not on assignment) of TWAs	Involved in the management bodies of UNI Europa Agency Workers for directly employed TWA staff	Pays fees to UNI Europa Agency Workers for its workers/ members who are directly employed by TWAs	Indirectly linked or affiliated to UNI Europa Agency Workers for its TAW workers	Affiliated to UNI Europa for its members in other sectors	Affiliated to any other European organisation for its TAW workers
FR	General Confederation of Labour – Interim	CGT Intérim	Yes	No	No	Yes	No	Yes	No	No	No
FR	French Democratic Labour Confederation – Services Federation	FS-CFDT	Yes	No	No	Yes	No	Yes	No	Yes – retail, cleaning, private security	No
FR	French Confederation of Christian Workers – CSFV	CFTC – CSFV	Yes	No data	No data	Yes	No answer	No answer	No answer	Yes	No
FR	Employees and Managers’ Federation – General Confederation of Labour – Force Ouvrière (CGT-FO)	FEC FO	Yes	No	No	Yes	No	No	No	No	No
IT	New Identities of Work in the Italian General Confederation of Labour	NIDIL CGIL	Yes	Yes	No data	No data	No data	No data	No	No data	No data
IT	Italian Federation of Commerce, Tourism and Services Workers in the Italian General Confederation of Labour	FILCAMS CGIL	Yes	Yes	N.A.	Yes	Yes	Yes	No data	No data	No data
IT	Federation of Self-employed and Atypical Workers in the Italian Confederation of Workers’ Unions	FELSA CISL	Yes	Yes	No data	No data	N.A.	N.A.	No data	No data	No data

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Directly affiliated to UNI Europa Agency Workers for its TAW workers	Involved in the management bodies of UNI Europa Agency Workers	Actively involved in the working groups for TAW on assignments of UNI Europa Agency Workers	Affiliated to UNI Europa Agency Workers for its directly employed TAW staff (not on assignment) of TWAs	Involved in the management bodies of UNI Europa Agency Workers for directly employed TWA staff	Pays fees to UNI Europa Agency Workers for its workers/members who are directly employed by TWAs	Indirectly linked or affiliated to UNI Europa Agency Workers for its TAW workers	Affiliated to UNI Europa for its members in other sectors	Affiliated to any other European organisation for its TAW workers
IT	Italian Confederation of Tertiary Trade Unions in the Italian Confederation of Workers' Unions	FIST CISL	Yes	No data	No data	Yes	Yes	Yes	No data	No data	No data
IT	Temporary Autonomous Atypical Workers in the Italian Union of Labour	Uiltemp	Yes	No data	No data	No data	No data	No data	No data	No data	No data
IT	Italian Union of Tourism Trade Workers	UILTuCS	Yes	No data	No data	Yes	Yes	Yes	No data	No data	No data
LU	Luxembourg Confederation of Independent Trade Unions (Services and Energy)	OGB-L	Yes	No	No	Yes	No	Yes	No	Yes – services sector in general	No
LV	Trade Union of Culture Sector of Latvia	LKDAF	Yes	No	No	No	No	No	No	Yes – graphical (UNI-MEI)	No
NL	Federation of Dutch Trade Unions	FNV	Yes	No	Yes – EU Social Dialogue on TAW	Yes	No	N.A.	N.A.	Yes – FNV Services, of which FNV Flex is part; FNV Trade covers other subsectors, like finance, cleaning, gambling;	ETUC
PL	Solidarity (Solidarność)	Solidarność	Yes	No data	No data	No data	No data	No data	No data	No data	No data
PT	Democratic Union of Postal, Telecommunications,	Sindetelco	Yes	No data	No data	Yes	No data	No data	No data	Yes – postal services, logistics, telecommunications,	No

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Directly affiliated to UNI Europa Agency Workers for its TAW workers	Involved in the management bodies of UNI Europa Agency Workers	Actively involved in the working groups for TAW on assignments of UNI Europa Agency Workers	Affiliated to UNI Europa Agency Workers for its directly employed TAW staff (not on assignment) of TWAs	Involved in the management bodies of UNI Europa Agency Workers for directly employed TWA staff	Pays fees to UNI Europa Agency Workers for its workers/ members who are directly employed by TWAs	Indirectly linked or affiliated to UNI Europa Agency Workers for its TAW workers	Affiliated to UNI Europa for its members in other sectors	Affiliated to any other European organisation for its TAW workers
	Media and Services Workers									media, call centres and private security	
PT	National Trade Union of Telecommunications and Audiovisual Workers	Sinttav	Yes	Yes	Yes	Yes	No data	No data	No data	Yes – telecommunications, audiovisual, Anacom (the regulator for communications), RTP (public TV), INCM (the national mint), CTT (national postal services provider), etc.	No
PT	Trade Union of Service Sector Workers	SITESE	Yes	N.A.	N.A.	Apparently not	N.A.	N.A.	Apparently not	N.A.	No
SE	Unionen	Unionen	Yes	No (for TAW)	No	Yes	No (for TAW)	Yes	Directly	Yes – commerce, ICTS, media and entertainment, graphical and packaging, tourism and gaming	No
SE	Swedish Union for Service and Communications Employees	SEKO	Yes	Yes	No data	No	N.A.	N.A.	Directly	Yes – primarily postal and courier services, for which Jens Saverstam is the current president	No
SE	Sveriges Ingenjörer	Sveriges Ingenjörer	Yes	No data	No data	No	No data	No data	No data	Yes – ICT and related services, professionals and managers	No

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Directly affiliated to UNI Europa Agency Workers for its TAW workers	Involved in the management bodies of UNI Europa Agency Workers	Actively involved in the working groups for TAW on assignments of UNI Europa Agency Workers	Affiliated to UNI Europa Agency Workers for its directly employed TAW staff (not on assignment) of TWAs	Involved in the management bodies of UNI Europa Agency Workers for directly employed TWA staff	Pays fees to UNI Europa Agency Workers for its workers/ members who are directly employed by TWAs	Indirectly linked or affiliated to UNI Europa Agency Workers for its TAW workers	Affiliated to UNI Europa for its members in other sectors	Affiliated to any other European organisation for its TAW workers
Totals		Total number of 'yes' responses	32	11	7	21	9	14	0	21	1
		Total number with no data	0	11	16	4	11	13	14	8	10
		Total number of 'no' responses	0	10	9	7	12	5	18	3	21

Notes: ETUC, European Trade Union Confederation; TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

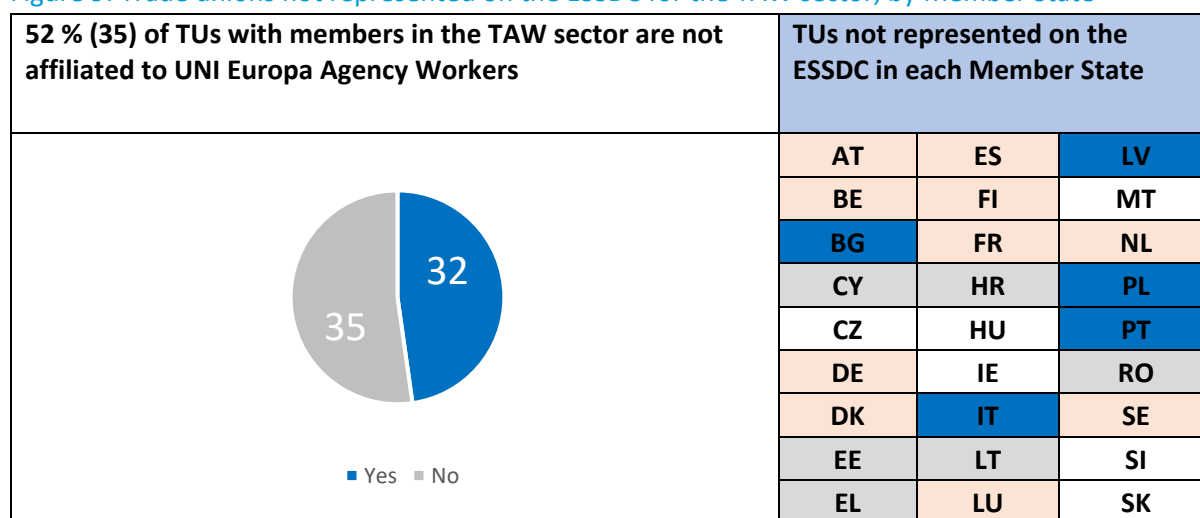
3.2. Trade unions not represented on the European sectoral social dialogue committee (sectoral trade unions not affiliated to UNI Europa Agency Workers)

This section takes a closer look at those trade unions that are not affiliated to UNI Europa Agency Workers and hence are not represented on the ESSDC for TAW. It provides an overview of the limits of and potential for the membership level of this European trade union federation.

Out of the total of 67 trade unions organising workers in the TAW sector across the EU, 35 (or 52 %) are not affiliated to UNI Europa Agency Workers and hence are not represented on the ESSDC for TAW. The term ‘non-represented trade unions’ will be used for these national trade unions in this section (see Figure 9).

These 35 non-represented unions come from 16 Member States ⁽³⁷⁾, grouped into two categories. The first group consists of six Member States where all trade unions are not affiliated to UNI Europa Agency Workers. These are Czechia, Hungary, Ireland, Malta, Slovakia and Slovenia, meaning that non-represented unions can therefore be found in some Member States that joined the EU in 2004. The second group consists of 10 Member States that have multiple trade unions representing workers in the sector, of which only some are members of UNI Europa Agency Workers. These Member States are Austria, Belgium, Denmark, Finland, France, Germany, Luxembourg, the Netherlands, Spain and Sweden.

Figure 9: Trade unions not represented on the ESSDC for the TAW sector, by Member State



Notes: TU, trade union. Blue shading in cells is used for Member States in which all TUs in the sector are represented on the ESSDC; orange shading in cells indicates that only some TUs are represented on the ESSDC; cells with grey shading indicate Member States with no existing TUs; cells with no shading indicate Member States not represented on the ESSDC. Note that, in Poland, Solidarność is also listed as a member of UNI Europa Agency Workers, but this was not confirmed by Solidarność.

Source: Network of Eurofound Correspondents, 2023.

⁽³⁷⁾ UNI Europa Agency Workers has affiliates in 15 Member States.

The six Member States where there are no trade unions organising or representing TAW workers are Croatia, Cyprus, Estonia, Greece, Lithuania and Romania. In this group, the national experts indicated that there were no trade unions dedicated to or focusing on TAW as their main constituency. This does not mean, however, that TAW workers cannot become members of general unions at the federation or sectoral level; this right is reported as fully secured in Romania, at least.

It should also be mentioned that some unions active in the TAW sector are affiliated to UNI Europa but are not affiliated to its TAW sectoral committee (e.g. Teollisuusliitto in Finland, GWU in Malta or CNV in the Netherlands). These cases are summarised in Table 58.

The sector-relatedness of the non-represented trade unions is slightly different from that of the national unions that are members of UNI Europa Agency Workers (see Table 50). Most non-represented unions organise TAW workers in the manufacturing (sub)sector (21 unions or 60 %). The (sub)sector where the smallest number of these unions organise TAW workers is the audiovisual (sub)sector (6 unions or 17 %).

Table 50: Overview of the sector-relatedness of trade unions not represented on the ESSDC

	Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	Other sectors
All TUs	67														
TUs not affiliated ^(a) to UNI Europa Agency Workers out of the 67 TUs	35 (52 %)														
TUs not affiliated to UNI Europa Agency Workers and covering the sector	10	13	11	8	8	11	11	10	10	8	13	21	6	8	11
Out of the 35 TUs not affiliated to UNI Europa Agency Workers (%)	29	37	31	23	23	31	31	29	29	23	37	60	17	23	31
Out of all 67 TUs (%)	15	19	16	12	12	16	16	15	15	12	19	31	9	12	16

^(a) Including unions with no data on / no confirmation of non-membership at the national level. Note that all 35 unions were not listed as members of UNI Europa Agency Workers by UNI Europa Agency Workers.

Note: TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

Equal numbers of trade unions represent TAW workers with short-term contracts and the internal staff of TWAs (both 18). In 29 % of non-represented unions (or 15 % of all unions), TAW workers must join another trade union when they receive a direct permanent contract from the hiring firm. However, many responses were conditional, suggesting that the real percentage may be higher (see Table 51).

Table 51: Categories of workers (type of contract) represented by trade unions not represented on the ESSDC

	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to affiliate to another TU (number of 'yes' responses)
Number of TUs	18	18	10 (many conditional replies, so more unions could be counted here)
Out of the 35 non-represented TUs (%)	51	51	29
Out of all 67 TUs (%)	27	27	15
Number of Member States	6 (AT, BE, DK, FI, FR, SE)	7 (AT, BE, DE, FI, FR, HU, SE)	4 (AT, BE, DE, SI)

Notes: TU, trade union. Answers 'yes' include those where membership was indicated as 'theoretically possible' and those that organise all types of workers irrespective of the type of contract.

Source: Network of Eurofound Correspondents, 2023.

The membership domain of unions not represented on the ESSDC is similar to that of the unions represented on the ESSDC and increases with the size of the company employing the organised workers. The majority of unions organise employees in companies of all sizes. More than 80 % of non-represented unions organise workers in large TWAs with more than 250 TAW workers on assignment (29 out of 35). The same number of unions (29) organise workers across the entire Member State, and 22 unions also have regional structures (see Table 52).

Table 52: Number of unions not represented on the ESSDC, by company size group and geographical coverage

	Size of the companies employing organised workers (TAW on assignment)				Geographical coverage	
	1–9	10–49	50–249	> 250	Organising entire Member State (number of ‘yes’ responses)	Regional subdivisions (number of ‘yes’ responses)
Number of TUs	20	23	26	29	29	22
Out of the 35 non-represented TUs (%)	57	66	74	83	83	63
Out of all 67 TUs (%)	30	34	39	43	43	33
Number of Member States	8 (AT, BE, DE, DK, FI, FR, LU, SE)	11 (AT, BE, DE, DK, FI, FR, LU, MT, NL, SE, SK)	12 (AT, BE, DE, DK, FI, FR, HU, LU, MT, NL, SE, SK)	13 (AT, BE, CZ, DE, DK, FI, FR, HU, LU, MT, NL, SE, SK)	14 (AT, BE, DE, DK, FI, FR, HU, IE, LU, MT, NL, SE, SI, SK)	9 (AT, BE, CZ, DE, DK, FI, HU, SE, SK)

Notes: TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

Non-represented unions reported increasing membership as the most common trend (10 of 35 unions). Some unions reported stable (nine) or fluctuating (one) membership, and two unions reported a decrease in their membership numbers. However, 13 unions did not provide any data on their membership trends.

Overall, 10 trade unions from 10 Member States reported that they are the largest unions organising TAW workers in their sector. Since they are not members of UNI Europa Agency Workers, this means that the largest unions representing TAW workers from Austria, Czechia, Denmark, Germany, Hungary, Malta, Slovakia, Slovenia, Spain and (for blue-collar workers and doctors) Sweden are not represented on the ESSDC for TAW (see Table 53). For comparison, UNI Europa Agency Workers organises the largest trade unions in Finland, France, the Netherlands, Portugal and Sweden. Of the 35 non-represented unions, 14 did not provide any data or provided only qualitative assessments of their membership. In some cases, it is difficult to determine the union’s position within the national industrial relations system due to various characteristics of TAW as a sector. This is, for instance, the case in Belgium: in practice, all ABVV-FGTB federations act as a single entity regarding TAW workers, and so do all ACV-CSC federations, in order to reduce complexity and increase accessibility. It is therefore not appropriate to compare the sizes of the federations within these confederations.

Table 53: Membership trend and ranking of trade unions not represented on the ESSDC

	Total number of non-represented TUs	Trend	Ranking in the national TAW sector
Number of TUs	35	Increasing: 10 Stable: 9 Fluctuating: 1 Decreasing: 2 No data: 13	Largest: 10 (AT, CZ, DE, DK, ES, HU, MT, SE ^(a) , SI, SK) Second largest: 7 (CZ, FI, HU, LU, MT, NL, SE) Third largest: 3 (CZ, DE, FR) No data or only a qualitative estimate: 14 (BE, DK, FI, FR, IE, NL, SE)

^(a) In Sweden, LO is the largest among blue-collar workers and Sveriges Läkareförbund is the largest for doctors.

Note: TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

Table 54 presents the membership strengths and density rates of the national unions not represented on the ESSDC. For 14 trade unions (40 % of non-represented unions), data on their membership are not available, which is somewhat better than the availability of data on the membership of affiliates of UNI Europa Agency Workers (53 % of members did not provide any data). Bearing these data issues in mind, non-represented trade unions cover at least 200 181 TAW workers, which equates to 80 % of the 248 296 workers covered by all identified trade unions in TAW, remembering that 49 % of all unions did not provide any data on their membership (see Table 54).

Based on this information, the TUD of all non-represented members is at least 3 %, while remembering that 40 % of the non-represented unions did not report any membership data. In other words, based on the available data, 3 % of the total number of TAW workers employed in the EU are union members who are not represented on the ESSDC and are not members of UNI Europa Agency Workers.

To put this in perspective, using different estimates of total employment (see comparison IV in Table 6), the TUD of non-represented unions is 4.7 % when overall EU employment is taken as 4 290 110 (EU-27, EU-LFS official) and 5.7 % when overall EU employment is taken as 3 522 789 (based on data from the SBS for NACE 78.2).

As is the case for the member unions of UNI Europa Agency Workers, based on the numbers above, no reliable estimates can be calculated of the share of TAW workers who are members of unions and are not represented on the ESSDC. The available data point to a TUD rate that starts somewhere between 3 % and 5.7 %, and this may be higher, given the missing data.

Table 54: Membership strength of national unions not represented on the ESSDC – full details

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership	TUD (%) (national employment)	EU TUD (%) (EU employment)
AT	Production Trade Union	PRO-GE	10 000	Stable	Largest	12.9	0.15
BE	ABVV-FGTB Metaal	ABVV-FGTB Metaal	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	N.A.	N.A.
BE	ACV-CSC National Federation of White-collar workers	ACV-CSC CNE	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	N.A.	N.A.
BE	ACV-CSC METEA	ACV-CSC METEA	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	N.A.	N.A.
BE	ACV-CSC Transcom	ACV-CSC Transcom	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	N.A.	N.A.
BE	ACV-CSC Construction, Industry and Energy	ACV-CSC BIE	5 732	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	0.8	0.09
BE	ABVV-FGTB Horval	ABVV-FGTB Horval	No data	No data	ACV-CSC and ABVV-FGTB are relatively similar	N.A.	N.A.

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership	TUD (%) (national employment)	EU TUD (%) (EU employment)
					in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)		
BE	ABVV-FGTB Belgian Federation for Blue-collar Transport Workers	ABVV-FGTB BTB	53 000	No data	ACV-CSC and ABVV-FGTB are relatively similar in size (both being significantly larger than the third and smallest confederation, ACLVB-CGSLB)	7.6	0.81
CZ	KOVO Mladá Boleslav	KOVO MB	1 700	Stable	Largest	0.6	0.03
CZ	KOVO Kvasiny	KOVO KV	855	Stable	Second largest	0.3	0.01
CZ	KOVO Vrchlabí	KOVO VL	170	Stable	Third largest	0.1	0.002
DE	Industrial Union of Metalworkers	IG Metall	40 000	Fluctuating	Largest	4.9	0.61
DE	Industrial Union Mining, Chemistry, Energy	IG BCE	2 500	Increasing	Third largest	0.3	0.04
DK	United Federation of Danish Workers	3F	1 300	Stable	Largest	3.6	0.02
DK	Danish Association of Masters and PhDs	DM	N.A.	Increasing	N.A. (not among the three largest)	N.A.	N.A.
ES	Unión y Empleo	Unión y Empleo	N.A.	N.A.	Largest	N.A.	N.A.
FI	Union of Private Sector Professionals	ERTO	214	No data	No data	0.3	0.003
FI	Industrial Union	Teollisuusliitto	3 130	Increasing	Second or third largest	5.0	0.05
FR	French Managers' Confederation – French General Managers' Confederation – Retail and Services – Syndicat National de l'Encadrement et des Services	CFE-CGC SNES	10–20	Stable	Third largest	0.001	0.0002
FR	National Union of Autonomous Trade Unions – Trade and Services Federation	UNSA FCS	N.A.	Increasing	Appears to be the smallest in the sector	N.A.	N.A.

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	TU name	TU abbreviation	Number of members (estimates)	Membership trend over the 2–3 years prior to the study	Ranking in the sector in terms of membership	TUD (%) (national employment)	EU TUD (%) (EU employment)
HU	Federation of Hungarian Metalworkers	VASAS	1 500–1 600	Increasing	Largest	0.7	0.02
HU	Trade Union of Mine, Energy and Industrial Workers	BDSZ	90–100	Increasing	Second largest	0.04	0.001
IE	Services Industrial Professional and Technical Union	SIPTU	N.A.	N.A.	N.A.	N.A.	N.A.
LU	Luxembourg Confederation of Christian Trade Unions (Services)	LCGB Services	Not possible to provide a number	Increasing	Second largest	N.A.	N.A.
MT	General Workers Union	GWU	6 000	Increasing	Largest	65.9	0.09
MT	Voice of the Workers	UHM	1 300	Increasing	Second largest	14.3	0.02
NL	Christian National trade Union Federation	CNV	Not disclosed	Not disclosed	Second largest	N.A.	N.A.
NL	The Union	De Unie	N.A.	N.A.	N.A.	N.A.	N.A.
SE	Swedish Trade Union Confederation	LO	67 000	Decreasing	Largest among blue-collar workers	78.6	1.02
SE	Professional Associations in Trade and Services	AHT	4 500	Stable	Second largest	5.3	0.07
SE	Swedish Association of Health Professionals	Vårdförbundet	1 000	Increasing	Not among the largest	1.2	0.02
SE	Swedish Teachers' Union	Sveriges Lärare	30	Stable	N.A.	0.04	0.0004
SE	Sveriges Läkarförbund	Sveriges Läkarförbund	N.A.	No data	Largest, but only among doctors	N.A.	N.A.
SI	Free Trade Union of Slovenia	SSS	150	Decreasing	Largest / the only one	0.8	0.002
SK	Trade Union Federation KOVO	OZ KOVO	N.A. (negligible number)	Stable	Largest / the only one	N.A.	N.A.
Total			200 181				
Total EU-27 employment			6 543 095				3.06

Notes: TU, trade union. For the data on national and EU employment used in the calculations, see 8. The total number of EU TAW workers (employment in TAW) used for these calculations is based on the national data provided by the Network of Eurofound Correspondents = **6 543 095**.

Sources: Network of Eurofound Correspondents, 2023; data on TUD, own calculations.

Table 55 summarises the roles and positions of non-represented national unions in the industrial relations landscape. Out of the 35 unions, 24 (69 %) are recognised as representative for TAW at the national level. Note that unions categorised as 'not representative' here are often representative for other sectors – for example, OZ KOVO is representative for the metal sector in Slovakia. In Slovenia,

the SSS is not considered representative on its own but is a member of ZSSS (the Association of Free Trade Unions of Slovenia), which is a recognised representative trade union association at the national level. In many Member States, such as Malta, representativeness is not applicable, as TAW is not recognised as a sector in its own right. It is thus clear that a certain level of caution needs to be applied when looking at these numbers, as they reflect a traditional classification of representative social partners that is applicable only when TAW is seen as a sector rather than a form of employment (see Box 2: Provisions on the representation of TAW workers in the Directive on TAW).

Regarding involvement in social dialogue, 13 trade unions are involved in bipartite or tripartite social dialogue bodies. The majority of unions (18) are also consulted by the government on issues related to TAW workers, with 11 of them being consulted regularly and 6 on an ad hoc basis. The vast majority of unions are also affiliated to the national confederation (24 out of 35 or 69 %) (see Table 55).

Table 55: Overview of non-represented trade unions' involvement in industrial relations

	Total number	TUs recognised as representative based on national recognition	Involved in bipartite/tripartite social dialogue bodies	Consulted by government	Affiliated to a national confederation
Number of TUs	35	24	13	18	24
				Regularly: 11 (61 %) ^(a)	
				Ad hoc: 6 (33 %)	No data / not applicable: 10
% of non-represented TUs	100	68.57	37.14	51.43	68.57
Number of Member States	16 (AT, BE, CZ, DE, DK, ES, FI, FR, HU, IE, LU, MT, NL, SE, SI, SK)	9 (AT, BE, DE, DK, FI, FR, LU, NL, SE)	6 (AT, BE, DK, FI, FR, LU)	7 (AT, BE, DE, FI, FR, MT, SE)	11 (AT, BE, DE, DK, FI, FR, HU, LU, SE, SI, SK)

^(a) For one trade union, this is not specified.

Note: TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

The majority (20 out of 35) of the trade unions not represented on the ESSDC are involved in some form of collective bargaining for their TAW workers. Sector-level bargaining is dominant, with 43 % of unions involved in this form (or 15 trade unions). Only six trade unions (17 %) bargain at the company level, and these unions are from France, Germany and Malta (see Table 56). In three Member States – Hungary, Slovakia and Slovenia – trade unions are not involved in collective bargaining for TAW

workers at all. For a detailed overview of the country-level information on collective bargaining, see the country pages in Annex 2.

Table 56: Involvement of non-represented unions involvement in collective bargaining

	Total number of TUs	Number of TUs involved in any CB	CB level ^(a)	
			Sector	Company
Number of TUs	35	20	15	6
% of non-represented TUs	100.00	57.14	42.86	17.14
Number of Member States	16 (AT, BE, CZ, DE, DK, ES, FI, FR, HU, IE, LU, MT, NL, SE, SI, SK)	10 (AT, BE, DE, DK, FI, FR, LU, MT, NL, SE)	8 (AT, BE, DE, DK, FI, LU, NL, SE)	3 (DE, FR, MT)
Number of TUs with no data on any level of CB	6 (CZ (3), ES (1), NL (1), IE (1))			
Number of Member States in which none of the TUs in the sector are involved in any CB	3 (HU, SI, SK)			

^(a) CB at the sector level = answer to the question 'Is the TU involved in collective bargaining (CB) for the TAW in all sectors where TAW [workers] are on assignment?'; CB at the company level = answer to the question 'Is the TU involved in collective bargaining at company level with any temporary work agency?'. See the country pages in Annex 2 for more details.

Notes: CB, collective bargaining; TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

3.3. Other European trade union organisations to which some sectoral national trade unions are affiliated

This study did not identify significant involvement of national trade unions in other European trade union organisations that represent TAW workers. In total, there are only seven trade unions active in the TAW sector – from Austria, Belgium, France, Germany, the Netherlands and Sweden – that are members of other European organisations (see Table 57).

This finding differs from that in the previous representativeness study, which identified several other organisations alongside UNI Europa Agency Workers. The change can be attributed to the improved methodology of this representativeness study. While the 2016 report asked respondents to report all European-level organisations to which the particular organisation was affiliated ⁽³⁸⁾, this representativeness study reports **only those European organisations that represent the member**

⁽³⁸⁾ Question in 2016: 'Is the TU affiliated to any other European association for its TAW members? If yes, to which ones?'

unions for TAW workers ⁽³⁹⁾. In other words, since many national trade unions are not specific to TAW, instead being general/sectoral unions that also represent TAW workers, they are affiliated to different sectoral organisations, such as the metalworkers' trade unions affiliated to IndustriAll. However, these sectoral organisations usually represent all workers regardless of the form of employment and are the subjects of the representativeness assessments for various ESSDCs.

Table 57 shows that only one trade union – FNV (Netherlands) – is simultaneously affiliated to UNI Europa Agency Workers and another organisation (the European Trade Union Confederation (ETUC)). The other cases of involvement most frequently involve membership of IndustriAll (3), but there are also instances of membership of the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT) (1), the European Transport Workers' Federation (ETF) (1), ETUC (1), the European Federation of Public Service Unions (EPSU) (1), the European Midwives Association (EMA) (1), the European Association for Professions in Biomedical Science (EPBS) (1) and the European Federation of Radiographer Societies (1). The majority of the national trade unions are also involved in the organisations' management or decision-making bodies, and most pay affiliation fees. The Austrian trade union PRO-GE is also involved in the working groups of IndustriAll and EFFAT (on company policies, collective bargaining, young people and women).

It is worth noting that there is no fragmentation or organisational competition among these European-level organisations, as they are all trade union federations. The reported national trade unions' parallel affiliations are a consequence of the unions representing workers from more than one (sub)sector, of which some are coordinated by UNI Europa Agency Workers and others by IndustriAll or the ETF. The case of a reported affiliation to ETUC does not affect the harmony of union representation either; quite the contrary, as all European trade union federations are affiliated to ETUC. In one case, the parallel affiliation is a result of a 'personal union' between the national union IG BCE and IndustriAll: IG BCE's President, Michael Vassiliadis, is also the President of IndustriAll Europe. In one case (CFE-CGC SNES), the parallel affiliation is to CEC European Managers ⁽⁴⁰⁾, which is a representation of managers that is not part of ETUC, but with which ETUC has a partnership agreement.

Membership of other European trade union organisations enhances TAW workers' interest representation and increases representativeness by ensuring that their needs are taken into account not only on the basis of the form of their employment (TAW), but also in the context of the sector in which they are working.

⁽³⁹⁾ Questions in 2023: 'Is the TU affiliated to UNI Europa for temporary agency workers?' and 'Is the TU affiliated to any other European association for its TAW members? If yes, to which ones?'

⁽⁴⁰⁾ CEC European Managers represents around 1 million managers in Europe through its national and sectoral federations. At the European level, CEC European Managers is one of the six cross-industry EU social partner organisations recognised by the European Commission.

Table 57: Other European associations with some national sectoral trade unions affiliated

Member State	TU name	TU abbreviation	Affiliated to UNI Europa Agency Workers for its TAW workers	Affiliated to any other European association for its TAW members	Involved in the management/ decision-making bodies of the European organisation	Pays fees to the European organisation for its workers/ members in the TAW sector	Actively involved in the TAW sector activities or working groups of the European organisation
AT	Production Trade Union	PRO-GE	No	IndustriAll Europe, EFFAT	Yes	Yes	Yes (company policies, collective bargaining, young people and women)
BE	ABVV-FGTB Belgian Federation for Blue-collar Transport Workers	ABVV-FGTB BTB	No	ETF	Yes	Yes	Yes
DE	Industrial Union of Metalworkers	IG Metall	No	IndustriAll	Yes	Yes	No
DE	Industrial Union Mining, Chemistry, Energy	IG BCE	No	IndustriAll	Yes – IG BCE's President, Michael Vassiliadis, is also the President of IndustriAll Europe	Yes	N.A.
FR	French Managers' Confederation – French General Managers' Confederation – Retail and Services – Syndicat National de l'Encadrement et des Services	CFE-CGC SNES	No	No (but indirectly a member of CEC European Managers through the confederation CFE-CGC)	Not relevant	Not relevant	Not relevant
NL	Federation of Dutch Trade Unions	FNV	Yes	ETUC	At the FNV level	Yes	N.A.
SE	Swedish Association of Health Professionals	Vårdförbundet	No	EPSU, EMA, EPBS, European Federation of Radiographer Societies	Yes	Yes	Yes – examples from EPSU: health, social affairs, local and regional administration and gender equality

Note: TU, trade union.

Source: Network of Eurofound Correspondents, 2023.

However, this report identifies several national trade unions that are organising and representing TAW workers and are affiliated to UNI Europa, but **not its sectoral structure for agency workers (UNI Europa Agency Workers)**. Table 58 presents information on nine national trade unions – from seven Member States (Belgium, Finland, Latvia, Luxembourg, Malta, the Netherlands and Sweden) – that are not affiliated to UNI Europa Agency Workers but are affiliated to UNI Europa for other sectors. Since these organisations are identified as representing TAW workers, and are already incorporated into UNI Europa's structures, it can be suggested that they are also involved in the section for agency workers. In this way, UNI Europa Agency Workers could increase their membership density rate and represent more workers.

Table 58: National trade unions reporting TAW workers who are members of UNI Europa but not for the TAW sector

Member State	TU name	TU abbreviation	Affiliated to UNI Europa Agency Workers	Affiliated to UNI Europa for other sectors ^(a)
BE	ABVV-FGTB Metaal	ABVV-FGTB Metaal	No data	Yes – metal and textiles
BE	ACV-CSC METEA	ACV-CSC METEA	No data	Yes – metal and textiles
BE	ACV-CSC Transcom	ACV-CSC Transcom	No data	Yes – media, entertainment and artistic sectors
FI	Industrial Union	Teollisuusliitto	No	Yes – for the graphical sector; no data on other sectors
LU	Luxembourg Confederation of Christian Trade Unions (Services)	LCGB Services	No	Member of UNI Europa, but not for TAW
LV	Trade Union of Culture Sector of Latvia	LKDAF	No	Yes – graphical (UNI MEI)
MT	General Workers Union	GWU	No	Yes – each section is affiliated to the related sectoral structure, including UNI Europa Property Services and UNI Care
NL	Christian National Trade Union Federation	CNV	No	Member of UNI Europa, but not for TAW
SE	Swedish Trade Union Confederation	LO	No	Member of UNI Europa, but not for TAW

^(a) The question asked was ‘Is the trade union affiliated to UNI Europa for its members in other sectors? If yes which ones?’

Notes: TU, trade union. Only TUs that are not members of UNI Europa Agency Workers but are, at the same time, members of UNI Europa are presented in this table. TUs with no information available / no data on the affiliation to UNI Europa for TAW are excluded.

Source: Network of Eurofound Correspondents, 2023.

3.4. Representativeness of WEC-Europe

WEC-Europe is:

the voice of the recruitment and employment industry at European level. It brings together national federations and corporations covering a wide range of HR [human resources] services, including agency work, direct recruitment, career management, Recruitment Process Outsourcing (RPO) and Managed Service Provision (MSP).

WEC-Europe is part of the World Employment Confederation.

(WEC-Europe, undated-b)

WEC-Europe affiliates two types of members: first are the national federations / employer organisations from individual countries and second are the corporate members. WEC-Europe corporate members are members at the group/holding level, which covers operations in WEC-Europe member countries. There are two types of corporate members: global and regional. All global corporate members are also part of WEC-Europe. As of 2024, WEC-Europe's global corporate members included the Adecco Group, Engma, Gi Group Holding, ManpowerGroup, Randstad and RGF Staffing.

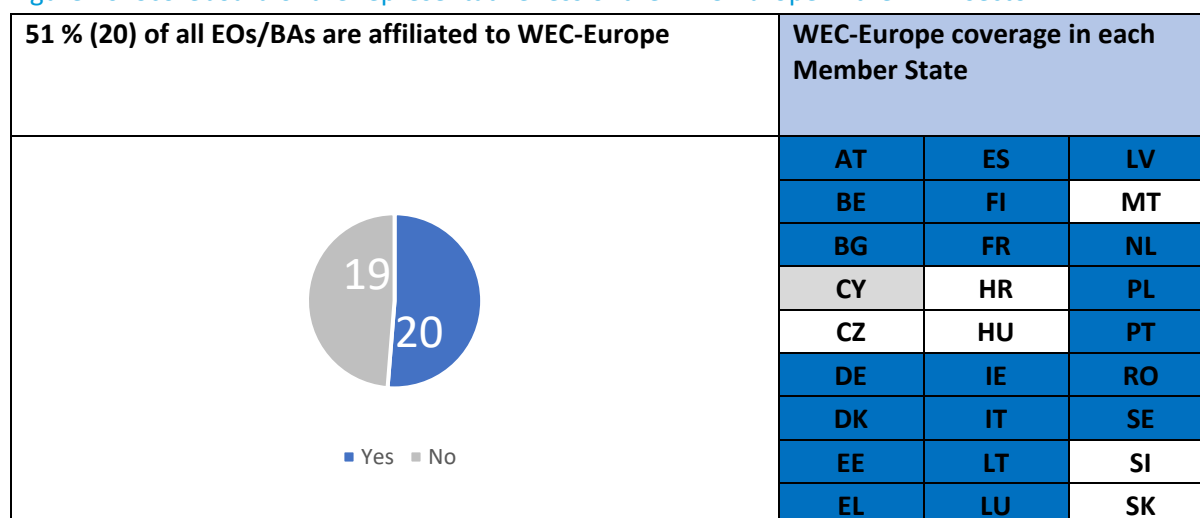
The analysis of large companies as actors in the industrial relations system was presented in Section 2.3. This section analyses the first type of membership – national employer organisations in WEC-Europe's structures – based on the data on various aspects of representativeness collected by the Network of Eurofound Correspondents for this study.

WEC-Europe has 20 affiliated national employer organisations and business associations active in the TAW sector in 20 Member States ⁽⁴¹⁾. This represents 51 % of all identified employer organisations / business associations in the TAW sector. All of the affiliates cover their entire Member States and are national-level organisations. In Croatia, Czechia ⁽⁴²⁾, Hungary, Malta, Slovakia and Slovenia (all acceding to the EU in 2004), the existing employer organisations / business associations are not members of WEC-Europe. In Cyprus, there is no employer organisation / business association in the sector (see Figure 10).

⁽⁴¹⁾ Four additional member organisations from non-EU countries (Norway, Switzerland, Turkey and the United Kingdom) are not reported in this study.

⁽⁴²⁾ APPS joined WEC-Europe after the information collection for this representativeness study was completed and is therefore not counted as a member of WEC-Europe for the purposes of this study.

Figure 10: Scoreboard of the representativeness of the WEC-Europe in the TAW sector



Notes: BA, business association; EO, employer organisation. Blue shading indicates Member States in which WEC-Europe has a member organisation; cells with grey shading indicate Member States with no EO/BA; cells with no shading indicate Member States not represented on the ESSDC.

Source: Network of Eurofound Correspondents, 2023.

Most employer organisations / business associations affiliated to WEC-Europe do not organise members that have activities in other sectors (65 % or 13 organisations). Seven employer organisations / business associations from seven Member States (Belgium, Denmark, Finland, Italy, Lithuania, Poland and Sweden) organise members that have activities in other sectors. As was the case among all identified employer organisations / business associations, most of the 'other' sectors/activities include those under NACE code 78 – Temporary employment agency activities (see Table 59). The detailed description of these activities for each Member State can be found in Annex 2.

Table 59: Sector-relatedness of employer organisations / business associations affiliated to WEC-Europe representing the employers in TAW / TWAs

	EO/BA represents enterprises from other sectors	
	Yes	No
Total number of EOs/BAs	7	13
% of all EOs/BAs affiliated to WEC-Europe (20)	35	65
% of all EOs/BAs (39)	18	33
Number of Member States with an EO/BA	7 (BE, DK, FI, IT, LT, PT, SE)	13 (AT, BG, DE, EE, EL, ES, FR, IE, LU, LV, NL, PL, RO)

Note: BA, business association; EO, employer organisation.

Source: Network of Eurofound Correspondents, 2023.

Another aspect of the sector-relatedness of the employer organisations / business associations is the subsectors of the economy to which TWAs and companies affiliated to the employer organisations / business associations provide TAW workers. The number of affiliates supplying workers to sectors ranges from 10 (50 %) for the education sector and 11 (55 %) for the live performance sector to 17 (85 %) for the metal, manufacturing and commerce sectors and 18 (90 %) for the food and drink sector (see Table 60). This is in line with the shares of TAW workers in various sector groups, where the industry and construction sector have the highest share and the public service sector, including education, has the lowest share (see Figure 4).

Table 60: Sectors for which member companies of employer organisations / business associations provide the workforce (TAW workers)

	Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	Other sectors
All EOs/BAs	39 (100 %)														
EOs affiliated to WEC-Europe out of the 39 EOs/BAs	20 (51 %)														
EOs/BAs affiliated to WEC-Europe and covering the sector	14	17	12	10	17	12	18	15	14	14	16	17	13	11	14
Out of the 20 EOs/BAs affiliated to WEC-Europe (%)	70	85	60	50	85	60	90	75	70	70	80	85	65	55	70
Out of all 39 EOs/BAs (%)	36	44	31	26	44	31	46	38	36	36	41	44	33	28	36
Number of Member States with EOs/BAs affiliated to WEC-Europe and covering the sector	14	17	12	10	17	12	18	15	14	14	16	17	13	11	14

Notes: BA, business association; EO, employer organisation. The table shows answers to the question ‘Please indicate the sectors/activities the TWAs affiliated to this EO provide TAW [workers] for.’

Source: Network of Eurofound Correspondents, 2023.

Table 61 presents all WEC-Europe's affiliated employer organisations / business associations in terms of representation by size category of the company/TWA. The data show that WEC-Europe represents companies of all sizes. The highest share of WEC-Europe member organisations represent large providers in the sector – that is, those with more than 250 employees. This is the case for 11 employer organisations / business associations from 11 Member States, covering at least 356 companies, based on the available data. Five employer organisations / business associations (or 25 % of WEC-Europe's affiliates) cover small companies – that is, those with 1–9 employees. However, some organisations do not collect information on member companies by size, provided only qualitative estimates or did not provide data. This is the case for 10 WEC-Europe members.

Table 61: Membership of employer organisations / business associations affiliated to WEC-Europe, by company size group – summary

	Total	Member companies per size group (TAW workers on assignment)			
		1–9	10–49	50–249	> 250
Number of EOs/BAs covering this size group	20	5	8	10	11
% of all EOs/BAs affiliated to WEC-Europe (20)	100	25	40	50	55
% of all EOs/BAs (39)	51	13	21	26	28
Number of Member States	20	5 (DE, DK, ES, RO, SE)	8 (AT, DE, DK, ES, LT, PL, RO, SE)	10 (AT, DE, DK, EE, ES, LT, LV, PL, RO, SE)	11 (AT, BG, DE, DK, EE, ES, LT, LV, PL, RO, SE)
Number of member companies	At least 2 326	At least 599	At least 759	At least 612	At least 356

Notes: BA, business association; EO, employer organisation. Note that 10 EOs/BAs provided no data or only qualitative assessments.

Source: Network of Eurofound Correspondents, 2023.

The employer organisations / business associations most commonly reported an upward trend in their membership (nine). The second most common trend was stable membership (seven). Only two employer organisations reported a decrease in their membership; two organisations had no data available. The vast majority of WEC-Europe's members are the largest or the only employer organisation in terms of representation of larger and smaller TWAs. This is the case for 16 employer organisations from 16 Member States (see Table 62).

Table 62: Membership trend and ranking of WEC-Europe-affiliated national employer organisations

	Total number of WEC-Europe affiliates	Trend	Ranking in the national TAW sector in terms of the representativeness of the larger TWAs	Ranking in the national TAW sector in terms of the representativeness of the smaller TWAs
Number of EOs	20	Increasing: 9 Stable: 7 Decreasing: 2 No data: 2	Largest or the only one: 16 (BE, DK, EE, EL, ES, FI, FR, IE, LT, LU, LV, NL, PL, PT, RO, SE) Second largest: 2 (AT, BG) Third largest: 0 No data or only a qualitative estimate: 2 (DE, IT)	Largest or the only one: 13 (BE, DK, EE, EL, ES, FI, FR, IE, LT, LU, LV, PT, SE) Second largest: 2 (AT, NL) Third largest: N.A. No data or only a qualitative estimate: 5 (BG, DE, IT, PL, RO)

Note: EO, employer organisation.

Source: Network of Eurofound Correspondents, 2023.

Remembering the methodological issues related to the calculation of employer / BA organisation density discussed in Chapter 2 (see Section 2.2.1), it is not surprising that employer organisation density rates can be calculated for only four WEC-Europe members. These are EPREL from Estonia, Assolavoro from Italy, Apespe RH from Portugal and the KF from Sweden. In Italy, the proportion of employees in firms organised by the employer organisation Assolavoro reaches 97 %. A high employer organisation density is also reported for the Swedish KF (82 %). In Estonia and Portugal, employer organisation density rates are significantly lower, at 14 % and 10 %, respectively (see Table 63). Other employer organisations provided either only qualitative estimates of their membership or no data (see Table 27).

Table 63: Membership strength and employer organisation density of WEC-Europe's affiliated employer organisations / business associations

Member State	EO/BA name	EO/BA abbreviation	Member of WEC-Europe	Number of TWA members	Membership trend over the 2–3 years prior to the study	Workforce of companies covered	EO density (%) (national employment)	EU EO density (%) (EU employment)
EE	Eesti Personaliettevõtete Liit	EPREL	Yes	6	Has been stable	1 000	14	0.02
IT	Associazione Nazionale di Categoria delle Agenzie per il Lavoro	Assolavoro	Yes	More than 50 TWAs	Increasing	500 000	97	7.64
PT	Associação Portuguesa das Empresas do Setor Privado de Emprego e de Recursos Humanos	Apespe RH	Yes	40	Increased	30 088	10	0.46
SE	Kompetensföretagen	KF	Yes	921	Increased	70 000	82	1.07

Notes: BA, business association; EO, employer organisation. EO density = employees in firms organised in EOs as a proportion of all employees. For the data on national and EU employment used in the calculations, see Table 18. The total number of EU TAW workers (employment in TAW) used for these calculations is based on the national data provided by the Network of Eurofound Correspondents = **6 543 095**.

Sources: Network of Eurofound Correspondents, 2023; data on EOD, own calculations.

Table 64 and Table 65 summarise the involvement of WEC-Europe's affiliated employer organisations and business associations in national bipartite and tripartite social dialogue structures and in collective bargaining for TAW.

Of all WEC-Europe's members, 10 organisations (or 50 %) are categorised as employer organisations and six (or 30 %) are business associations. Four organisations (or 20 %) have dual characteristics of both an employer organisation and a business association. There are thus 14 employer organisations that have the capacity to conclude collective agreements. Of all WEC-Europe's members, 80 % (or 16 organisations) are recognised nationally as representative, based on either the fulfilment of legal requirements or mutual recognition. A minority (9 or 45 %) participate in bipartite or tripartite social dialogue bodies; a higher number (14 or 70 %) are consulted by the government on issues related to the TAW sector. The majority (13 or 65 %) are affiliated to a national umbrella organisation (see Table 64).

Table 64: WEC-Europe's affiliates involvement in social dialogue and public policy at the national level

	Total number	Type of organisation (EO/BA)	EOs/BAs recognised as representative based on national recognition	Involved in bipartite/ tripartite social dialogue bodies	Consulted by government	Affiliated to a national confederation
Number of EOs/BAs	20	BA: 6 EO: 10 Both: 4	16	9	14	13
% of WEC-Europe's affiliate EOs/BAs (20)	100	BA: 30 EO: 50 Both: 20	80	45	70	65
Number of Member States	20	BA: 6 EO: 10 Both: 4	16	9	14	13

Note: BA, business association; EO, employer organisation. See the tables in Annex 1 for a detailed overview for each Member State.

Source: Network of Eurofound Correspondents, 2023.

More than half of WEC-Europe's members (55 % or 11 organisations) are engaged in some form of collective bargaining. The same number of employer organisations / business associations participate in sector-level collective bargaining; only two organisations (from Denmark and Italy) negotiate collective agreements at the company level. Both of the organisations involved in company-level collective bargaining are also involved in sector-level bargaining. The WEC-Europe member from Poland had no data on its involvement in any form of collective bargaining (see Table 65).

Table 65: Involvement of WEC-Europe affiliates in collective bargaining

	Total number of EOs/BAs	Number of EOs/BAs involved in any CB	CB level ^(a)	
			Sector	Company
Number of EOs/BAs	20	11	11	2
% of WEC-Europe affiliate EOs/BAs	100	55	55	10
Number of Member States	20	11	11	2
Number of EOs/BAs with no data on any level of CB	1 (PL)			
Number of Member States in which none of the EOs/BAs in the sector are involved in any CB	8 (AT, BG, EE, EL, IE, LT, LV, RO)			

^(a) CB at the sector level = answer to the question 'Is the EO/BA involved in collective bargaining (CB) at sector level for TAW?'; CB at the company level = answer to the question 'Is the EO involved in collective bargaining at company level for TAW?'

Notes: BA, business association; CB, collective bargaining; EO, employer organisation. See the tables in Annex 1 for a detailed overview for each Member State.

Source: Network of Eurofound Correspondents, 2023.

The last part of the European-level overview of representativeness is the analysis of the involvement of WEC-Europe member organisations in WEC-Europe structures. The majority of members (14 out of 20) are actively involved in WEC-Europe's decision-making structures (see Table 66) ⁽⁴³⁾. The main WEC-Europe decision-making bodies are the Governing Body and the Executive Committee. However, the standing committees (Public Affairs Committee and Sectoral Social Dialogue Committee) prepare decisions and serve as bodies working to align views on public affairs and social dialogue outcomes. All WEC-Europe members are involved in decision-making through the Governing Body, which represents all members. More than half of the affiliates (12 of 20) are actively involved in the various working groups established by the WEC-Europe. None of the organisations report any other European affiliation, although data on three employer organisations were not available.

⁽⁴³⁾ The full list of WEC-Europe Executive Committee members is available online (<https://www.weceurope.org/world-employment-confederation-europe/governance/>).

Table 66: Involvement of WEC-Europe members in WEC-Europe bodies and affiliation to other European organisations

Member State	EO/BA name	EO/BA abbreviation	Directly affiliated to WEC-Europe	Actively involved in WEC-Europe's decision-making structures	Actively involved in WEC-Europe's working groups	Affiliated to other European organisations
AT	Verband Österreichs Personaldienstleister	ÖPDL	Yes	No	No	No
BE	Federgon	Federgon	Yes	Yes	Yes	No
BG	National Employment Confederation	NECB/HK35	Yes	Yes	Not yet	No
DE	Bundesarbeitgeberverband der Personaldienstleister	BAP ⁽⁴⁴⁾	Yes	Yes	Yes	No
DK	Dansk Erhverv	None	Yes	Yes	Yes	No
EE	Eesti Personalitettvõtete Liit	EPREL	Yes	No	No	No
EL	Hellenic Federation of Private Employment Services	Enidea/Ενιδεα	Yes	Most probably yes	Most probably yes	No
ES	Asociación de Agencias de Empleo y Empresas de Trabajo Temporal	Asempleo	Yes	Yes	Yes	No
FI	Henkilöstöala HELA ry	HELA	Yes	No	Yes	No
FR	Prism'emploi	Prism'emploi	Yes	No	Yes	No
IE	Employment and Recruitment Federation	ERF	Yes	Yes	Yes	No
IT	Associazione Nazionale di Categoria delle Agenzie per il Lavoro	Assolavoro	Yes	Yes – the Director General of Assolavoro is a member of the Executive Committee	Yes	No
LT	Lietuvos įdarbinimo įmonių asociacija	LĮJA	Yes	Yes	No	No
LU	FEDIL Employment Services	FES	Yes	Yes	No	No
LV	Latvijas Pagaidu darba aģentūru asociācija	LPDAA	Yes	Most probably	No data	No data
NL	Algemene Bond Uitzendondernemingen	ABU	Yes	Yes	Yes	No
PL	Polskie Forum HR	PFHR	Yes	No data	Yes	No data
PT	Associação Portuguesa das Empresas do Setor Privado de Emprego e de Recursos Humanos	Apespe RH	Yes	No data	No data	No data

⁽⁴⁴⁾ BAP and IGZ merged in December 2023 to form the GVP.

Representativeness of the European social partner organisations: Temporary agency work sector

Member State	EO/BA name	EO/BA abbreviation	Directly affiliated to WEC-Europe	Actively involved in WEC-Europe's decision-making structures	Actively involved in WEC-Europe's working groups	Affiliated to other European organisations
RO	Asociația Furnizorilor de Servicii de Resurse Umane	AFSRU	Yes	Yes	No	No
SE	Kompetensföretagen	KF	Yes	Yes	Yes – those on public affairs and social dialogue	No
Totals		Total number of 'yes' responses	20	14	12	0
		Total number of 'no' responses	0	4	6	17
		Total number with no data	0	2	2	3

Notes: BA, business association; EO, employer organisation. Active involvement in WEC-Europe's decision-making structures was reported through a self-evaluation by national WEC-Europe members. The structure of the organisation allows for the active involvement of every member. According to WEC-Europe, twice a year, all WEC-Europe members are invited to a Governing Body meeting and thus have the opportunity to be actively involved in the decision-making structure. See the tables in Annex 1 for a detailed overview for each Member State.

Source: Network of Eurofound Correspondents, 2023.

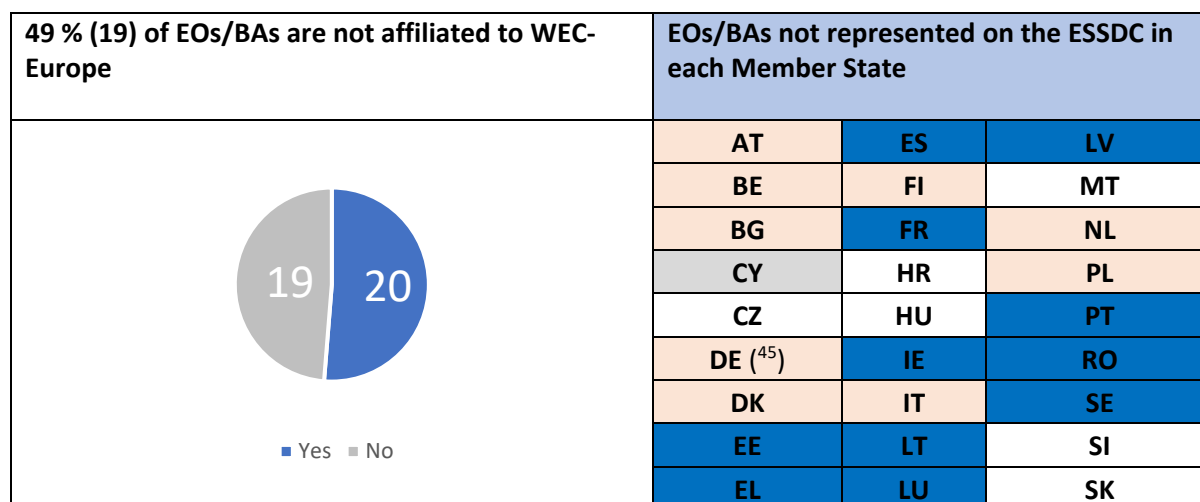
3.5. Employer organisations / business associations not represented on the European sectoral social dialogue committee (sectoral employer organisations / business associations not affiliated to WEC-Europe)

This section looks at those employer organisations / business associations that are not affiliated to WEC-Europe and hence not represented on the ESSDC for TAW. It provides an overview of the limits of and potential for the membership of this European confederation.

Out of the total of 39 employer organisations and business associations across the EU, 19 employer organisations and business associations are not affiliated to WEC-Europe and are therefore not represented on the ESSDC for TAW. The term 'non-represented employer organisations / business associations' will be used for these national employer organisations / business associations in this section. This section demonstrates that WEC-Europe members are more likely to be recognised as representative social partner organisations at the national level (80 % among members compared with 58 % among non-represented organisations), involved in collective bargaining (55 % and 37 %, respectively) and involved in social dialogue bodies (45 % and 37 %, respectively).

The 19 employer organisations / business associations are present in 15 Member States. Once again, these Member States can be categorised into two groups: first, those where all observed employer organisations / business associations are not affiliated to WEC-Europe and, second, those that have multiple employer organisations / business associations, of which only some are affiliated to WEC-Europe. The Member States where all employer organisations /business associations included in this study are not affiliated to WEC-Europe are Croatia, Czechia, Hungary, Malta, Slovakia and Slovenia (6) – which are all Member States where TAW has started to increase only in recent years. The Member States with multiple employer organisations / business associations in the sector, of which some are not represented in the EESDC, are Austria, Belgium, Bulgaria, Denmark, Finland, Germany, Italy, the Netherlands and Poland (9). In almost all of these Member States, there are two employer organisations / business associations in the TAW sector; in Denmark, there are three. WEC-Europe affiliates only one organisation in each Member State. In Cyprus, there is no organisation in operation due to the extremely limited size of the TAW sector: only 19 companies, which employ about 240 workers (see Figure 11).

Figure 11: Employer organisations / business associations not represented on the ESSDC for the TAW sector, by Member State



Notes: BA, business association; EO, employer organisation. Blue shading in cells indicates Member States in which all EOs/BAs in the sector are represented on the ESSDC; orange shading in cells indicates that only some EOs/BAs are represented on the ESSDC; cells with grey shading indicate Member States with no EO/BA; cells with no shading indicate Member States not represented on the ESSDC.

Source: Network of Eurofound Correspondents, 2023.

Turning to the sector-relatedness of the non-represented employer organisations and business associations (see Table 67), the majority of organisations represent companies from different sectors. This finding is the opposite of that for WEC-Europe affiliates. In addition, while WEC-Europe affiliates that cover other sectors mostly have national member companies that cover 'other employment activities' (within NACE 78), non-represented employer organisations and business associations report more diverse sector-relatedness. For instance, VBO-FEB – the largest national-level employer organisation – covers a wide range of sectors across the entire Member State. DI covers the whole private sector in Denmark, and in Czechia the APA also covers retail, accommodation services, cleaning services and the collection of municipal waste.

⁽⁴⁵⁾ Since 1 December 2023, the GVP has been the only employer organisation in the sector and represented on the ESSDC.

Table 67: Sector-relatedness of non-represented employer organisations / business associations

	EO/BA representing enterprises from other sectors	
	Yes	No
Total number of EOs/BAs ^(a)	10	8
% of all EOs/BAs not affiliated to WEC-Europe (19)	53	42
% of all EOs/BAs (39)	26	21
Number of Member States with an EO/BA	8 (AT, BE, BG, CZ, DK, FI, IT, MT)	7 (DE, HR, HU, NL, PL, SK, SI)

^(a) The information on VB from Denmark was unavailable.

Note: BA, business association; EO, employer organisation.

Source: Network of Eurofound Correspondents, 2023.

Table 68 summarises the sectors for which the member companies of non-represented employer organisations / business associations provide TAW workers. Manufacturing (17), metal (15), commerce (15), road transport (15) and courier services (15) are the sectors for which non-affiliate employer organisations / business associations most commonly provide TAW workers. These sectors are similar to those receiving TAW workers from employer organisations and business associations affiliated to WEC-Europe (see Table 60).

Table 68: Sectors for which member companies of non-represented employer organisations / business associations provide the workforce (TAW workers)

	Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	Other sectors
All EOs/BAs	39 (100 %)														
EOs not affiliated to WEC-Europe out of the 39 EOs/BAs	19 (49 %)														
EOs not affiliated to WEC-Europe and covering the sector	14	15	11	10	15	11	13	15	15	12	11	17	8	7	12
Out of the 19 EOs/BAs not affiliated to WEC-Europe (%)	74	79	58	53	79	58	68	79	79	63	58	89	42	37	63
Out of all 39/BAs EOs (%)	36	38	28	26	38	28	33	38	38	31	28	44	21	18	31
Number of Member States with EOs/BAs not affiliated to WEC-Europe and covering the sector	12	12	10	9	13	10	11	13	12	10	10	15	7	6	11

Notes: BA, business association; EO, employer organisation. The table shows answers to the question 'Please indicate the sectors/activities the TWAs affiliated to this EO provide TAW [workers] for.'

Source: Network of Eurofound Correspondents, 2023.

Altogether, employer organisations / business associations that are not affiliated to WEC-Europe represent at least 2 430 companies of various sizes. This is almost the same number as WEC-Europe's affiliates, which represent at least 2 326 companies of various sizes. However, for seven non-represented organisations/associations, data on membership by company size were missing. The member companies of non-represented employer organisations / business associations are relatively equally distributed among those with 1–9 employees (42 %) and those with 10–49 employees (53 %). The most common size of the affiliated companies is 50–249 employees on assignment (13 or 68 %) (see Table 69).

Table 69: Membership of non-represented employer organisations / business associations, by company size group – summary

	Total	Member companies per size group (TAW workers on assignment)			
		1–9	10–49	50–249	> 250
Number of EOs/BAs covering this size group	19	8	10	13	12
% of all non-represented EOs/BAs (19)	100	42	53	68	63
% of all EOs/BAs (39)	49	21	26	33	31
Number of Member States	15	7 (AT, BG, CZ, DK, HR, HU, NL)	9 (AT, BG, CZ, DK, FI, HR, HU, NL, PL)	11 (AT, BG, CZ, DK, FI, HR, HU, MT, NL, PL, SK)	10 (AT, BG, CZ, DK, FI, HR, HU, MT, NL, SK)
Number of member companies	At least 2 430	At least 622	At least 593	At least 777	At least 438

Notes: BA, business association; EO, employer organisation. Seven EOs/BAs provided no data or only qualitative assessments. In some categories, numbers do not add up to the total of 19, since organisations with only qualitative assessments were included in the overall count.

Source: Network of Eurofound Correspondents, 2023.

Overall, 11 of the employer organisations / business associations (58 %) from 10 Member States are the largest in their Member State, in terms of representing the larger TWAs, and 6 (32 %) from 6 Member States are the second largest. For the smaller TWAs, data are largely missing and fragmented. Around half of the organisations reported that their membership is increasing and only three organisations reported a decreasing trend. Five employer organisations / business associations reported their membership to be stable and two did not provide any estimate on the trend (see Table 70).

Table 70: Membership trend and ranking of non-represented national employer organisations / business associations

	Total number of non-represented EOs/BAs	Trend	Ranking in the national TAW sector in terms of the representativeness of the larger TWAs	Ranking in the national TAW sector in terms of the representativeness of the smaller TWAs
Number of EOs/BAs	19	Increasing: 9 Stable: 5 Decreasing: 3 No data: 2	Largest or the only one: 11 (AT, BG, CZ, DE, DK, HR, HU ^(a) , MT, SK, SI) Second largest: 6 (BE, CZ, FI, MT, NL, PL) Third largest: 0 Not among the three largest: 1 (DK) No data or only a qualitative estimate: 1 (IT)	Largest or the only one: 7 (AT, BG, DE, HR, MT, NL, SI) Second largest: 4 (BE, DK, FI, MT) Third largest: 0 Not among the three largest: 1 (DK) No data or only a qualitative estimate: 7 (CZ, HU, IT, PL, SK)

^(a) In Hungary, Diákész is the largest EO/BA representing member companies that employ a student workforce. The count for Hungary thus includes two employer organisations / business associations, one that is the largest overall and one that is the largest of a specific subsector (See Table 70).

Notes: BA, business association; EO, employer organisation.

Source: Network of Eurofound Correspondents, 2023.

Table 71 presents the employer/BA organisation density rates for those organisations that provided data on their membership. As can be seen from Table 71, calculations were possible for only 5 of the 19 employer organisations / business associations, as the others provided either only qualitative estimates of their membership or no data (see Table 27). Note that the high density rate of the MEA suggests that it represents more workers than the overall reported number of TAW workers in Malta. The computed EU employer organisation density rates give an idea of the relative strength of these organisations at the EU level. For a full overview for each Member State, see Annex 2.

Table 71: Membership strength and employer organisation density of non-represented employer organisations / business associations

Member State	EO/BA name	EO/BA abbreviation	Member of WEC-Europe	Number of TWA members	Membership trend over the 2–3 years prior to the study	Workforce of companies covered	EO density (%) (national employment)	EU EO density (%) (EU employment)
CZ	Association of Personal Service Providers	APPS	No ⁽⁴⁶⁾	30	Decreased	58 900	22	0.9
DE	Association of German Temporary Employment Agencies	IGZ	No	3 778	Increased	310 000	38	4.7
HU	Magyarországi Diák vállalkozások Országos Érdekképviselői Szövetsége	Diákész	No	16	Increased	100 000	46	1.5
MT	Malta Employers Association	MEA	No	20	Stable	10 000	110	0.15
MT	Malta Chamber of SMEs	SME Chamber	No	8	Increased	1 500	16	0.02

Notes: BA, business association; EO, employer association. EO density = employees in firms organised in EOs as a proportion of all employees. For the data on national and EU employment used in the calculations, see Table 18. The total number of EU TAW workers (employment in TAW) used for these calculations is based on the national data provided by the Network of Eurofound Correspondents = **6 543 095**.

Sources: Network of Eurofound Correspondents, 2023; data on EO density, own calculations.

The majority of non-represented members are classified as employer organisations rather than business associations. In terms of their positions in the industrial relations landscape, 11 out of 19 organisations (58 %) are considered representative according to national rules. Seven of the organisations (37 %) are involved in bipartite or tripartite social dialogue at the national level; however, more are consulted by the government (14 or 74 %) on issues related to the TAW sector. Some organisations are consulted indirectly – for example, the BEC is consulted through its national-level confederation, the Bulgarian Industrial Capital Association. Consultations are mostly done on an ad hoc basis. Finally, 63 % are affiliated to a relevant national confederation (see Table 72).

⁽⁴⁶⁾ APPS joined WEC-Europe after the information collection for this representativeness study was completed and is therefore not counted as a member of WEC-Europe for the purposes of this study.

Table 72: Non-represented employer organisations / business associations and their involvement in social dialogue and public policy at the national level

	Total number	Type of organisation (EO/BA)	EOs/BAs recognised as representative based on national recognition	Involved in bipartite/ tripartite social dialogue bodies	Consulted by government	Affiliated to a national confederation
Number of EOs/BAs	19	BA: 6 EO: 11 Both: 2	11	7	14	12
% of non-represented EOs/BAs (19)	100	BA: 32 EO: 58 Both: 11	58	37	74	63
Number of Member States	15	BA: 6 EO: 11 Both: 2	10	6	11	9

Notes: BA, business association; EO, employer organisation. See the tables in Annex 1 for a detailed overview for each Member State.

Source: Network of Eurofound Correspondents, 2023.

Only 37 % (7 out of 19) of the non-represented organisations are involved in collective bargaining, and, when involved, it is usually at the sector level. Employer organisations / business associations from eight Member States are not involved in any form of collective bargaining (see Table 73); data were not available for one Member State. The six organisations involved in just sector-level bargaining are the FVGD (Austria), VBO-FEB (Belgium), DI (Denmark), PALTA (Finland), the IGZ (Germany) and the NBBU (Netherlands). Two of them are national-level employer organisations / business associations, covering all sectors (Belgium, Denmark). Only one organisation, the VB (Denmark), is involved in both sector- and company-level collective bargaining. It is also the only organisation that is indirectly represented by WEC-Europe, through its membership of Dansk Erhverv (Denmark).

Table 73: Involvement of non-represented employer organisations / business associations in collective bargaining

	Total number of EOs/BAs	Number of EOs/BAs involved in any CB	CB level ^(a)	
			Sector	Company
Number of EOs/BAs	19	7	7	1
% of all non-represented EOs/BAs (19)	100	37	37	5
Number of Member States	15	6	6	1
Number of EOs/BAs with no data on any level of CB	1 (IT)			
Number of Member States in which none of the EOs/BAs in the sector are involved in any CB	8 (BG, CZ, HR, HU, MT, PL, SK, SI)			

^(a) CB at the sector level = answer to the question 'Is the EO/BA involved in collective bargaining (CB) at sector level for TAW?'; CB at the company level = answer to the question 'Is the EO involved in collective bargaining at company level for TAW?'

Notes: BA, business association; CB, collective bargaining; EO, employee organisation. See the tables in Annex 1 for a detailed overview for each Member State.

Source: Network of Eurofound Correspondents, 2023.

3.6. Other employer organisations

During the data collection process, all employer organisations were asked to report their membership of any other European association for their TWA members. Only one employer organisation reported other membership: VBO-FEB from Belgium, which is not affiliated to WEC-Europe, reported membership to BusinessEurope.

Therefore, it can be concluded that there are no other relevant EU-level employer confederations, and WEC-Europe is the representative organisation for TAW.

3.7. Capacity to negotiate and represent all affiliated organisations

This section analyses the third criterion for representativeness: having the capacity to negotiate agreements that can be implemented by Council decision, as provided for by Article 155 of the TFEU.

The previous representativeness study on TAW, published in 2016, analysed this capacity by looking at the statutes/constitutions of UNI Europa and Eurociett (the predecessor of WEC-Europe), and concluded that:

Both UNI Europa and Eurociett have specific procedures to define the positions to be presented within the European social dialogue framework.

*Following an inquiry in the context of this study, UNI Europa and Eurociett confirmed that **both organisations have been given a statutory mandate to negotiate on behalf of its members** [emphasis added]. This mandate is defined in the UNI Europa's statutes and Eurociett's constitution.*

(Eurofound, 2016)

Several other representativeness studies, such as Eurofound's 2024 representativeness study on the postal sector, concluded that UNI Europa has a statutory capacity to negotiate on behalf of its members.

WEC-Europe's constitution, ratified in 2005 and amended in 2008, 2010 and 2018, sets out the following main functions of the organisation, among others:

- *represent its members with all of the institutions concerned. Its main activity consists of ensuring that European laws and regulations that affect the members' interests are as compatible as possible with the members' growth and prosperity;*
- *promote the industry's HR [human resources] services and related activities, in particular triangular employment relationships, and attempt to assure between its members mutual relations based on fair competition and to avoid any discriminatory practices within the industry;*
- *negotiate with European institutions and organisations (for example, in the form of social dialogue) and, if expressly requested by a Federation member, with the government or official organisations of this member's country.*

(Constitution of the World Employment Confederation Europe, paragraph II, Article 3 'Main functions')

UNI Europa's statutes also claim this capacity:

The role of UNI Europa shall be to deal with issues of concern to the affiliates and their members within the region and to further the aims and objectives as set out in the UNI Statutes.

(UNI Europa statutes, Article 2.1 'Objectives')

They then specify the methods of achieving several of these objectives:

- a) *deciding policy and action with respect to the institutions of the European Union to ensure that there is a social and democratic dimension to European integration,*
- b) *representing affiliates in European institutions whose activities affect the social, economic and cultural conditions of affiliates and their members,*
- [...]
- f) *co-ordinating the activities of UNI affiliates in Europe and offering assistance and support as appropriate,*
- [...]
- l) *establishing common policies and priorities for action to promote and co-ordinate their implementation,*
- [...]
- o) *undertaking collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee,*
- p) *encouraging affiliation to UNI and the participation of such affiliates in the work of UNI Europa and its sectors.*

(UNI Europa statutes, Article 3.1 'Methods')

3.8. Effective participation in European sectoral social dialogue committee meetings

This section analyses the effective participation in the work of the ESSDC for TAW.

In order to assess the effective participation of UNI Europa Agency Workers and WEC-Europe in the ESSDC for TAW, attendance of the meetings held during 2020, 2021, 2022 and 2023 was analysed. Three meetings were held in each of the four years. Most of the meetings were face to face; only one meeting was virtual (February 2023). The meetings were held in January 2020, June 2020, October 2020, February 2021, May 2021, October 2021, February 2022, June 2022, October 2022, February 2023, June 2023 and October 2023.

Based on participation data provided by the European Commission, Table 74 summarises the meeting attendance of trade union and employer representatives from each Member State. The data are summarised for the three meetings per year and show if a Member State was represented in at least one of the three meetings. Member States are considered not represented if they did not participate in any of the meetings – that is, if they were absent from all three meetings in one year.

Table 74 shows that, between 2020 and 2023, trade unions affiliated to UNI Europa Agency Workers from eight or nine Member States were represented on the ESSDC for TAW. This means that, out of the 15 Member States with affiliates, the majority are covered and represented on the ESSDC. On the employer side, employer organisations / business associations affiliated to WEC-Europe from 10 or 11 Member States participated in the ESSDC meetings during 2020–2023. Therefore, out of the 20

Member States with employer organisations / business associations that are members of WEC-Europe, only half of them are represented on the ESSDC.

Affiliates of UNI Europa Agency Workers from 5 out of 15 Member States – namely Bulgaria, Germany, Luxembourg, Latvia, and Poland – did not participate in any meetings of the EESDC during 2020–2023. This means that some Member States with large numbers of TAW workers, such as Germany or Poland, are not represented in the work of the EESDC.

WEC-Europe affiliates from 9 out of 20 Member States did not participate in any of the meetings during 2020–2023, which points to a persistent gap in their effective participation. This includes employer organisations / business associations from Austria, Bulgaria, Estonia, Finland, Greece, Latvia, Lithuania, Luxembourg and Portugal.

WEC-Europe was also represented by its multinational member companies. For more detailed information on the effective participation in each meeting, see Table A12 in Annex 1.

Table 74: Effective participation in the ESSDC for TAW, 2020–2023

	2020	2021	2022	2023
Trade unions				
Number of Member States with TU (UNI Europa Agency Workers member) participation in at least one meeting of the ESSDC for TAW (out of 15 Member States)	9 (AT, DK, ES, FI, FR, IT, NL, PT, SE)	9 (AT, BE, ES, FI, FR, IT, NL, PT, SE)	8 (BE, DK, ES, FR, IT, NL, PT, SE)	8 (BE, DK, ES, FI, IT, NL, PT, SE)
Number of Member States where UNI Europa Agency Workers has an affiliate but no participation in any ESSDC meeting (out of 15 Member States)	6 (BE, BG, DE, LU, LV, PL)	6 (BG, DE, DK, LU, LV, PL)	7 (AT, BG, DE, FI, LU, LV, PL)	7 (AT, BG, DE, FR, LU, LV, PL)
Employers				
Number of Member States with employer (WEC-Europe member) participation in at least one meeting of the ESSDC for TAW (out of 20 Member States)	10 (BE, DE, DK, ES, FR, IE, IT, NL, PL, SE)	11 (BE, DE, DK, ES, FR, IE, IT, NL, PL, RO, SE)	10 (DE, DK, ES, FR, IE, IT, NL, RO, PL, SE)	10 (DE, DK, ES, FR, IE, IT, NL, PL, RO, SE)
Number of Member States where WEC-Europe has an EO/BA affiliated but no participation in any ESSDC meeting (out of 20 Member States)	10 (AT, BG, EE, EL, FI, LT, LU, LV, PT, RO)	9 (AT, BG, EE, EL, FI, LT, LU, LV, PT)	10 (AT, BE, BG, EE, EL, FI, LT, LU, LV, PT)	10 (AT, BE, BG, EE, EL, FI, LT, LU, LV, PT)

Notes: BA, business association; EO, employer organisation; TU, trade union. Multinational companies (members of WEC-Europe) are excluded from the table. For full details, please see Annex 1.

Source: Authors' compilation based on data from the European Commission.

4. Conclusions

The assessment of the representativeness of the social partners in TAW is challenging because TAW can be considered a form of employment or a type of workforce rather than a sector, and thus covers all industries. In addition, there are diverse regulations on TAW activities at the national level, including various mechanisms for collective bargaining, varying coverage of collective agreements and very different mechanisms for representing the interests of both TAW workers and companies (TWAs). The most important aspect of TAW is the distinct triangular relationship that characterises this sector. The findings of this study are very similar to those of the previous representativeness study, conducted in 2016; however, the current version offers a different level of analysis (see Table 75).

Between 2021 and 2023, the percentage of TAW workers in the EU, measured as the share of employees who have a contract with a TWA for their main job, was stable at about 2.5 % on average ⁽⁴⁷⁾. In 2023, the percentage was 2.4 %. In terms of absolute numbers, more than 4.2 million workers were employed through a TWA in 2021. In 2023, the Member States with the highest shares of TAW workers were Latvia (6.1 %), Slovakia (5.6 %), Slovenia (5.0 %), the Netherlands (4.9 %), Ireland (4.6 %) and Spain (4.3 %).

The highest share of TAW workers is in industry and construction (3.3 %), followed by the cluster covering information and communication, financial and insurance activities, real estate activities, professional, scientific and technical activities and administrative and support service activities (3.0 %). The lowest share of TAW workers is in the public sector, which covers education and healthcare, arts and entertainment and some other activities (1.3 %).

There are 29 194 companies in NACE 78.2 in the EU; this is the highest number recorded since 2012. The majority of companies in the sector are microcompanies and small businesses, with 0–9 employees. This has possible implications for their organisational capacity to join employer organisations / business associations. Of the estimated 3 600 000 people employed in NACE 78.2 in 2022, the majority (81 % or 2 927 122) worked in large companies (those with more than 250 employees).

This study identified 67 trade unions and 39 employer organisation and business associations in the TAW sector (see Table 75 and Figure 12). In 21 Member States, there is at least one trade union organising or representing TAW workers; 26 Member States have at least one employer organisation / business association. In total, 6 of the 27 Member States – namely Croatia, Cyprus, Estonia, Greece, Lithuania and Romania – have no trade union representation for TAW workers. Cyprus is the only Member State where employers are not organised in any employer organisation / business association for TWAs. Overall, 67 trade unions across 21 Member States organise at least 251 896 TAW workers.

The cumulative organisational density of trade unions, measured for each Member State based on available data, varies between 1 % (in Czechia, Hungary, the Netherlands, Portugal and Slovenia) and 96 % (in Sweden). However, these estimates suffer from missing data, as data were unavailable on at least 30 trade unions.

⁽⁴⁷⁾ See Table 5, which presents data on the number of TAW workers from various sources. Averaging the data from multiple sources points to a value of about 2.5 % for TAW workers in the EU.

Overall, 30 (44.8 %) trade unions participate in sectoral social dialogue bodies dealing with questions related to the TAW sector. Of the 67 trade unions, 43 (64.2 %) are involved in collective bargaining, either for TAW as a sector or at the company level. Close to half of the unions (31 or 46.3 %) are involved in collective bargaining at the sectoral level, and only 16 trade unions (23.9 %) negotiate collective agreements at the company level.

Between 1 % and 11.0 % of EU TAW workers are not represented by any trade union at the national level, and hence are also not represented at the EU level.

This study identified 39 national sectoral employer organisations and business associations from 26 Member States. Only Cyprus has no employer or business representation in TAW. Overall, there are 11 453 companies represented by 39 employer organisations / business associations across 26 Member States. Of the 29 194 companies across the EU in 2022, 39.2 % were affiliated to employer organisations / business associations in 2023. The shares of companies covered vary between 1 % and 131 %. Shares of more than 100 % suggest that some organisations have members involved in other types of activities. While data on the shares of companies covered are available for all employer organisations / business associations, many employer organisations / business associations did not report absolute numbers of workforce covered, which are necessary for calculation of employer organisation density rates. According to their self-reported estimates, they cover between 26 % and 100 % of workers, but, in general, employer organisations / business associations reported relatively high density rates.

The majority of employer organisations / business associations (69 %) are recognised nationally as representative organisations, based on either the fulfilment of legal requirements or mutual recognition. Fewer than half (41 %) participate in bipartite or tripartite social dialogue bodies. Out of the 39 employer organisations / business associations, 46 % (or 18 organisations) are engaged in some form of collective bargaining. Almost half of them (46 %) participate in sector-level collective bargaining, and only 8 % participate at the company level. In 14 Member States (more than half), none of the employer organisations / business associations in the TAW sector are involved in any form of collective bargaining.

This study also looked at the 73 largest companies in the sector across the EU. Of the 73 TAW companies covered by this study, 39 (53.4 %) are involved in some form of collective bargaining; the remaining 46.6 % either reported no collective bargaining or provided no data. The most dominant form is MEB (27 TWAs).

The overview of collective bargaining practices shows that, out of the 67 trade unions, the majority (43 or 64 %) engage in some form of collective bargaining. The prevailing level is MEB (31 unions). Thirteen unions (less than 20 %) do not engage in any collective bargaining; 11 unions had no data available. The majority of employer organisations / business associations (20 or 51 %) do not engage in collective bargaining, but 18 (46 %) participate in some form of collective bargaining. Again, the most frequent form is MEB, although it is less common, with only 15 organisations (38 %) engaging in this type of bargaining.

Two sector-related European organisations are listed as representative for TAW: UNI Europa Agency Workers represents the workforce of this sector, and WEC-Europe represents the employers.

There are 32 trade unions (48 % of all unions) affiliated to UNI Europa Agency Workers, covering 15 Member States. This means that the majority of unions in the TAW sector are not affiliated to UNI Europa Agency Workers. However, due to the (albeit small) difference in percentage found when excluding unions with no TAW members, these results must be interpreted with caution. Nevertheless, it is safe to conclude that the distribution is more or less equal and that about half of all unions are members of UNI Europa Agency Workers.

Altogether, unions that are members of UNI Europa Agency Workers cover at least 53 215 TAW workers or 21.1 % of the 251 896 workers covered by all identified trade unions in TAW. However, 59 % of members did not provide data on their membership. The TUD of all members of UNI Europa Agency Workers is at least 0.8 %, although the majority of unions did not report any membership data. The available data point to a TUD rate that starts somewhere between 0.8 % and 1.5 %, and it may be higher, given the missing data. No reliable estimates can be calculated of the share of TAW workers who are members of unions affiliated to UNI Europa Agency Workers.

Overall, 17 out of the 32 national unions affiliated to UNI Europa Agency Workers are involved in social dialogue bodies for the regulation of the TAW sector; the remaining unions have no such involvement or did not provide data. The majority (24 or 75.0 %) are involved in some form of collective bargaining. Sector-level bargaining is reported by the majority of unions (17 or 53.1 %). Company-level bargaining is less common, with only 11 unions (34.4 %) from six Member States reporting it. The remaining unions are often not involved in collective bargaining because no such negotiations take place in general or specifically for the TAW sector.

WEC-Europe has 20 affiliated national employer organisations and business associations active in the TAW sector in 20 Member States ⁽⁴⁸⁾. Altogether, they represent at least 2 326 companies across all size groups. The highest share of WEC-Europe member organisations represent large companies – that is, those with more than 250 employees. This is the case for 11 employer organisations / business associations, covering at least 356 companies. There are large gaps in the data on employer organisation density, and this study was only able to compute employer organisation density rates for four WEC-Europe members.

A minority of WEC-Europe affiliate employer organisations and business associations (9 or 45 %) participate in bipartite or tripartite social dialogue bodies; a higher number (14 or 70 %) are consulted by the government on issues related to the TAW sector. The majority (13 or 65 %) are affiliated to a national umbrella organisation. More than half of WEC-Europe's members (55 % or 11 organisations) are engaged in some form of collective bargaining. The same number of employer organisations / business associations participate in sector-level collective bargaining; only two organisations negotiate collective agreements at the company level.

This study confirms that UNI Europa Agency Workers and WEC-Europe are the main EU-level organisations active in the industry, and hence also the most representative. There is no other EU-level organisation with a significant number of members on the union or employer side.

Both UNI Europa Agency Workers and WEC-Europe have gaps in coverage of the workforce/companies in the sector. Figure 12 summarises the findings of this representativeness study and highlights the

⁽⁴⁸⁾ In Czechia, APPS joined WEC-Europe in 2024, after the information collection for this study was completed, and is therefore not taken into account in these numbers.

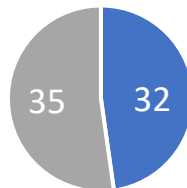
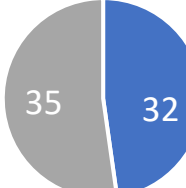
vast opportunities for the inclusion of workers or companies currently not represented on the ESSDC for TAW.

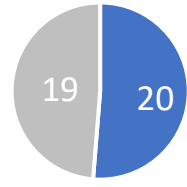
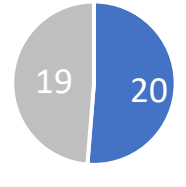
Among all identified trade unions, 52 % are not represented by UNI Europa Agency Workers. As shown in this study, this number is to be treated with caution. Nevertheless, the trend is clear: about half of the unions are affiliated to UNI Europa Agency Workers for their TAW workers, while the other half are not.

Among all identified employer organisations / business associations, 49 % are not represented by WEC-Europe.

The missing data on membership on the union and employer sides have significant negative effects on the assessment of coverage in the sector.

Figure 12: Summary overview of the assessment of representativeness in the TAW sector

TUs represented by UNI Europa Agency Workers				Non-represented TUs					
48 % (32) of TUs with members in the TAW sector are affiliated to UNI Europa Agency Workers		UNI Europa Agency Workers coverage in each Member State		52 % (35) of TUs with members in the TAW sector are not affiliated to UNI Europa Agency Workers		TUs not represented on the ESSDC in each Member State			
 ■ Yes ■ No		AT	ES	LV	 ■ Yes ■ No		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

EOs/BAs represented by WEC-Europe				Non-represented EOs/BAs					
51 % (20) of all EOs/BAs are affiliated to WEC-Europe		WEC-Europe coverage in each Member State		49 % (19) of EOs/BAs are not affiliated to WEC-Europe		EOs/BAs not represented on the ESSDC in each Member State			
 ■ Yes ■ No		AT	ES	LV	 ■ Yes ■ No		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: BA, business association; EO, employer organisation; TU, trade union. For UNI-Europa members and WEC-Europe members (left column), **Blue shading** indicates Member States in which WEC-Europe has a member organisation; cells with **grey shading** indicate Member States with no EO/BA; cells with no shading indicate Member States not represented on the ESSDC. For non-represented TUs and EOs/BAs (right column), **Blue shading** in cells indicates Member States in which all TUs or EOs/BAs in the sector are represented on the ESSDC; **orange shading** in cells indicates that only some TUs or EOs/BAs are represented on the ESSDC; cells with **grey shading** indicate Member States with no TUs or EOs/BAs; cells with no shading indicate Member States not represented on the ESSDC.

Source: Network of Eurofound Correspondents, 2023.

Both UNI Europa Agency Workers and WEC-Europe have the capacity to negotiate agreements that can be implemented by Council decision, as provided for by Article 155 of the TFEU. This is based on the assessment of their statutes/constitutions and the assessment of the capacity of their national members to negotiate collective agreements.

The members of both UNI Europa Agency Workers and WEC-Europe participate regularly in the meetings of the ESSDC for TAW. The analysis of the participation data shows that, between 2020 and 2023, the majority of Member States were regularly represented by unions that are members of UNI Europa Agency Workers (on average, 9 out of 15 Member States). On the employer side, only half of the Member States (on average, 10 out of 20 Member States) are regularly represented in the ESSDC for TAW. The participation data also show regular patterns of those Member States that are always represented and those that are never represented. Table 75 compares the findings of this study with those from the 2016 study.

Table 75: Comparison of the findings in the TAW representativeness study, 2016 and 2025

2016		2025	
Sector-related TUs identified 59 TUs in 21 Member States (no TUs in CY, EE, EL, HR, LT and RO)	Sector-related EOs identified 40 EOs in 25 Member States (no EOs in CY and MT)	Sector-related TUs identified 67 TUs in 21 Member States (no TUs in CY, EE, EL, HR, LT and RO)	Sector-related EOs identified 39 EOs in 26 Member States (no EOs in CY)
Collective bargaining coverage rates were very high (90–100 %) in Member States from western and northern Europe; meanwhile, in the central and eastern European region and in a number of southern Member States, collective bargaining rarely takes place MEB at the intersectoral and sectoral levels 6 Member States (AT, DE, LU, NL, PT, SE) SEB and MEB 8 Member States (BE, DE, DK, ES, FI, FR, IT, NL) Bargaining at the company/plant level only 4 Member States (BG, CZ, IE, MT) No CB at all 11 Member States (CY, EE, EL, HR, HU, LT, LV, PL, RO, SI, SK)		Collective bargaining coverage rates were very high (90–100 %) in Member States from western and northern Europe; meanwhile, in the central and eastern European region and in a number of southern Member States collective bargaining rarely takes place MEB at the intersectoral and sectoral levels 9 Member States (AT, DE, DK, FI, IT, LU, NL, PT, SE) SEB and MEB 3 Member States (BE, ES, FR) Bargaining at the company/plant level only 1 Member State (MT) Some CB but no info 3 Member States (CZ, IE, PL) No CB at all 11 Member States No CB: 5 Member States (BG, HU, LV, SI, SK) No unions: 6 Member States (CY, EE, EL, HR, LT, RO)	
Representative European TU organisation UNI Europa Agency Workers was the representative TU organisation and had 32 direct affiliations in 16 Member States (no members in BG, CY, EE, EL, HU, HR, LT, RO, SI, SK)	Representative European EO organisation Eurociett had 25 direct affiliations in 25 Member States (no member in CY and no EO in MT)	Representative European TU organisation UNI Europa Agency Workers is the representative TU organisation and has 32 direct affiliations in 15 Member States (no member in CZ, HU, IE, MT, SI, SK; no TUs in CY, EE, EL, HR, LT, RO)	Representative European EO organisation WEC-Europe has 20 direct affiliations in 20 Member States (no members in CZ, HR, HU, MT, SI, SK; no EO in CY)
Other European TU associations IndustriAll Europe – 12 direct affiliations in 9 Member States, out of which 8 TUs from 7 Member States were not also affiliated to UNI Europa Agency Workers ETUC – 9 direct affiliations, of which 8 TUs in 5 Member States were not also affiliated to UNI Europa Agency Workers	Other European EO organisations No EU-level employer organisation seemed relevant to the sector and had national affiliates in more than 2 Member States Eurocommerce had one affiliate in Denmark; the European Construction Industry Federation had one affiliate in Sweden	Other European TU associations No other EU-level TU organisation has a significant number of members There are 8 in total: IndustriAll (3), EFFAT (1), the ETF (1), ETUC (1), EPSU (1), the EMA (1), the EPBS (1) and the European Federation of Radiographer Societies (1)	Other European EO organisations There is no other EU-level employer organisation

Notes: EO, employer organisation; TU, trade union. Source: Eurofound, 2016, and Network of Eurofound Correspondents, 2023.

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Annexes

Annex 1. Tables

Table A76: Temporary employment agency workers aged 15–64 (%), by Member State, 2008–2023

Member State	2008		2009		2010		2011		2012		2013		2014		2015		2016		2017		2018		2019		2020		2021		2022		2023	
EU-27	1.9		1.5		1.7		1.8		1.7		1.7		1.7		1.8		1.9		2.1		2.1		2.1		2.6		2.5	b	2.5		2.4	
AT	2.0		1.8		2.0		2.3		2.1		2.1		2.2		2.2		2.3		2.3		2.4		2.3		2.1		2.4	b	2.4		2.2	
BE	1.8		1.6		1.7		1.7		1.8		1.6		1.7		2.0		2.1		2.3	b	2.2		2.4		1.9		2.0	b	1.9		1.4	
BG	N.D.	bu	N.D.	u	N.D.		N.D.		N.D.		N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	bu	N.D.	bu	N.D.	u
CY	N.D.		N.D.		N.D.	u	N.D.		N.D.		N.D.		N.D.		N.D.		N.D.	u	N.D.		N.D.		N.D.		N.D.		N.D.		N.D.		N.D.	
CZ	0.9		1.0		1.1		1.3	b	1.6		1.4		1.7		1.9		1.3		1.5		1.1		1.3		1.2		1.6	b	2.3		1.4	
DE	1.9		1.7		2.2	b	2.4		2.1	b	2.0		1.9		1.9		2.1		2.6		2.6		2.3		5.5	b	2.8	b	3.2		2.8	
DK	1.4	b	1.0		0.9		1.2		1.0		1.0		1.2		0.7		0.8	b	0.8	b	0.7		0.6		0.6		0.7	b	0.6		0.6	
EE	N.D.	u	N.D.	u	N.D.	u	N.D.	u	0.3	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	u	N.D.	bu	N.D.	u	N.D.	u
EL	0.3		0.4	b	0.4		0.3		0.4		0.5		0.3		0.3		0.5		0.3		0.2		0.3		0.3		16.3 ^(a)	b	0.6		0.6	
ES	4.1		3.0	b	3.0		2.7		2.7		3.0		2.8		2.9		3.0		3.4		3.9		4.1		3.5		4.2	bd	3.9	d	4.3	d
FI	1.3		0.9		1.2		1.2		1.1		1.1		1.3		1.4		1.8		1.7		1.9		1.9		1.6		2.0	b	2.7		2.5	
FR	2.4		2.0		2.1		2.4		2.3		2.4		2.5	b	2.4		2.7		3.3		2.8		3.1		2.4		2.7	bd	2.7	d	2.5	d
HR	0.7		0.8		0.6	u	0.6	u	0.9		1.2		1.0	b	1.1		1.2		0.7		0.6	u	1.0		0.9		1.0	b	1.3		1.0	b
HU	0.7		0.8		0.8		1.0		1.0		0.8		0.9		0.9		0.4		0.3		0.3		0.3		0.3		0.4	b	0.5		0.5	
IE	0.9		0.8		0.7		0.9		1.0		1.2		1.2		1.1		1.3		2.4	b	2.7		2.8		2.5		2.5	b	3.7		4.6	
IT	0.7		0.5		0.6		0.6		0.6		0.6		0.6		0.7		0.8		0.9		1.1	b	1.0		0.9		1.1	b	1.0		0.8	
LT	1.0	u	0.5	u	0.4	u	0.6	u	0.7		0.7		0.8		1.7		1.8		1.9		1.8		2.2		2.1		0.9	b	0.7		0.8	
LU	0.5		1.4	b	1.7		1.4		1.6		1.5		1.5		2.1	b	1.8		1.7		1.7		1.7		1.2		2.6	b	97.7		97.5	
LV	4.4		1.8		2.3		2.3		1.9		1.0		0.9		1.1		0.7		1.2		1.2		1.4		1.9		3.3	b	4.8		6.1	
MT	N.D.	u	N.D.		N.D.		1.2		N.D.		N.D.	u	N.D.		N.D.		N.D.	u	N.D.		N.D.		3.4		7.5		1.8	b	3.4		3.6	
NL	3.5		2.8		2.9		2.9		2.9		2.9		3.5		3.6		4.1		3.9		4.1		3.8		3.0		5.2	b	5.2		4.9	
PL	0.5		0.6		0.6	b	0.5		0.6		0.6		0.7		0.9		0.9		0.8		0.8		0.7	b	0.5		0.5	b	0.4		0.5	
PT	2.4		2.0		2.1		2.0	b	1.9		2.1		2.1		2.0		2.1		2.0		2.0		1.8		1.4		1.8	b	1.4		1.3	
RO	0.9		0.8		0.8	b	0.9		0.8		1.0		1.2		1.0		1.0		1.0		0.8		0.5		0.4		0.2	b	0.3		0.5	
SE	1.2		1.1		1.1		1.3		1.2		1.2		1.3		1.4		1.4		1.4		1.3	b	1.2		1.1		2.9	b	2.8		2.6	

Representativeness of the European social partner organisations: Temporary agency work sector

SI	5.8		5.5		6.0		5.3		5.2		4.7		4.7		5.3		5.2		5.7		5.9		4.7		3.5		4.8	b	5.9		5.0	
SK	0.9		0.7		0.9		1.5	b	2.6		1.4		1.6		1.6		1.3		0.9		2.6		4.6		4.5		4.4	b	5.1		5.6	

^(a) Notes: b, break in time series; bd, break in time series, and definition differs (see metadata); bu, break in time series, and low reliability; d, definition differs (see metadata); u, low reliability. N.D.; no data.

Source: EU-LFS, 'Temporary employment agency workers by sex, age and NACE Rev. 2 activity' (lfsa_qoe_4a6r2).

Table A77: Temporary employment agency workers aged 15–64 (%), by NACE activity, EU-27, 2008–2023

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
All NACE activities	1.9	1.5	1.7	1.8	1.7	1.7	1.7	1.8	1.9	2.1	2.1	2.1	2.6	2.5	2.5	2.4
Agriculture, forestry and fishing					1.3	1.6	1.3	1.5	1.7	2.4	1.6	2.0	1.8	2.0	2.2	2.2
Industry and construction	2.6	2.1	2.5	2.7	2.7	3.0	3.1	3.1	3.3	3.7	3.7	3.6	3.9	3.4	3.4	3.3
Wholesale and retail trade, transport, accommodation and food service activities	1.5	1.3	1.4	1.5	1.4	1.6	1.6	1.7	1.8	2.2	2.2	2.2	2.6	2.5	2.4	2.6
Information and communication, financial and insurance activities, real estate activities, professional, scientific and technical activities and administrative and support service activities	3.5	2.9	2.9	3.0	2.9	2.0	2.0	2.0	2.1	2.3	2.2	2.2	2.9	2.8	3.0	3.0
Public administration, defence, education, human health and social work activities, arts, entertainment and recreation, and activities of extraterritorial organisations and bodies	0.6	0.5	0.6	0.6	0.5	0.5	0.5	0.6	0.6	0.6	0.7	0.8	1.3	1.6	1.6	1.3
Other service activities, activities of households as employers	1.1	:	0.9	1.0	0.8	0.9	0.8	0.9	0.9	1.0	1.3	1.1	2.2	1.7	1.8	1.5

Notes: 2008: there is a break in time series for industry and construction; wholesale and retail trade, transport, accommodation and food service activities; and information and communication, financial and insurance activities, real estate activities, professional, scientific and technical activities and administrative and support service activities. 2012 and 2014: data on agriculture, forestry and fishing are of low reliability. 2021: there is a break in time series for industry and construction; wholesale and retail trade, transport, accommodation and food service activities; and information and communication, financial and insurance activities, real estate activities, professional, scientific and technical activities and administrative and support service activities.

Source: EU-LFS, 'Temporary employment agency workers by sex, age and NACE Rev. 2 activity' (Ifsa_qoe_4a6r2).

Representativeness of the European social partner organisations: Temporary agency work sector

Table A78: Sector-relatedness of all national trade unions organising/representing TAW workers – full data

Member State	TU name	TU abbreviation	Member of UNI Europa Agency Workers	Sector														
				Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	Other sectors
AT	GPA	GPA	True	x	x		x	x		x	x		x	x	x	x	x	x (any white-collar sector)
AT	Production Trade Union	PRO-GE		x	x	x	x (blue-collar workers only)	x	x	x		x	x	x	x	x	x (but not in practice)	x
BE	Algemene Centrale der Liberale Vakbonden van België	ACLVB-CGSLB	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (all in which TAW is used)
BE	ACV-CSC Puls	ACV-CSC Puls	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
BE	ABVV-FGTB Metaal	ABVV-FGTB Metaal	nd		x										x			
BE	ACV-CSC National Federation of White-collar Workers	ACV-CSC CNE	nd	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
BE	ACV-CSC METEA	ACV-CSC METEA	nd		x										x			
BE	ACV-CSC Transcom	ACV-CSC Transcom	nd								x	x		x			x (communication sector)	
BE	ACV-CSC Food and Services	ACV-CSC Food and Services	True					x		x				x	x	x	x	
BE	ACV-CSV Construction, Industry and Energy	ACV-CSC BIE		x											x			x (energy)
BE	ABVV-FGTB Federation of White-collar Workers, Technicians and	ABVV-FGTB BBTK-SETCA	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	

Representativeness of the European social partner organisations: Temporary agency work sector

	Professional and Managerial Staff																	
BE	ABVV-FGTB General Federation	ABVV-FGTB ACCG	True					x	x					x	x			
BE	ABVV-FGTB Horval	ABVV-FGTB Horval	nd						x	x								x (the general hospitality sector)
BE	ABVV-FGTB Belgian Federation for Blue-collar Transport Workers	ABVV-FGTB BTB									x	x		x				x (all sectors related to transportation)
BG	CITUB	CITUB	True															
CY	No union																	
CZ	KOVO Mladá Boleslav	KOVO MB													x			
CZ	KOVO Kvasiny	KOVO KV													x			
CZ	KOVO Vrchlabí	KOVO VL													x			
DE	United Services Trade Union	ver.di	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
DE	Industrial Union of Metalworkers	IG Metall			x										x			
DE	Industrial Union Mining, Chemistry, Energy	IG BCE													x			
DK	HK Privat	HK Privat	True	x	x	x	x	x	x	x	x (not drivers – x applies to administration, human resources, etc.)	x	x	x	x	x	x	x (all sectors; HK Privat organises salaried employees in all sectors)
DK	United Federation of Danish Workers	3F		x					x	x	x	x		x	x			
DK	Danish Association of Masters and PhDs	DM				x	x	x	x				x	x			x	x (public sector, pharmaceutical, information technology, publishing, culture, sports, media, utilities, consulting and advisory, education and training,

Representativeness of the European social partner organisations: Temporary agency work sector

																		transportation, non-governmental organisations, interest groups)
EE	No union																	
EL	No union																	
ES	Mobility, Consumption and Services Federation of the General Union of Workers	FESMC-UGT	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
ES	Services Federation – Workers’ Commissions	CCOO – Servicios	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
ES	Unión y Empleo	N.A.		nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd
FI	Service Union United	PAM	True					x (yes, in the retail and wholesale trade: 1.8 %)										x (security sector, accommodation and food services sector, property management sector)
FI	Union of Private Sector Professionals	ERTO												x				
FI	Industrial Union	Teollisuusliitto			x				x					x	x			x (chemical industry, 330 members; wood products industry, 295 members; other sectors, 281 members)
FR	General Confederation of Labour – Interim	CGT Intérim	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
FR	French Democratic Labour Confederation – Services Federation	FS-CFDT	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
FR	French Confederation of Christian Workers – CSFV	CFTC – CSFV	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
FR	French Managers’ Confederation –	CFE-CGC SNES		x	x	x	x	x	x	x	x	x	x	x	x	x	x	

Representativeness of the European social partner organisations: Temporary agency work sector

	French General Managers' Confederation – Retail and services – Syndicat National de l'Encadrement et des Services																	
FR	Employees and Managers' Federation – General Confederation of Labour – Force Ouvrière (CGT-FO)	FEC FO	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
FR	National Union of Autonomous Trade Unions – Trade and Services Federation	UNSA FCS		x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (all sectors)
HR	No union																	
HU	Confederation of Metal Workers	Vasasok			x										x			
HU	Trade Union of Mine, Energy and Industrial Workers	BDSZ													x			
IE	Services Industrial Professional and Technical Union	SIPTU																No data
IT	New Identities of Work in the Italian General Confederation of Labour	NIDIL CGIL	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (sport sector)
IT	Italian Federation of Commerce, Tourism and Service Workers in the Italian General Confederation of Labour	Filcams CGIL	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
IT	Federation of Self-employed and Atypical Workers in the Italian	FELSA CISL ^(*)	True ^(*)	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (sport sector)

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	Confederation of Workers' Unions																	
IT	Italian Confederation of Tertiary Trade Unions in the Italian Confederation of Workers' Unions	FIST CISL ^(b)	True ^(b)	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
IT	Temporary Autonomous Atypical Workers in the Italian Union of Labour	Uiltemp ^(b)	True ^(b)	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (sport sector)
IT	Italian Union of Tourism Trade Workers	Uiltucs	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
LT	No union																	
LU	Luxembourg Confederation of Independent Trade Unions (Services and Energy)	OGB-L	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (unions cover TAW workers in all sectors but the private security sector)
LU	Luxembourg Confederation of Christian Trade Unions (Services)	LCGB Services		x	x	x	x	x	x	x	x	x	x	x	x	x	x	x unions cover TAW workers in all sectors but the private security sector)
LV	Trade Union of Culture Sector of Latvia	LKDAF	True	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd
MT	General Workers Union	GWU				x				x					x			x (security services, administrative/ clerical services, cleaning services)
MT	UHM Voice of the Workers	UHM				x				x								x (waste management, sea transport (mooring workers, seafarers, security services, cleaning services, administrative/ clerical services)
NL	Federation of Dutch Trade Unions	FNV	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	

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NL	Christian National Trade Union Federation	CNV		nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd
NL	The Union	De Unie	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd
PL	Solidarity (Solidarność)	Solidarność^(b)	True	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd
PT	Democratic Union of Postal, Telecommunications, Media and Services Workers	Sindetelco	True									x		x		x		x (telecommunications, call centres, logistics and private security sectors)
PT	National Trade Union of Telecommunications and Audiovisual Workers	Sinttav	True										x	x		x	x	x (telecommunications, multimedia, communication, information, arts, culture, technology and services sectors)
PT	Trade Union of Service Sector Workers	Sitese	True	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd	nd
RO	No union																	
SE	Unionen	Unionen	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
SE	Swedish Union for Service and Communications Employees	SEKO	True								x	x	x	x				
SE	Swedish Trade Union Confederation	LO		x	x	x		x	x	x		x	x	x	x		x	
SE	Professional Associations in Trade and Services	AHT		x	x	x	x	x	x	x		x	x	x	x	x	x	x (all sectors, white-collar work only)
SE	Swedish Association of Health Professionals	VF				x												
SE	Swedish Teachers' Union	N.A.					x											
SE	Sveriges Ingenjörer	SI	True	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x (all sectors, white-collar work only)
SE	Sveriges Läkareförbund	N.A.				x												

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SI	Free Trade Union of Slovenia	SSS															
SK	Trade Union Federation KOVO	OZ KOVO		x	x									x			

(^a) FELSA CISL is listed as a member of UNI Europa Agency Workers, but this was not confirmed by UNI Europa Agency Workers.

(^b) In Italy, FIRST CISL and Uiltemp are listed as members of UNI Europa Agency Workers by UNI Europa Agency Workers, but this was not confirmed at the national level. In Poland, Solidarność is also listed as a UNI Europa Agency Workers member, but this was not confirmed by Solidarność.

Notes: TU, trade union. TUs highlighted in **green** are those that indicated membership of UNI Europa Agency Workers.

Source: Network of Eurofound Correspondents, 2023.

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Table A79: Membership coverage of trade unions – full details

Member State	TU abbreviation	Member of UNI Europa Agency Workers	TAW workers with short-term contracts	Internal staff of the TWA	If a TAW worker receives a direct permanent contract with the hiring firm, employee needs to join another TU (number of 'yes' responses)	Size of the companies employing organised workers				Geographical coverage	
						1–9	10–49	50–249	> 250	Organising entire country	Regional subdivisions
AT	GPA	True	Yes (in principle) – zero-hour contracts are not allowed	No – internal staff who are white-collar employees are organised by the GPA	This depends on the sector in which the employer company is active. If the activities lie within PRO-GE's realm (e.g. manufacturing), the membership can be maintained. If the activities are in another sector (e.g. transport – covered by Vida), then a solution is found between the two unions	True	True	True	True	True	True
AT	PRO-GE		Yes (in principle) – zero-hour contracts are not allowed	Yes – as long as they are white-collar employees	Most likely – the former TAW employee remains a member as long as the new employment relationship is also a white-collar one	True	True	True	True	True	True
BE	ACLB-CGSLB	True	Yes	Yes	No, as ACLB-CGSLB organises all of its sectors as a confederation	True	True	True	True	True	There are regional structures, but all work under the umbrella of the confederation
BE	ACV-CSC Puls	True	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	Only the Dutch-speaking part	True
BE	ABVV-FGTB Metaal	nd	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	Only the French-speaking part	True

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BE	ACV-CSC CNE	nd	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation
BE	ACV-CSC METEA	nd	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation
BE	ACV-CSC Transcom	nd	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation
BE	ACV-CSC Food and Services	True	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation
BE	ACV-CSC BIE		Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation
BE	ABVV-FGTB BBTK-SETCA	True	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation
BE	ABVV-FGTB ACCG	True	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation

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BE	ABVV-FGTB Horval	nd	Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation
BE	ABVV-FGTB BTB		Yes	Yes	Yes and no, as they become a member of the competent TU federation. However, as all federations have representation within the TAW sector, this is not exactly a conversion	True	True	True	True	True	There are regional structures, but all work under the umbrella of the federation
BG	CITUB	True	na	na	Direct meetings are held with potential members to provide an explanation of the benefits of becoming members of the TU					Yes, except TAW workers	Yes – the TU has regional councils in all 28 districts in the country
CY	No union										
CZ	KOVO MB		No	na	na				True	The geographical distribution depends on the location of the Škoda Auto branches	Yes, there are regional branches, according to company structure
CZ	KOVO KV		No	na	na				True	The geographical distribution depends on the location of the Škoda Auto branches	Yes, there are regional branches, according to company structure
CZ	KOVO VL		No	na	na				True	The geographical distribution depends on the location of the Škoda Auto branches	Yes, there are regional branches, according to company structure

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DE	ver.di	True	No – this is excluded by the collective agreements	Yes	Yes – for example, this would be the case if they were working for a TWA with a company agreement negotiated by ver.di but were assigned to a car producer where IG Metall organises the workers (e.g. Brunel)	True	True	True	True	True	ver.di is organised in state districts that are, in most cases, within the borders of the German federal states, except for the ver.di state districts of Lower Saxony / Bremen; North (Schleswig-Holstein and Mecklenburg-Western Pomerania); Rhineland-Palatinate / Saarland; and Saxony, Saxony-Anhalt and Thuringia
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DE	IG Metall		According to IG Metall, short-term assignments do not happen often but are sometimes the result of a company policy on using TAW for staff acquisition. Sometimes, workers are sent home after one day if they are not regarded as fit for the job. There are no zero-hour contracts, but part-time work plays a role in the sense of capacity-oriented variable working hours. Workers with part-time contracts work 40-hour weeks and then are not sent on assignments to compensate for the overtime. This practice is criticised by IG Metall because the workers affected by it receive wages based on the part-time contract and, during the time of	Yes – in some sector- or company-related TWAs	Mostly no – most TAW workers in manufacturing are already organised by IG Metall	True	True	True	True	True	IG Metall is divided into seven nationwide districts: North Rhine-Westphalia; Central (Hessen, Thuringia, Rhineland-Palatinate, Saarland); Coast (Hamburg, Schleswig-Holstein, Mecklenburg-Western Pomerania); Lower Saxony and Saxony-Anhalt; Berlin, Brandenburg and Saxony; Bavaria; and Baden-Württemberg
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			the contract, cannot work more hours to receive a full-time salary								
DE	IG BCE		na	Yes (in the few TWAs active and specialising in only the chemical sector) – in other large cross-sector TWAs, there are a couple of individual members (mostly with membership before they become staff of the TWA company)	Yes – for example, this would be the case if they were working for a TWA with a company agreement negotiated by ver.di (e.g. Brunel) but were assigned to a producer of chemicals where IG BCE organises the workers	True	True	True	True	True	Yes, IG BCE is organised in eight state districts: Baden-Württemberg, Bavaria, Hessen-Thuringia, North, North-East, North Rhine, Rhineland-Palatinate/Saarland and Westphalia
DK	HK Privat	True	Yes – it covers TAW workers with short-term assignments (e.g. one day), but not zero-hour contracts	Yes – HK Privat traditionally organises clerical employees (administration, human resources, etc.)	No – because the TAW worker will be hired to perform a job that belongs to the same union that sends out the TAW worker and is under the same sectoral agreement	True	True	True	True	True	Local departments are connected to the main organisation (and are in direct contact with headquarters)
DK	3F		Yes	No	No – the TAW worker maintains their membership of the union if the permanent work contract is within the same sector	True	True	True	True	True	3F consists of six national groups, each covering a sector or industry. Regionally, the union has local branches and clubs

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DK	DM		na	na	No – this is defined by the sectoral collective agreement. If the permanent contract is obtained in the same sector, the employee should maintain their membership			True		True	No
EE	No union										
EL	No union										
ES	FESMC-UGT	True	The union organises all types of TAW workers, but the unionisation of workers on very short assignments is 'almost an impossible task', according to the union	Yes – most of the membership is made up of internal staff, with more stable employment conditions	Yes – as long as they continue working in the same sector / union domain	True	True	True	True	True	Yes – the TU has a territorial structure in all Spanish regions (autonomous communities)
ES	CCOO – Servicios	True	The union organises all types of TAW workers, but the unionisation of workers on very short assignments is 'almost an impossible task', according to the union	Yes – most of the membership is made up of internal staff, with more stable employment conditions	Yes – as long as they continue working in the same sector / union domain	True	True	True	True	True	Yes – the TU has a territorial structure in all Spanish regions (autonomous communities)
ES	Unión y Empleo										
FI	PAM	True	Yes	Yes	No, because the TU is sector specific and is thus the TU for workers in the services sector, independent of the form of employment			True		True	Yes – there are structures that are occupational and regional

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FI	ERTO		Presumably, yes	Presumably, yes	No, because the TU is sector specific and is thus the TU for workers in the industry sector, independent of the form of employment	True	True	True	True	True	Yes – there are substructures that are occupational and regional. TAW workers are organised through the occupational substructure of ETRY
FI	Teollisuusliitto		Yes	No	No, because the TU is sector specific and is thus the TU for workers in the industry sector, independent of the form of employment	True	True	True	True	True	Yes – there are substructures that are occupational and regional. TAW workers are organised through the occupational substructure of ETRY
FR	CGT Intérim	True	Yes	Yes	Yes	True	True	True	True	True	No
FR	FS-CFDT	True	Yes	Yes	A TAW worker who is hired to fill a permanent position in their hiring company joins the TU federation that covers the company's activities	True	True	True	True	True	True
FR	CFTC – CSFV	True	Yes	Yes	A TAW worker who is hired to fill a permanent position in their hiring company joins the TU federation that covers the company's activities	True	True	True	True	True	Yes in a few regions (Aquitaine, Occitania, Réunion)
FR	CFC-CGC SNES		Yes	Yes	A TAW worker who is hired to fill a permanent position in their hiring company joins the TU federation that covers the company's activities	True	True	True	True	True	No
FR	FEC FO	True	Yes	Yes	A TAW worker who is hired to fill a permanent position in their hiring company joins the TU federation that covers the company's activities	True	True	True	True	True	Yes – through FO Service at the departmental level (in about 30 departments)

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FR	UNSA FCS		Yes	Yes	A TAW worker who is hired to fill a permanent position in their hiring company joins the TU federation that covers the company's activities	True	True	True	True	True	No
HR	No union										
HU	Vasasok		No – it is not characteristic of this field. Part-time workers are more common	No	No – at the level of the workplace, the union that organises TAW workers continues to organise them when they are permanent employees			True	True	True	True
HU	BDSZ		No – however, it is typical for the farming sector's TAW workers	Yes (but not typical)	No				True	True	No
IE	SIPTU									True	SIPTU underwent a major reorganisation process, which was completed in 2010. This saw the TU move to organisation on an industrial sector basis rather than a regional basis
IT	NIDIL CGIL	True	Yes	N.A.	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time	True	True	True	True	True	Yes – in addition to its national structure, NIDIL CGIL has regional substructures and sections within the Chamber of Labour that coincide with the provinces

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IT	Filcams CGIL	True	No	Yes – this union is more related to directly employed labour agency workers and not TAW workers	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and, in compliance with the constitutional principle of freedom of association, workers can choose to join or leave a union at any time					True	Yes – in addition to its national structure, Filcams CGIL has regional substructures and sections within the Chamber of Labour that coincide with the provinces
IT	FELSA CISL	True	Yes	na	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time					True	Yes – in addition to its national structure, FELSA CISL has regional substructures and sections within the Chamber of Labour that coincide with the provinces
IT	FIST CISL	True	No	Yes – this union is more related to directly employed labour agency workers and not TAW workers	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time					True	Yes – in addition to its national structure, FIRST CISL has regional substructures and sections within the Chamber of Labour that coincide with the provinces

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IT	Uiltemp	True	Yes	na	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time					True	Yes – in addition to its national structure, Uiltemp has regional substructures and sections within the Chamber of Labour that coincide with the provinces
IT	Uiltucs	True	No	Yes – this union is more related to directly employed labour agency workers and not TAW workers	No – the conversion of a former TAW worker to an employee with a permanent work contract does not necessarily mean that the worker's TU membership changes. The choice of TU membership remains with the worker and is not affected by the type of employment contract they hold. TU membership is a personal choice, and workers can choose to join or leave a union at any time					True	Yes – in addition to its national structure, Uiltucs has regional substructures and sections within the Chamber of Labour that coincide with the provinces
LT	No union										
LU	OGB-L	True	No	No	No – the worker can continue to be a member of the same TU	True	True	True	True	True	No
LU	LCGB Services		No	No	No – the worker can continue to be a member of the same TU	True	True	True	True	True	No
LV	LKDAF	True	Not relevant, as it has no members	Not relevant, as it has no members	Not relevant, as it has no members					True	
MT	GWU		No	No	If the TAW worker is directly employed by the hiring company, a change in membership may occur if another TU is representative at the new company. However, this is unlikely, since only two TUs represent TAW workers, and the majority of TAW workers are represented by the GWU		True	True	True	True	No

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MT	UHM		No	No	If the TAW worker is directly employed by the hiring company, a change in membership may occur if another TU is representative at the new company. However, this is unlikely, since only two TUs represent TAW workers, and the majority of TAW workers are represented by the GWU			True	True	True	No
NL	FNV	True	Yes – most are in phase A (zero-hour contracts)	Yes, but not actively since it proves impossible to negotiate a collective bargaining agreement for this group; it is more a case of individual advocacy	No – they move to a different sector within FNV		True	True	True	True	
NL	CNV		Did not want to say (probably yes)	Did not want to say (probably yes)	Did not want to say (assumption is that they will become part of a different section of this TU)		True	True	True	True	No
NL	De Unie		Refused to cooperate	Refused to cooperate	Refused to cooperate					True	
PL	Solidarność	True								True	True
PT	Sindetelco	True	No information obtained	Yes	Not automatically. The workers in the sectors within Sindetelco's domain (postal services, logistics, telecommunications, media, graphics, call centres, temporary work and private security) can continue their membership. Although these sectors are named in the union's statutes, Sindetelco's domain also covers, in principle, other services. Therefore, it seems to be highly improbable that a member would be obliged to leave the union after the conversion of their job	True	True	True	True	True	Sindetelco's statutes stipulate that the union has four regional delegations in mainland Portugal with their own assemblies and elected regional boards

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PT	Sinttav	True	It is theoretically possible, because the statutes allow it, but rarely possible in practice because organising requires time and normally cannot be done in short periods of a few days	Yes	Not automatically. The workers in the sectors within Sinttav's domain (telecommunications, multimedia, audiovisual, communication, information, arts, culture, technology and services) can continue their membership. Although these sectors are named in the union's statutes, Sinttav's domain also covers, in principle, other services. Therefore, it seems to be highly improbable that a member would be obliged to leave the union after the conversion of their job	True	True	True	True	True	No
PT	Sitese	True	No information obtained	No information obtained	No information obtained					True	Sitese has four delegations in mainland Portugal. These delegations do not have political autonomy
RO	No union										
SE	Unionen	True	Not really, because these contracts are exceedingly rare in Sweden. The norm is full-time contracts, with a salary paid between assignments. Some student members can have one-day contracts	Yes	No. One exception is when workers are assigned to the public sector. Unionen only organises private sector workers, and, if someone is offered a job in a public sector workplace, they would need to switch unions	True	True	True	True	True	True

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SE	SEKO	True	Yes	No	No – they remain members of their previous union. Membership is mainly tied to sector	True	True	True	True	True	Yes – the union has regional substructures: SEKO North Norrland, SEKO Middle Norrland, SEKO Gävle-Dala, SEKO Stockholm, SEKO Central Sweden, SEKO Western Sweden, SEKO South, SEKO West, SEKO Skåne, and also SEKO Sjöfolk (maritime workers)
SE	LO		Yes	In general, no, under the assumption that most internal staff are white-collar employees	No – member TUs are sectoral. If workers are offered a contract at the company to which they were assigned, this should mean that they were already a member of the TU for the type of employment	True	True	True	True	True	Yes – it has regional substructures for organisational purposes. There are 10 regional offices in total, covering the entire country
SE	AHT		Yes	Yes	No – they remain a member of the same union as before	True	True	True	True	True	Yes – there are regional substructures for each member union. They organise locally with the union clubs and together cover the entire country

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SE	VF		Yes	Yes	No – they remain a member of the same union as before	True	True	True	True	True	Yes – there are regional substructures for each member union. They organise locally with the union clubs and together cover the entire country
SE	Swedish Teachers' Union		Yes	Yes	No – they remain a member of the same union as before	True	True	True	True	True	Yes – there are regional substructures for each member union. They organise locally with the union clubs and together cover the entire country
SE	Sveriges Ingenjörer	True	Yes	Yes	No – they remain a member of the same union as before	True	True	True	True	True	Yes – there are regional substructures for each member union. They organise locally with the union clubs and together cover the entire country

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SE	Sveriges Läkareförbund		Yes	Yes	No – they remain a member of the same union as before	True	True	True	True	True	Yes – there are regional substructures for each member union. They organise locally with the union clubs and together cover the entire country
SI	SSS		n.a. (very-short-term assignments are not common)	No	Yes – as stated above, the TU active in the sector that organises many TAW workers reports that it recruits TAW workers to join unions, as the workers often become permanent employees of the company they work at after a certain period					True	
SK	OZ KOVO		No	No	No – their membership continues		True	True	True	True	Yes, OZ KOVO has methodological workplaces with professional employees and also political regional structures

Notes: ETRY, Erityistoimihenkilöt ET ry; TU, trade union. TUs highlighted in **green** are those that indicated membership of UNI Europa Agency Workers.

Source: Network of Eurofound Correspondents, 2023.

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Table A80: Position of national TAW trade unions in the national industrial relations landscape

Member State	TU name	TU abbreviation	Member of UNI Europa Agency Workers	Recognised as representative at the national level		Involved in bipartite/tripartite social dialogue bodies	Consulted by government	Collective bargaining level		Involved in industrial action for the sector in the past three years	Affiliation at the national level
				Yes/no	Based on			Sector	Company		
AT	GPA	GPA	True	Yes	Both mutual recognition and a legal right to collective bargaining	No information provided	Yes – there is a more general collective agreement for white-collar workers in crafts, trades and services that covers many subsectors, including the TAW sector. Thus, the TU is involved in collective bargaining for all TAW sectors in which white-collar workers are employed	Yes – there is a more general collective agreement for white-collar workers in crafts, trades and services that covers many subsectors, including the TAW sector. Thus, the TU is involved in collective bargaining for all TAW sectors in which white-collar workers are employed	No	No	ÖGB
AT	Production Trade Union	PRO-GE		Yes	Both mutual recognition and a legal right to collective bargaining	Yes – there are frequent talks with the employer side	Yes (not specified whether ad hoc or regularly by union representative)	Yes – basically all sectors in which blue-collar TAW workers are employed	No	Yes (e.g. legal enforcement of longer notice periods; unions fought for this)	ÖGB

Representativeness of the European social partner organisations: Temporary agency work sector

BE	Algemene Centrale der Liberale Vakbonden van België	ACLVB-CGSLB	True	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ACLVB-CGSLB
BE	ACV-CSC Puls	ACV-CSC Puls	True	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Yes, ACV-CSC Puls is responsible for staff (present in Adecco, Manpower and Randstad)	No clear examples	ACV-CSC
BE	ABVV-FGTB Metaal	ABVV-FGTB Metaal	nd	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ABVV-FGTB
BE	ACV-CSC National Federation of White-collar Workers	ACV-CSC CNE	nd	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ACV-CSC
BE	ACV-CSC METEA	ACV-CSC METEA	nd	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ACV-CSC
BE	ACV-CSC Transcom	ACV-CSC Transcom	nd	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ACV-CSC
BE	ACV-CSC Food and Services	ACV-CSC Food and Services	True	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples for TAW specifically	ACV-CSC
BE	ACV-CSV Construction, Industry and Energy	ACV-CSC BIE		Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ACV-CSC
BE	ABVV-FGTB Federation of White-collar Workers, Technicians and Professional and Managerial Staff	ABVV-FGTB BBTK-SETCA	True	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ABVV-FGTB
BE	ABVV-FGTB General Federation	ABVV-FGTB ACCG	True	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ABVV-FGTB

Representativeness of the European social partner organisations: Temporary agency work sector

BE	ABVV-FGTB Horval	ABVV-FGTB Horval	nd	Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	No data
BE	ABVV-FGTB Belgian Federation for Blue-collar Transport Workers	ABVV-FGTB BTB		Yes	Both	Yes – joint committees and sectoral funds	Yes, regularly	Yes	Unknown	No clear examples	ABVV-FGTB
BG	CITUB	CITUB	True	Yes	Fulfilment of legal requirements	No	No	No	No	Not applicable	CITUB is a cross-industry national TU
CY	No union										
CZ	KOVO Mladá Boleslav	KOVO MB		No	N.A.	No	N.A.	N.A.	N.A.	N.A.	N.A.
CZ	KOVO Kvasiny	KOVO KV		No	N.A.	No	N.A.	N.A.	N.A.	N.A.	N.A.
CZ	KOVO Vrchlabí	KOVO VL		No	N.A.	No	N.A.	N.A.	N.A.	N.A.	N.A.
DE	United Services Trade Union	ver.di	True	Yes	Mutual recognition	Not applicable to Germany	Yes, ad hoc	Yes – via the collective bargaining community of the DGB (all sectors) and when ver.di negotiates company-level agreements for TWAs that assign workers to other sectors	Yes – for example, at the TWA Brunel, ver.di organises both groups of workers	In the last collective bargaining round in December 2022, all unions of the DGB collective bargaining community organised a demonstration in Berlin, including ver.di members; there have been no strikes organised by Ver.di in the TAW sector recently	DGB

Representativeness of the European social partner organisations: Temporary agency work sector

DE	Industrial Union of Metalworkers	IG Metall		Yes	Mutual recognition	Not applicable to Germany	Yes, ad hoc		Yes – for example, IG Metall negotiates a joint company-level agreement with a number of service providers that are subsidiary companies of the car producer Volkswagen AG. The agreement is valid for Autostadt GmbH, the Wolfsburg AG and the employees of Volkswagen Group Services GmbH and Autovision. The last two companies are TWAs	Example: in March 2023, IG Metall organised a warning strike of employees of Volkswagen TWA Autovision, with 2 000 participating workers according to IG Metall	DGB
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Representativeness of the European social partner organisations: Temporary agency work sector

DE	Industrial Union Mining, Chemistry, Energy	IG BCE		Yes	Mutual recognition	Not applicable to Germany	Yes, ad hoc	Yes – via the collective bargaining community of the DGB. In addition, IG BCE negotiates supplementary agreements for TAW workers in the chemical, rubber, plastics, paper and potash and rock salt industries	Yes	Yes – for example, IG BCE participated in a joint action of the DGB collective bargaining community in December 2022 in Berlin	DGB
DK	HK Private HK Privat	HK Private HK Privat	True	Yes	Mutual recognition	Yes – at the EU level via UNI Europa	Yes, ad hoc	Yes – in principle, in all sectors where HK Privat organises salaried employees (i.e. officials; French, <i>Fonctionnaire</i> ; German, <i>Amtlich</i>)	Both categories	No	FH

Representativeness of the European social partner organisations: Temporary agency work sector

DK	United Federation of Danish Workers	3F		Yes	Mutual recognition	Yes – through collective bargaining	No	Yes – 3F holds two TAW collective agreements, negotiated by the Transport Group. Many TAW employees work under the sectoral agreement, valid for the hiring company. This essentially covers all of 3F's sectors: industry, the green sector, private services, hotels and restaurants, construction, the public sector and the Transport Group	na	3F could not provide an answer	FH
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Representativeness of the European social partner organisations: Temporary agency work sector

DK	Danish Association of Masters and PhDs	DM		Yes	Mutual recognition	No	No	No	No	No – however, DM is currently taking legal action in various cases, as members of DM are hired on the collective agreement of the hiring company, although this collective agreement does not cover the work conducted by the TAW workers	Danish Confederation of Professional Associations
EE	No union										
EL	No union										

Representativeness of the European social partner organisations: Temporary agency work sector

ES	Mobility, Consumption and Services Federation of the General Union of Workers	FESMC-UGT	True	Yes – UGT is recognised as a representative union organisation at the national level, since it represents more than 10 % of the total workers	Legal requirements	Yes, it is involved in the TWA-specific group in the National Commission for Health and Safety at Work		The federation is only involved in collective bargaining in private services (retail, hostelry, telecommunications, mass media, culture, sports, administrative offices, insurance activities, cleaning services, transport and security)	Yes – it is involved in company-level bargaining, which covers both internal staff and workers on assignment in some aspects		UGT
ES	Services Federation – Workers' Commissions	CCOO – Servicios	True	Yes – currently, the TU represents around 20 % of the total workers	Legal requirements	Yes	Yes – regularly, but indirectly through peak-level representatives directly involved in social dialogue	Yes – the union is involved in TWA sector- and company-level bargaining, which also apply to all TAW workers on assignment in some aspects	Yes – it is involved in company-level bargaining, which covers both internal staff and workers on assignment in some aspects	No	CCOO

Representativeness of the European social partner organisations: Temporary agency work sector

ES	Unión y Empleo	The organisation explicitly declined to participate in the research		N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
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Representativeness of the European social partner organisations: Temporary agency work sector

FI	Service Union United	PAM	True	Depends on how the sector is defined. The TU represents all of its members (TAW workers included) and the collective bargaining agreements negotiated by the TU also cover the TAW sector. This is the case for all TUs that have TAW workers as members. At the same time, it does not represent the interests of only TAW workers in negotiations	Yes, by mutual recognition, if it is considered representative	No	Yes, ad hoc	Depends on how the sector is defined. No, in that it does not negotiate collective agreements especially for TAW workers. However, the TU is involved in collective bargaining for all service sectors that employ TAW workers	No	No	SAK
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Representativeness of the European social partner organisations: Temporary agency work sector

FI	Union of Private Sector Professionals	ERTO		Yes	Mutual recognition	Yes, presumably – it is at least consulted on matters concerning TAW (no data on specific bodies)	Ad hoc, presumably	Yes, presumably / but only for white-collar TAW, meaning office work (business administration / ICT, etc.) – but presumably in all sectors	No data	No data	STTK
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Representativeness of the European social partner organisations: Temporary agency work sector

FI	Industrial Union	Teollisuusliitto		Yes	Mutual recognition	No	No	No – in that it does not negotiate collective agreements especially for TAW workers. It can, however, include measures concerning TAW in its collective bargaining – for instance, by including entries in about the working conditions of TAW workers. In addition, the TU is involved in collective bargaining for all industry sectors that employ TAW workers	No	No	SAK
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Representativeness of the European social partner organisations: Temporary agency work sector

FR	General Confederation of Labour – Interim	CGT Intérim	True	Yes	Fulfilment of legal requirements	Yes	Ad hoc	No	Yes – it covers both the internal staff (administration, human resources, etc.) of the TWA and TAW workers on assignment	The TU fought against the pension reform adopted in 2023. The union took numerous actions at the company level, including actions to defend temporary workers who had been penalised by their employers, to demand pay rises or to denounce discrimination. The union has also taken action to hold Adecco's management to account after staff data were hacked, leading to fraudulent withdrawals from employees' bank accounts	CGT
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Representativeness of the European social partner organisations: Temporary agency work sector

FR	French Democratic Labour Confederation – Services Federation	FS-CFDT	True	Yes	Fulfilment of legal requirements	Yes	Ad hoc	No – only in some sectors: retail, accommodation, restaurants, tourism, cleaning, childminding, personal services, prevention/safety, movements and associations, legal professions, real estate, the textile and leather industry and consular chambers (chambers of commerce and industry, chambers of trade and crafts)	Yes – it covers both the internal staff (administration, human resources, etc.) of the TWA and TAW workers on assignment	Not relevant	CFDT
FR	French Confederation of Christian Workers – CSFV	CFTC – CSFV	True	Yes	Fulfilment of legal requirements	Yes	Ad hoc	No – only in 102 branches in which the TU takes part in branch-level collective bargaining	Yes – it covers both the internal staff (administration, human resources, etc.) of the TWA and TAW workers on assignment	No answer from the TU	CFTC

Representativeness of the European social partner organisations: Temporary agency work sector

FR	French Managers' Confederation – French General Managers' Confederation – Retail and services – Syndicat National de l'Encadrement et des Services	CFE-CGC SNES		Yes	Fulfilment of legal requirements	Yes	Ad hoc	No	Yes – it covers both the internal staff (administration, human resources, etc.) of the TWA and TAW workers on assignment	No	CFE-CGC
FR	Employees and Managers' Federation – General Confederation of Labour – Force Ouvrière (CGT-FO)	FEC FO	True	Yes	Fulfilment of legal requirements	Yes	Ad hoc	No – only in the sectors covered by FEC FO: insurance, banking, casinos and gaming, shipping companies and sedentary staff, notaries and clerks, retail, agricultural organisations, social security organisations, press, publishing, advertising and services	Yes – it covers both the internal staff (administration, human resources, etc.) of the TWA and TAW workers on assignment	It is difficult to take industrial action at the national level. In the case of pension reform, TAW workers took part in demonstrations at the local level, distributed leaflets, welcomed and shared information with new temporary workers and held information sessions in TWAs	CGT-FO

Representativeness of the European social partner organisations: Temporary agency work sector

FR	National Union of Autonomous Trade Unions – Trade and Services Federation	UNSA FCS		Yes	Fulfilment of legal requirements	Yes	No	No	Yes – it covers both the internal staff (administration, human resources, etc.) of the TWA and TAW workers on assignment	Yes – for instance, to mark the 30th anniversary of FASTT, UNSA organised a competitive question game with the aim of explaining FASTT's missions and the services FASTT can provide to TAW workers, while at the same time increasing UNSA FCS's visibility to facilitate recruitment	UNSA
HR	No union										
HU	Confederation of Metal Workers	Vasasok		No	N.A.	No	No	No	No	No	MASZSZ
HU	Trade Union of Mine, Energy and Industrial Workers	BDSZ		No	N.A.	No	No	No	No	It is not typical, but TAW workers doubtless took part in the mobilisation in the common interest of all employees	MASZSZ

Representativeness of the European social partner organisations: Temporary agency work sector

IE	Services Industrial Professional and Technical Union	SIPTU		No data	No data	No data	No data	No data	No data	No data	No data
IT	New Identities of Work in the Italian General Confederation of Labour	NIDIL CGIL	True	Yes	Mutual recognition	Yes (based on the interview with Assolavoro)	Ad hoc	Yes – there are no limitations on the sectors in which the national collective bargaining agreement applies to TAW workers	No data	Yes – one example is the TAW strike on 21 December 2022, in which the three main trade unions protested against potential job cuts in some essential services	CGIL
IT	Italian Federation of Commerce, Tourism and Service Workers in the Italian General Confederation of Labour	Filcams CGIL	True	Yes	Mutual recognition	No data	No data	No data ^(a)	Yes	Yes – an example is the strike of 27 March 2023 concerning the sale of a company employing TAW workers	CGIL
IT	Federation of Self-employed and Atypical Workers in the Italian Confederation of Workers' Unions	FELSA CISL	True	Yes	Mutual recognition	Yes (based on the interview with Assolavoro)	Yes, ad hoc	Yes – there are no limitations on the sectors to which the national collective bargaining agreement applies to TAW workers	No data	Yes – an example is the strike of 9 March 2022 by TAW workers employed in the police headquarters and prefectures	CISL

Representativeness of the European social partner organisations: Temporary agency work sector

IT	Italian Confederation of Tertiary Trade Unions in the Italian Confederation of Workers' Unions	FIST CISL	True	Yes	Mutual recognition	No data	No data	No data ^(a)	No data	Yes – an example is the strike of 27 March 2023 concerning the sale of a company employing TAW workers	CISL
IT	Temporary Autonomous Atypical Workers in the Italian Union of Labour	Uiltemp	True	Yes	Mutual recognition	Yes (based on the interview with Assolavoro)	Ad hoc	Yes	No data	Yes – an example is the strike of 2 May 2022 regarding private surveillance and security services	UIL
IT	Italian Union of Tourism Trade Workers	Uiltucs	True	Yes	Mutual recognition	No data	No	No data ^(a)	No data	Yes – an example is the strike of 2 May 2022 regarding private surveillance and security services	UIL
LT	No union										
LU	Luxembourg Confederation of Independent Trade Unions (Services and Energy)	OGB-L	True	Yes	Fulfilment of legal requirements	Yes – Comité permanent du travail et de l'emploi	No	Yes (MEB)	No	No	OGB-L
LU	Luxembourg Confederation of Christian Trade Unions (Services)	LCGB Services		Yes	Fulfilment of legal requirements	Yes – Comité permanent du travail et de l'emploi	No	Yes (MEB)	No	No	LCGB
LV	Trade Union of Culture Sector of Latvia	LKDAF	True	No	No	No	No	No	No	Not relevant, as it has no members	Free Trade Union Confederation of Latvia

Representativeness of the European social partner organisations: Temporary agency work sector

MT	General Workers Union	GWU		Not applicable, since TAW is not recognised as a sector in its own right, but rather found in various other sectors, and collective bargaining occurs at the enterprise level. That being said, the GWU is recognised as a representative TU in relation to the TAWss it represents	Legal requirements: Recognition of Trade Unions Regulations (Subsidiary Legislation 452.112)	No		Yes, ad hoc	No – the TU is involved in collective bargaining in the following sectors with TAW workers: human health / hospitals (private and public), food and drink, manufacturing, security services, administrative / clerical services and cleaning services	Yes – in the majority of cases, the categories covered are TAW workers on assignment. If both categories of workers are covered, then separate collective agreements are negotiated	Yes – industrial action mainly took place in the human health / hospitals sector.	Not applicable
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Representativeness of the European social partner organisations: Temporary agency work sector

MT	UHM Voice of the Workers	UHM		Not applicable, since TAW is not recognised as a sector in its own right, but rather found in various other sectors, as outlined in 3.10, and collective bargaining occurs at the enterprise level. That being said, the GWU is recognised as a representative TU in relation to the TWAs it represents	Legal requirements: Recognition of Trade Unions Regulations (Subsidiary Legislation 452.112)	No	Yes, ad hoc	No – the TU is involved in collective bargaining in the following sectors: human health / hospitals, food and drink, waste management, sea transport, security services, cleaning services, administrative /clerical services and professionals	Yes – in general, only the TAW workers on assignment are covered	Yes – UHM has been rather outspoken and taken action on several injustices in the last few years: salary breaches prompted UHM to seek intervention by the Department for Industrial and Employment Relations (2021); Wasteserv salary issues continued (2020); a union boss suggested creating a wage protection fund for workers not paid their wages (2018); Minister José Herrera agreed to put Wasteserv employees on indefinite contracts	Not applicable
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Representativeness of the European social partner organisations: Temporary agency work sector

										(2017); and the Gozo Channel workers lamented the preferential treatment given to Nikolaos employees (2020). Other actions in relation to TAW occurred in previous years, including UHM ordering further industrial action against Gozo Channel ferries (2018)	
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Representativeness of the European social partner organisations: Temporary agency work sector

NL	Federation of Dutch Trade Unions	FNV	True	Yes	Legal	Yes – collective bargaining consultations (including on the Social Fund and foundations funded through it); Stichting van de Arbeid (bipartite) consultation; consultations with the Ministry of Social Affairs and Employment regarding specific regulations on temporary work, and flexible general and labour migration	Structural	In addition to the collective bargaining agreements for TAW, the FNV is involved in all (800) negotiated agreements on aspects of non-permanent contracts	In general, only TAW workers on assignment are covered	Yes – at specific hiring companies, such as PostNL, in collective bargaining negotiations and employer congresses, actions were organised targeting talks with parliament, particularly members of the Social Affairs and Employment Commission. These actions included a social media campaign aimed at the Minister of Social Affairs and Employment	FNV is a cross-industry national TU
NL	Christian National Trade Union Federation	CNV		Yes	Mutual recognition	Refusal to share data	Refusal to share data	Refusal to share data	Refusal to share data	N.A.	N.A.
NL	The Union	De Unie	nd	Yes		Refusal to cooperate	Refusal to cooperate	Yes (expert assessment)	Not very common (expert assessment)	N.A.	N.A.

Representativeness of the European social partner organisations: Temporary agency work sector

PL	Solidarity (Solidarność)	Solidarność ^(b)	True	No data	No data	No data	No data	No data	No data	No data	No data
PT	Democratic Union of Postal, Telecommunications, Media and Services Workers	Sindetelco	True	Yes	Mutual recognition	No social dialogue bodies	Information not obtained	No	No	It called for a strike in NACE 78.2 in 2018	UGT
PT	National Trade Union of Telecommunications and Audiovisual Workers	Sinttav	True	Yes	Mutual recognition	No social dialogue bodies	Information not obtained	No	No collective bargaining agreement concluded, but in 2022 Sinttav submitted a proposal for a single employer agreement to Intelcia, a large company in NACE 78.2	It called for strikes in 2018, 2019, 2021 and 2023	CGTP
PT	Trade Union of Service Sector Workers	Sitese	True	Yes	Mutual recognition	No social dialogue bodies	Information not obtained	Yes – in 1989, Sitese co-signed, as the leading TU of Fetese, the MEB agreement with APETT (now Apespe RH). Today, this agreement still applies to a significant number of TAW workers	No	No indications of Sitese's activity with/for TAW workers were found	UHT
RO	No union										

Representativeness of the European social partner organisations: Temporary agency work sector

SE	Unionen	Unionen	True	Yes	Mutual recognition	No social dialogue bodies	Regularly	Yes, all sectors (white-collar private sector work only)	No	No	TCO
SE	Swedish Union for Service and Communications Employees	SEKO	True	Yes	Mutual recognition	No social dialogue bodies	Regularly, but all unions are able to respond to government consultations on matters that they deem relevant	No – it does not negotiate for TAW workers. It is part of LO, which negotiates the agreement for all its members	No	No	LO
SE	Swedish Trade Union Confederation	LO		Yes	Mutual recognition	No social dialogue bodies	Yes, regularly	Yes – in all sectors (for blue-collar workers)	No	No	LO is a peak-level organisation
SE	Professional Associations in Trade and Services	AHT		Yes	Mutual recognition	No social dialogue bodies	Yes, regularly	Yes – it negotiates the overarching white-collar agreement for TAW workers	No	No	SACO
SE	Swedish Association of Health Professionals	VF		Yes	Mutual recognition	No social dialogue bodies	Yes, regularly	No – only for healthcare workers. It represents four occupations: nurses, midwives, biomedical scientists and radiographers	No	No	SACO
SE	Swedish Teachers' Union	N.A.		Yes	Mutual recognition	No social dialogue bodies	Yes, regularly	No – only education	No	No	SACO

Representativeness of the European social partner organisations: Temporary agency work sector

SE	Sveriges Ingenjörer	SI	True	Yes	Mutual recognition	No social dialogue bodies	Yes, regularly	Yes – it negotiates the overarching white-collar agreement for TAW workers	No	No	SACO
SE	Sveriges Läkarförbund			Yes	Mutual recognition	No social dialogue bodies	No social dialogue bodies	No – only for doctors	No	No data	SACO
SI	Free trade union of Slovenia	SSS		No, however, SSS is member of ZSSS (Association of Free Trade Unions of Slovenia) which is a recognised representative trade union association on the national level.	N.A.	no	no. Not the TU itself, but the association it belongs to - ZSSS is consulted regularly.	no	no	no	ZSSS – Association of Free Trade Unions of Slovenia
SK	Trade Union Federation KOVO	OZ KOVO		No, in Slovakia there are no trade unions specifically for agency employees.	N.A.	no	no	No, but collective bargaining in other sectors of the economy	no	no	Confederation of Trade Unions of the Slovak Republic (KOZ)

Notes: CCOO, Workers' Commissions (Comisiones Obreras); CFDT, French Democratic Confederation of Labour (Confédération Française démocratique du Travail); CFE-CGC, French Managers' Confederation – French General Managers' Confederation (Confédération française de l'encadrement – Confédération générale des cadres); CFTC, French Christian Workers' Confederation (Confédération des Travailleurs Chrétiens); CGT, General Confederation of Labour (Confédération générale du travail); FH, Danish Trade Union Confederation (Fagbevægelsens Hovedorganisation); ÖGB, Austrian Trade Union Federation; SAK, Central Organisation of Finnish Trade Unions (Suomen Ammattiliittojen Keskusjärjestö); STTK, Finnish Confederation of Professionals (Toimihenkilökeskusjärjestö); TU, trade union; UNSA, National Union of Autonomous Trade Unions (Union nationale des syndicats autonomes). ^(a) According to the representative of RSA Manpower Filcams CGIL, all trade unions in Italy engage in collective bargaining at the company level. However, this was not confirmed by the representatives; hence, 'no data' is given, as this was indicated by the members of the Network of Eurofound Correspondents from Italy.

Representativeness of the European social partner organisations: Temporary agency work sector

Table A81: Sector-relatedness of all employer organisations and business associations representing the employers in TAW / TWAs – full data

Member State	EO/BA name	EO/BA abbreviation	Member of WEC-Europe	Organising entire country	Sector														Other sectors
					Construction	Metal	Human health / hospitals	Education	Commerce	Agriculture	Food and drink	Road transport	Courier services	Public services	Private services	Manufacturing	Audiovisual	Live performance	
AT ^(a)	Verband Österreichs Personaldienstleister	ÖPDL	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x		Yes
AT	Association of the Commercial Service Providers	FVGD	False	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	Yes
BE	Federgon	Federgon	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	Yes – all sectors that involve TAW
BE	Union of Belgian Enterprises	VBO-FEB	False	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	Yes – all sectors that involve TAW
BG	Национална конфедерация по заетостта – България	HK3B	True	Entire country	x	x	x		x		x		x	x	x	x	x		
BG	Bulgarian Employment Confederation	BEC	False	No			x		x				x			x			
CY	No organisation																		
CZ	Association of Personal Service Providers	APPS	False	Entire country	x	x						x				x			
CZ	Association of Working Agencies	APA	False	Entire country	x	x				x		x				x			Yes, Retail
DE	Bundesarbeitgeberverband der Personaldienstleister	BAP	True	Entire country		x	x		x		x	x		x		x			Yes – logistics; the chemical industry; the printing industry; railways; the paper-, cardboard- and plastic-processing industry; the textile and clothing industry; the wood- and plastic-processing industry; potash and rock salt mining; and the rubber industry. There are only two sectors in which TAW is banned: the main construction

Representativeness of the European social partner organisations: Temporary agency work sector

																		trade (but it is permitted in the ancillary building trade) and the slaughter and cutting of meat (from 1 April 2024, TAW will no longer be permitted in the meat-processing sector)
DE	Association of German Temporary Employment Agencies	IGZ	False	Entire country	x	x	x	x					x	x	x			Yes – the chemical industry; the printing industry; the wood- and plastic-processing industry; the rubber industry; railways; the textile and clothing industry; public administration; banks and insurance; electricity supply, information technology and telecommunications; and the paper-, cardboard- and plastic-processing industry
DK	Dansk Erhverv	None	True	Entire country	x	x	x	x		x	x	x	x	x		x	x	
DK	Dansk Industri	DI	False	Entire country	x	x		x	x	x	x	x	x	x	x			
DK	Federation of Staffing Agencies in Denmark	VB	False ⁽⁴⁹⁾	Entire country	x	x		x	x		x	x	x	x	x		x	x
EE	Eesti Personaliettevõtete Liit	EPREL	True	Entire country				x		x			x	x	x			Yes – ICC, finance, etc.
EL	Ένωση Ιδιωτικών Εταιρειών Απασχόλησης	Ενιδεα	True	Entire country														Yes – most probably all industries
ES	Asociación de Agencias de Empleo y Empresas de Trabajo Temporal	Asempleo	True	Entire country	x	x			x	x	x	x			x	x	x	Yes
FI	Henkilöstöala HELA ry	HELA	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	Yes – almost all sectors
FI	Palvelualojen työnantajat PALTA ry	PALTA	False	Entire country	x	x			x			x	x		x	x		
FR	Prism'emploi	Prism'emploi	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	Yes – all sectors
HR	Hrvatska udruga poslodavaca, Koordinacija za agencije za	HUP	False	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	Yes – real estate activities and

⁽⁴⁹⁾ The VB is not counted as a WEC-Europe member in this study despite its indirect membership through Dansk Erhverv, to which this employer organisation is affiliated at the national level. Organisations have to be members of Dansk Erhverv to become members of the federation. The two organisations are highly integrated.

Representativeness of the European social partner organisations: Temporary agency work sector

	privremeno zapošljavanje i posredovanje pri zapošljavanju																		professional, scientific and technical activities
HU	Magyar Munkaerő-kölcsönzők Országos Szövetsége	MMOSZ	False	Entire country	x	x	x	x	x	x	x	x	x	x		x			
HU	Magyarországi Diákállalkozások Országos Érdekképviselői Szövetsége	Diákész	False	Entire country		x			x	x	x		x	x		x			Yes – the administrative support sector and entertainment (films)
IE	Employment and Recruitment Federation	ERF	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
IT	Associazione Nazionale di Categoria delle Agenzie per il Lavoro	Assolavoro	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	There are no sectors where there is a general ban on the use of labour supply at the national level
IT	Associazione Italiana delle Agenzie per il Lavoro	Assosomm	False	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	There are no sectors where there is a general ban on the use of labour supply at the national level
LT	Lietuvos įdarbinimo įmonių asociacija	LĮJA	True	Entire country		x			x		x	x	x		x	x			
LU	FEDIL Employment Services	FES	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	Only the private security sector is not concerned by TW
LV	Latvijas Pagaidu darba aģentūru asociācija	LPDAA	True	Entire country															
MT	Malta Employers Association	MEA	False	Entire country	x		x		x		x	x	x	x	x	x			Yes – administrative/ clerical services and security services
MT	Malta Chamber of SMEs	SME Chamber	False	Entire country			x				x		x						Yes – fast-moving consumer goods, information technology professionals, administrative/ clerical services and security services
NL	Algemene Bond Uitzendondernemingen	ABU	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	Yes – all sectors
NL	Nederlandse Bond van Bemiddelings- en Uitzendondernemingen	NBBU	False	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	x	Yes – all sectors

Representativeness of the European social partner organisations: Temporary agency work sector

PL	Polskie Forum HR	PFHR	True	Entire country		x					x					x		It does not have a specific focus, but, due to some legal issues, it does not operate in the following sectors: construction, care and the public sector
PL	Ogólnopolski Konwent Agencji Pracy	OKAP	False	Entire country								x	x			x		
PT	Associação Portuguesa das Empresas do Setor Privado de Emprego e de Recursos Humanos	Apespe RH	True	Entire country	x	x			x	x	x	x	x		x	x		Yes – contact centres, ports, hotels, restaurants and catering and information technology
RO	Asociația Furnizorilor de Servicii de Resurse Umane	AFSRU	True	Entire country	x	x			x	x	x	x	x	x	x	x	x	Yes
SE	Kompetensföretagen	KF	True	Entire country	x	x	x	x	x	x	x	x	x	x	x	x	x	
SI	Združenje agencij za zaposlovanje	ZAZ	False	Entire country	x	x			x	x	x	x		x		x	x	Yes – mining, transport and warehousing, finance and insurance, professional, scientific and technical activities and other business activities
SK	Asociácia personálnych agentúr Slovenska	APAS	False	Entire country	x	x	x	x	x	x	x	x		x	x	x	x	Yes

(a) Please note, this EO/BA was previously called the VZA – Verband Zeitarbeit und Arbeitsvermittlung (Austrian Association of Employment and Placement Agencies) and renamed several years ago). In the previous REP study, it is included as VZA.

Notes: BA, business association; EO, employer organisation.

Representativeness of the European social partner organisations: Temporary agency work sector

Table A82: Position of national employer organisations and business associations in the industrial relations landscape of the country

Member State	EO/BA name	EO/BA abbreviation	Member of WEC-Europe	Organisation considered an EO or a BA	Recognised representative at the national level		Involved in social dialogue bodies for TAW	Consulted by government	Collective bargaining level		Affiliation at the national level
					Yes/no	Based on			Sector	Company	
AT	Verband Österreichs Personaldienstleister	ÖPDL	True	BA	No	Not applicable	No	No	No	No	None
AT	Association of the Commercial Service Providers	FVGD	False	EO	Yes	Mutual recognition (and based on the right to conclude collective agreements)	Yes, informally	Yes – both ad hoc and regularly	Yes	No	Federal Economic Chamber
BE	Federgon	Federgon	True	EO	Yes	Both fulfilment of legal requirements and mutual recognition	Both	Yes	Yes	Only as an advisory	VBO-FEB
BE	Union of Belgian Enterprises	VBO-FEB	False	EO	Yes	Both fulfilment of legal requirements and mutual recognition		Yes, regularly	Yes	Only as an advisory	Not applicable; it is a national-level EO
BG	Национална конфедерация по заетостта – България	HKЗБ	True	BA	No	Not applicable		No	No	No	None
BG	Bulgarian Employment Confederation	BEC	False	BA	No	Not applicable	No	Not directly, but through BICA	No	No	BICA
CY	No organisation										
CZ	Association of Personal Service Providers	APPS	False	BA	No	Not applicable	No	Yes, ad hoc	No data	No	Confederation of Industry of the Czech Republic
CZ	Association of Working Agencies	APA	False	BA	No	Not applicable	Yes – APA has an occasional representative in the tripartite working group on labour relations, collective bargaining and employment	Yes, ad hoc	No (no partner)	No (no partner)	Association of Small and Medium-sized Enterprises and Crafts of the Czech Republic, which is a member of the Confederation of Industry of the Czech Republic
DE	Bundesarbeitgeberverband der Personaldienstleister	BAP	True	EO	Yes	Mutual recognition	No – there are no such bodies in Germany	Yes, ad hoc	Yes	No	BDA
DE	Association of German Temporary Employment Agencies	IGZ	False	EO	Yes	Mutual recognition	No – there are no such bodies in Germany	Yes, ad hoc	Yes	No	None

Representativeness of the European social partner organisations: Temporary agency work sector

DK	Dansk Erhverv	None	True	Both	Yes	Mutual recognition	Yes – through collective bargaining and through the Confederation of Danish Employers	Yes	Yes	Yes	Confederation of Danish Employers (peak level)
DK	Dansk Industri	DI	False	Both	Yes	Mutual recognition	Yes – DI takes part when the government invites it to tripartite negotiations	Yes, ad hoc	Yes	No, not for TAW	Confederation of Danish Employers (peak level)
DK	Federation of Staffing Agencies in Denmark	VB	False ⁽⁵⁰⁾	Both	Yes	Mutual recognition	Yes – through collective bargaining and through the Confederation of Danish Employers	Yes, ad hoc	Yes	Yes	Confederation of Danish Employers (peak level)
EE	Eesti Personalitettevõtete Liit	EPREL	True	Both, since it is focused on business and commercial interests but also involved in social dialogue	No national definitions/ rules	N.A.	There are no trade unions in the sector, but the EO is a member of the Estonian Employers' Confederation and the Estonian Service Industry Association. They exchange information and participate in discussions	It is not consulted by the government; rather, the EO itself has initiated discussions with different ministries regarding TAW and related policies. The organisation has not initiated any discussions in the past few years	No	No	Estonian Employers' Confederation, Estonian Service Industry Association
EL	Ενωση Ιδιωτικών Εταιρειών Απασχόλησης	Ενιδεα	True	BA	Yes	Mutual recognition	No	N.A.	No	No	None
ES	Asociación de Agencias de Empleo y Empresas de Trabajo Temporal	Asempleo	True	EO	Yes	Legal requirements	Yes	Yes, ad hoc (change in employment legislation)	Yes	No	CEOE

⁽⁵⁰⁾ The VB is not counted as a WEC-member throughout this study despite its indirect membership via Dansk Erhverv, to which this EO is affiliated at the national level. Organisations have to be members of Dansk Erhverv to become members of the Federation. The two organisations are very integrated.

Representativeness of the European social partner organisations: Temporary agency work sector

FI	Henkilöstöala HELA ry	HELA	True	EO	Yes	Mutual recognition	Yes – in several working groups; for instance in those of the Ministry of Economic Affairs and Employment, which cover both TWAs / TAW workers and the whole NACE 78, not only NACE 78.20	Yes	Yes	No	EK
FI	Palvelualojen työnantajat PALTA ry	PALTA	False	EO	Yes	Mutual recognition	Yes – in the Ministry of Economic Affairs and Employment working group on employment roadmaps for 2021–2022, where it sought solutions to address skills shortages in sectors with labour shortages	No	Yes – the EO has a collective bargaining agreement covering the internal staff of TWAs. The EO does not engage in collective bargaining for all member-related sectors, which also covers their TWA members	No	EK
FR	Prism'emploi	Prism'emploi	True	EO	Yes	Fulfilment of legal requirements	Yes	Yes	Yes	No	MEDEF and CPME
HR	Hrvatska udruga poslodavaca, Koordinacija za agencije za privremeno zapošljavanje i posredovanje pri zapošljavanju	HUP	False	EO	Yes	Legal basis	No – because there is no bipartite or tripartite social dialogue related to the TAW sector	No	No – there is no collective bargaining at the sector level for TAW	No – there is no collective bargaining at the company level for TAW	None
HU	Magyar Munkaerő-kölcsönzők Országos Szövetsége	MMOSZ	False	BA	No	Not applicable	No	Yes, regularly	No	No	VOSZ and MGYOSZ
HU	Magyarországi Diákvállalkozások Országos Érdekképviselői Szövetsége	Diákész	False	BA	No	Not applicable	No	Yes, ad hoc (change in employment legislation)	No	No	National Council of Cooperatives (Országos Szövetkezeti Tanács)
IE	Employment and Recruitment Federation	ERF	True	Both	Yes	Mutual recognition	Not currently	Yes	Not currently	No	N.A.

Representativeness of the European social partner organisations: Temporary agency work sector

IT	Associazione Nazionale di Categoria delle Agenzie per il Lavoro	Assolavoro	True	EO	Yes	Mutual recognition	N.A.	Yes – both in the field of labour supply and on broader labour issues	Yes	Yes	Confindustria
IT	Associazione Italiana delle Agenzie per il Lavoro	Assosomm	False	EO	Yes	Mutual recognition	No data	No data	No data	No data	No data
LT	Lietuvos įdarbinimo įmonių asociacija	LIIA	True	BA (but is affiliated to the national-level EO as well)	Yes	Mutual recognition	No	Yes	No	No	Confederation of Lithuanian Employers
LU	FEDIL Employment Services	FES	True	EO	Yes	Mutual recognition	Yes – Comité permanent du travail et de l'emploi	No	Yes	No	FEDIL
LV	Latvijas Pagaidu darba aģentūru asociācija	LPDAA	True	BA	Most probably, yes	Both	No such body	Yes	No	No	None
MT	Malta Employers Association	MEA	False	EO	Not applicable	Not applicable	Not specifically for the TAW sector. However, the MEA raised its concerns about the lack of regulation in this sector and started lobbying for the sector to be regulated.	Yes, ad hoc	No	No	Not applicable
MT	Malta Chamber of SMEs	SME Chamber	False	EO	Not applicable	Not applicable	There is no specific body in charge of TAW matters. However, tripartite social dialogue on temporary work is currently occurring	No – not specifically in relation to the TWA sector	No	No	Not applicable
NL	Algemene Bond Uitzendondernemingen	ABU	True	EO	Yes	Both (it undertakes a representativeness study every year to extend the collective bargaining agreement)	Yes – collective bargaining negotiations and the social sectoral dialogue of the EU	Yes	Yes	No	WEC
NL	Nederlandse Bond van Bemiddelings- en Uitzendondernemingen	NBBU	False	EO	Yes	Mutual recognition	Not in the main bodies SER (tripartite) and STVDA (bipartite), but through the board of MKB-Nederland (largest SME branch association)	Yes – both regularly and ad hoc	Yes	No	MKB-Nederland

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PL	Polskie Forum HR	PFHR	True	EO	Yes	Yes – indirectly. Confederation Lewiatan fulfils the legal requirement	Yes – in the Social Dialogue Council through Confederation Lewiatan. It is a nationwide tripartite council, not specific to any sector/industry	Yes, they are consulted due to their cooperation with Employers of Poland, especially on issues related to the labour market and TAW. It participates in the public consultations on legislative changes and cooperates with the Ministry of Family and Social Policy (responsible for labour policies)	No / no data	No / no data	N.A.
PL	Ogólnopolski Konwent Agencji Pracy	OKAP	False	EO	Yes	Yes – indirectly, as a member of Employers of Poland, which fulfils the legal requirement	Yes – in the Social Dialogue Council through Employers of Poland. It is a nationwide tripartite council, not specific to any sector/industry	Yes – both regularly and ad hoc	No / no data	No / no data	N.A.
PT	Associação Portuguesa das Empresas do Setor Privado de Emprego e de Recursos Humanos	Apespe RH	True	Both EO and BA	Yes	Mutual recognition	There is no specific social dialogue body in the sector	N.A.	Yes – in 1989, Apespe RH signed the MEB agreement with Fetese. Today, this MEB agreement still applies to a significant number of TAW workers	No	CCP
RO	Asociația Furnizorilor de Servicii de Resurse Umane	AFSRU	True	BA	This is a BA; only EOs are legally representative	Does not apply	Yes – at the European level to WEC-Europe	Yes	No	No	No one

Representativeness of the European social partner organisations: Temporary agency work sector

SE	Kompetensföretagen	KF	True	EO	Yes	Mutual recognition	No social dialogue bodies	Yes	Yes	No	Svenskt Näringsliv
SI	Združenje agencij za zaposlovanje	ZAZ	False	BA	No	According to national rules only, five big EOs are considered representative and are included in national-level social dialogue	No	Yes, ad hoc	No	No	ZDS
SK	Asociácia personálnych agentúr Slovenska	APAS	False	EO	Yes	Fulfilment of legal requirements and mutual recognition	No	Yes	No	No	AZZZ

Notes: AZZZ, Asociácia zamestnávateľských zväzov a združení; BA, business association; BICA, Bulgarian Industrial Capital Association; EK, Confederation of Finnish Industries (Elinkeinoelämän keskusliitto); EO, employer organisation; MGYOSZ, Confederation of Hungarian Employers and Industrialists; VOSZ, National Association of Entrepreneurs and Employers; ZDS, Employers' Association of Slovenia (Združenje delodajalcev Slovenije).

Representativeness of the European social partner organisations: Temporary agency work sector

Table A83: Landscape of employer organisations and business associations representing the employers / TWAs – full data

Member State	EO/BA name	EO/BA abbreviation	Member of WEC-Europe	Number of TWA members (with comments)	Number of TWA members (numbers only, for calculation)	Membership trend over the 2–3 years prior to the study	Largest EO/BA in the sector in terms of representativeness of the larger TWAs companies	Largest EO/BA in the sector in terms of representativeness of the smaller TWAs in the sector	Size of the companies employing organised workers			
									1–9	10–49	50–249	> 250
AT	Verband Österreichs Personaldienstleister	ÖPDL	True	101	101	Stable / slightly increased	Second largest	Second largest		6	25	70
AT	Association of the Commercial Service Providers	FVGD	False	911	911	Increased	Largest (due to mandatory membership)	Largest (due to mandatory membership)	361	214	271	65
BE	Federgon	Federgon	True	Around 200	200	No data	Largest	Largest	No data	No data	No data	No data
BE	Union of Belgian Enterprises	VBO-FEB	False	50	50	No data	Second largest	Second largest	No data	No data	No data	No data
BG	Национална конфедерация по заетостта – България	HK3Б	True	3	3	Stable	Second largest	No members of the smaller TWA	0	0	0	3
BG	Bulgarian Employment Confederation	BEC	False	10	10	Stable	Largest	Largest	1	1	2	6
CY					0							
CZ	Association of Personal Service Providers	APPS	False	30	30	Decreased	Large	No data	7	6	2	15
CZ	Association of Working Agencies	APA	False	50	50	Increasing, but slowly	Second largest	No data	4	4	40	4
DE	Bundesarbeitgeberverband der Personaldienstleister	BAP	True	Nearly 1 600	1 600	Stable	No information by company size; largest EO in the sector	No information by company size; second largest EO in the sector	194	441	409	131
DE	Association of German Temporary Employment Agencies	IGZ	False	3 778	3 778	Increased	Largest	Largest	No data	No data	No data	No data
DK	Dansk Erhverv	None	True	172	172	Stable	Largest	Largest	X	X	X	X
DK	Dansk Industri	DI	False	128	128	Increased	Largest in terms of companies with > 50 employees (estimate); available data do not allow a comparison with other EOs	Second largest	40	51	30	7

Representativeness of the European social partner organisations: Temporary agency work sector

DK	Federation of Staffing Agencies in Denmark	VB	False ⁽⁵¹⁾	24	24	Stable	No	No	No data	No data	No data	No data
EE	Eesti Personalitettevõtete Liit	EPREL	True	6	6	Has been stable	The only one	The only one	0	0	5	1
EL	Ενωση Ιδιωτικών Εταιρειών Απασχόλησης	Ενιδεα	True	6	6	No data	Largest (and, according to desktop research, the only one)	Seems to be the only one; no information indicating that it represents small TWAs in the sector				
ES	Asociación de Agencias de Empleo y Empresas de Trabajo Temporal	Asempleo	True	85	85	Increased	The only one	The only one	1	6	13	65
FI	Henkilöstöala HELA ry	HELA	True	About 420 member companies directly affiliated to the EO; around half are large business groups	420	Increased	Largest	Largest	No data	No data	No data	No data
FI	Palvelualojen työnantajat PALTA ry	PALTA	False	About 24	24	Increased	Second largest	Second largest		4	14	6
FR	Prism'emploi	Prism'emploi	True	600	600	Increased	Largest	Largest	The EO does not collect this information	The EO does not collect this information	The EO does not collect this information	The EO does not collect this information
HR	Hrvatska udruga poslodavaca, Koordinacija za agencije za privremeno zapošljavanje i posredovanje pri zapošljavanju	HUP	False	17	17	Stable	The only one	The only one	6	8	1	2
HU	Magyar Munkaerő-kölcsönzők Országos Szövetsége	MMOSZ	False	21	21	Increased	Largest	No data	3	5	2	11

⁽⁵¹⁾ The VB is not counted as a WEC-Europe member in this study despite its indirect membership through Dansk Erhverv, to which this employer organisation is affiliated at the national level. Organisations have to be members of Dansk Erhverv to become members of the federation. The two organisations are highly integrated.

Representativeness of the European social partner organisations: Temporary agency work sector

HU	Magyarországi Diákállalkozások Országos Érdekvédelmi Szövetsége	Diákész	False	16	16	Increased	Largest	No data	No data	No data	No data	No data
IE	Employment and Recruitment Federation	ERF	True	Over 200 private sector employment services businesses in the employment staffing industry; ERF estimates that there are about 450 operating agencies in Ireland (while the number of licences issued is higher)	200	Increased	Largest	Largest				
IT	Associazione Nazionale di Categoria delle Agenzie per il Lavoro	Assolavoro	True	More than 50 TWAs	50	Increasing	The supply labour market in Italy is highly concentrated, with the main players accounting for the largest part of the sector's total turnover; almost all of these are members of Assolavoro	The supply labour market in Italy is highly concentrated, with the main players accounting for the largest part of the sector's total turnover; almost all of these are members of Assolavoro	Not specified	Not specified	Not specified	Not specified
IT	Associazione Italiana delle Agenzie per il Lavoro	Assosomm	False	47 TWAs	47	No data	No data	No data	Not specified	Not specified	Not specified	Not specified
LT	Lietuvos įdarbinimo įmonių asociacija	LJJA	True	7	7	Decreased	Largest	Largest	0	2	2	3
LU	FEDIL Employment Services	FES	True	32	32	Increased	The only EO in the sector	The only EO in the sector	No precise information or estimate	No precise information or estimate	No precise information or estimate	No precise information or estimate
LV	Latvijas Pagaidu darba aģentūru asociācija	LPDAA	True	3	3	Stable	Only	Only	0	0	1	2
MT	Malta Employers Association	MEA	False	20	20	Stable	Largest	Largest	No data	No data	10	10

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MT	Malta Chamber of SMEs	SME Chamber	False	8	8	Increased	Second largest	Second largest	No data	No data	3	5
NL	Algemene Bond Uitzendondernemingen	ABU	True	522	522	Stable	Largest	Second largest	Unknown	Unknown	Unknown	Unknown
NL	Nederlandse Bond van Bemiddelings- en Uitzendondernemingen	NBBU	False	1 283	1 283	Increased	Second largest	Largest	200	300	400	300
PL	Polskie Forum HR	PFHR	True	Around 30; importantly, not all members are TWA (all members are labour/career agencies, but some may specialise in long-term career guidance; others are TWAs and have combined services)	30	Increased (during the pandemic)	Probably the largest	Difficult to estimate		The majority of the members	The majority of the members	Some members
PL	Ogólnopolski Konwent Agencji Pracy	OKAP	False	Around 50, but not all members are TWAs. All members are labour/career agencies, but some may specialise in long-term career guidance; others are TWAs and have combined services)	50	Decreasing	Probably second largest	Difficult to estimate		The majority of the members	The majority of the members	

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PT	Associação Portuguesa das Empresas do Setor Privado de Emprego e de Recursos Humanos	Apespe RH	True	40	40	Increased	Largest	Largest				
RO	Asociația Furnizorilor de Servicii de Resurse Umane	AFSRU	True	14	14	Decreasing	The only one	No other BA in the sector	3	1	1	9
SE	Kompetensföretagen	KF	True	921	921	Increased	Largest	Largest	401	303	156	61
SI	Združenje agencij za zaposlovanje	ZAZ	False	10	10	Stable	The only one	The only one	No data	No data	No data	No data
SK	Asociácia personálnych agentúr Slovenska	APAS	False	9 direct members plus 400 indirect members	9	Decreased	The largest	n/a – the smaller TWAs are not members of any association	0	0	2	7

Notes: BA, business association; EO, employer organisation.

Representativeness of the European social partner organisations: Temporary agency work sector

Table A84: Largest TWAs in each Member State

Member State	Largest TWAs	National or multinational company (if multinational, parent or subsidiary)	Estimated number of TAW employees	TUs organising the TAW employees in this TWA	TU affiliated to UNI Europa Agency Workers (at least one) (true/false)	EO(s) to which the TWA employer is affiliated		At least one EO/BA affiliated to WEC-Europe (true/false)	Collective bargaining agreement applicable (SEB/MEB, both SEB and MEB)	Is this company affiliated to the WEC? (yes = via parent company / WEC corporate member)
						Not affiliated to WEC-Europe	Affiliated to WEC-Europe			
AT	Trenkwalder Personaldienste	Trenkwalder Personaldienste	7 000	PRO-GE, GPA	True	FVGD	ÖPDL	True	MEB	No
AT	Manpower	Manpower	n.a.	PRO-GE, GPA	True	FVGD	ÖPDL	True	MEB	Yes
AT	Hoffmann	Hoffmann	n.a.	PRO-GE, GPA	True	FVGD	ÖPDL	True	MEB	Yes
BE	Randstad	Randstad	25 000	ACLVB-CGSLB, ACV-CSC Puls, ACV-CSC CNE, ACV-CSC METEA, ACV-CSC Food and Services, ACV-CSC BIE, ACV-CSC Transcom, ABVV-FGTB Horval, ABVV-FGTB BTB, ABVV-FGTB Metaal, ABVV-FGTB ACCG, ABVV-FGTB BBTk-SETCA	True	VBO-FEB	Federgon	True	Both	No reply
BE	Start People	USG Group	10 000	ACLVB-CGSLB, ACV-CSC Puls, ACV-CSC CNE, ACV-CSC METEA, ACV-CSC Food and Services, ACV-CSC BIE, ACV-CSC Transcom, ABVV-FGTB Horval, ABVV-FGTB BTB, ABVV-FGTB Metaal, ABVV-FGTB ACCG, ABVV-FGTB BBTk-SETCA	True	VBO-FEB	Federgon	True	Both	No reply

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BE	Adecco	Adecco	8 500	ACVLB-CGSLB, ACV-CSC Puls, ACV-CSC CNE, ACV-CSC METEA, ACV-CSC Food and Services, ACV-CSC BIE, ACV-CSC Transcom, ABVV-FGTB Horval, ABVV-FGTB BTB, ABVV-FGTB Metaal, ABVV-FGTB ACCG, ABVV-FGTB BBTk-SETCA	True	VBO-FEB	Federgon	True	Both	No reply
BG	Trenkwalder	Trenkwalder	1 256	None		BEC			None	No
BG	Easy Consult	Easy Consult	697	None		BEC			None	No
BG	Manpower Bulgaria	Manpower	695	None			HK35	True	None	Yes
CY	Access to data refused by the ministry		n.a.							
CZ	Manpower	Manpower	n.a.			APPS				
CZ	N.A.									
CZ	N.A.									
DE	Randstad Deutschland	Randstad	36 000				BAP	True	MEB	Yes
DE	Adecco Germany Holding	Adecco	26 674				BAP	True	MEB	Yes
DE	Persona Service		13 016			IGZ			MEB	No
DK	JKS		6 401	na					MEB	No
DK	Moment	Edda Group	5 787	na		DI	Dansk Erhverv	True	MEB	No

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DK	Carelink		4 255	Danish Nurses' Organization, Trade and Labour, Association of Child and Youth Educators		DI and VB	Dansk Erhverv	True	MEB	No
EE	Finesta	Finesta	750	None		EPREL		True	Not involved in collective bargaining	No
EE	Humanlink Estonia	Humanlink Estonia	353	None					Not involved in collective bargaining	No
EE	Euro Work	Euro Work	228	None					Not involved in collective bargaining	No
EL	No data									
EL	No data									
EL	No data									
ES	Randstad		19 223	Union y Empleo, CCOO and UGT	True		Aempleo			Yes
ES	Adecco		23 490	Union y Empleo			Aempleo			Yes
ES	Manpower		15 250	N.A.			Aempleo			Yes
FI	Barona	Barona	12 600	The TU depends on the sector where the TAW worker is employed. For instance, PAM organises TAW workers in the services sector, and Teollisuusliitto organises those in the industry sector			HELA	True	MEB + MEB with extension	No

Representativeness of the European social partner organisations: Temporary agency work sector

FI	Eezy		32 000 (per year)	As above		PALTA			MEB + MEB with extension	No
FI	Staffpoint		14 300	As above			HELA	True	MEB + MEB with extension	No
FR	Adecco	Adecco	9 000 permanent staff plus 430 000 per year	CFDT, CFTC, CFE-CGC, CGT, CGT-FO	True		Prism'emploi	True	SEB/MEB	Yes
FR	Manpower	Manpower	3 950 permanent staff plus 80 000 per week	CFDT, CFTC, CFE-CGC, CGT, CGT-FO	True		Prism'emploi	True	SEB/MEB	Yes
FR	Randstad	Randstad	2 500 permanent staff plus 85 000 per week	CFDT, CFTC, CFE-CGC, CGT, CGT-FO	True		Prism'emploi	True	SEB/MEB	Yes
HR	Dekra zapošljavanje	Dekra	400	None		None	None		None	No
HR	Trenkwalder za privremeno zapošljavanje	Trenkwalder	350	None		None	None		None	No
HR	Kadus		300	None		None	None		None	No
HU	Prohumán 2004		7 345	None		MMOSZ			None	None
HU	WHC		5 470	None		MMOSZ			None	None
HU	Work Force		3 049	None		None			None	None

Representativeness of the European social partner organisations: Temporary agency work sector

IE	Staffline / Grafton Recruitment		14 000				Affiliated through membership of ERF	True	na	
IE	CPL		13 000				Affiliated through membership of ERF	True	na	
IE	Morgan McKinley	Morgan McKinley	n.a.				Affiliated through membership of ERF	True	na	
IT	Adecco Italia	Adecco	50 000	FELSA CISL, NIDIL CGIL, Uiltemp	True		Assolavoro	True	MEB	Yes
IT	Randstad Italy	Randstad	40 000	FELSA CISL, NIDIL CGIL, Uiltemp	True		Assolavoro	True	MEB	Yes
IT	GI Group	GI Group	35 000	FELSA CISL, NIDIL CGIL, Uiltemp	True		Assolavoro	True	MEB	Yes
LT	Headex Group	Headex	2 300	None			LJJA	True	None	No
LT	Biuro	Biuro	1 400	None			LJJA	True	None	No
LT	Litpark		860	None		None			None	No
LU	Randstad Interim	Randstad	1 480	OGB-L, LCGB Services	True		FES	True	MEB	Yes
LU	Adecco Luxembourg	Adecco	1 120	OGB-L, LCGB Services	True		FES	True	MEB	Yes
LU	Sofies SARL Personnel Temporaire		1 060	OGB-L, LCGB Services	True		FES	True	MEB	No
LV	Biuro	mnc name?	593	None			LPDAA	True	None	No
LV	Manpower Lit	Manpower	500	None			LPDAA	True	None	Yes
LV	Simplika	mnc name?	220	None			LPDAA	True	None	No

Representativeness of the European social partner organisations: Temporary agency work sector

MT	OZO Group		3 000+	GWU		MEA			SEB	No data
MT	Healthmark		3 000+	GWU		na			SEB	No data
MT	G4S Malta	G4S	1 500+	GWU		na			SEB	No data
NL	Randstad Group NL	Randstad	68 000	FNV, CNV, De Unie, LBV	True		ABU	True	MEB	Yes
NL	HeadFirst Group		25 000	FNV, CNV, De Unie, LBV	True		ABU	True	MEB	No
NL	RGF Staffing NL	RGF Staffing	15 000	FNV, CNV, De Unie, LBV	True		ABU	True	MEB	yes
PL	Randstad	Randstad	Tens of thousands	na			PFHR	True	None	Yes
PL	ManpowerGroup	ManpowerGroup	Tends of thousands	na			PFHR	True	None	Yes
PL	Adecco Group	Adecco Group	Tens of thousands	na			PFHR	True	None	Yes
PT	Multipessoal		4 878	Sinttav	True		Apespe RH	True	MEB	No
PT	Multitempo	Job&Talent	4 044	Sinttav	True		Apespe RH	True	MEB	No
PT	Triangulu		3 000	No information obtained			Apespe RH	True	MEB	No
RO	Lugera & Makler Romania		4 217	na			AFSRU	True	No information available, but the law requires any company with more than 21 employees to have collective bargaining	No

Representativeness of the European social partner organisations: Temporary agency work sector

RO	Prohuman APT		3 330	na			AFSRU	True	No information available, but the law requires any company with more than 21 employees to have collective bargaining	No
RO	Adecco Resurse Umane	Adecco	3 079	na			AFSRU	True	No information available, but the law requires any company with more than 21 employees to have collective bargaining	Yes
SE	Manpower	Manpower	5 020	Unionen, Ledarna, member unions of AHT, LO	True		KF	True	MEB	Yes
SE	Randstad	Randstad	4 915	Unionen, Ledarna, member unions of AHT, LO	True		KF	True	MEB	Yes
SE	Lernia Bemanning		4 228	Unionen, Ledarna, member unions of AHT, LO			KF	True	MEB	No
SI	Kariera		2 300	na		ZAZ			No collective bargaining	No
SI	Adecco H.R.	Adecco	1 500	na		ZAZ			No collective bargaining	No
SI	Trenkwalder	Trenkwalder	873	na		ZAZ			No collective bargaining	No
SK	Index Nosluš		2 077	na		APAS, AZZZ			na	No

Representativeness of the European social partner organisations: Temporary agency work sector

SK	Adecco Slovakia	Adecco	1 100	na		na			na	No
SK	Transfer International Staff		936	na		na			na	No

Notes: AZZZ, Asociácia zamestnávateľských zväzov a združení; BA, business association; EO, employer organisation; TU, trade union. Membership of UNI Europa Agency Workers is indicated in **green**. Membership of WEC-Europe is indicated in **orange**.

Source: Network of Eurofound Correspondents, 2023.

Representativeness of the European social partner organisations: Temporary agency work sector

Table A85: Assessment of representatives of UNI Europa Agency Workers, by Member State

Member State	Is the TU with the most TAW TU members affiliated to UNI Europa? (yes/no)	If there is more than one TU in TAW, is the second largest TU affiliated to UNI Europa? (yes/no)	Do the member unions of UNI Europa cover all types of employees in the sector? (yes/no) If no, please explain which groups of employees are not covered	Are there TUs with members in the sector that are not affiliated to UNI Europa? (yes/no) If yes, are they large /relatively large in comparison with the others?	Can you describe the representativeness of the TUs that are not members of UNI Europa for the TAW workforce?	Are there any other European TU associations with representativeness in the sector? (yes/no)
AT	No	Yes – GPA	No – only white-collar employees are covered	Yes – the largest (PRO-GE) covering all blue-collar TAW workers	Theoretically (PRO-GE organises and represents between 10 % and 15 % of all TAW workers)	No
BE	Yes – both ACV-CSC and ABVV-FGTB	Yes – ACLVB-CGSLB	Yes	No		
BG	Not relevant					
CY	No union					
CZ	Not relevant	Not relevant	Not relevant	Not relevant	Not relevant	Not relevant
DE	No. The union which organises most TAW is the IG Metall, affiliated to industriALL. Ver.di as a member of UNI Europa only organises the second most TAW workers.	Yes – ver.di.	In principle, there is an agreement between the DGB unions in the collective bargaining community that TAWs are organised according to the sector in which they work. In the case of company agreements– e.g. at the TWA Brunel assigning engineers and technicians – ver.di sometimes negotiates on behalf of TAWs which are assigned to companies in manufacturing or the chemical sector.	Yes, in principle all 8 member unions of the DGB. The three TUs with by far the most members in the sector are IG Metall being the largest, then ver.di, and IG BCE.	IG Metall organises most workers in the sector, because most TAWs work in manufacturing. There are also many TAWs in the chemical sector organised by IG BCE. By far the most sector level agreements which cover TAWs have been signed by these two unions.	Yes, industriALL Europe in which both IG Metall and IG BCE are members. Most sector level agreements which cover TAWs have been signed by these two unions
DK	No	Yes – HK Privat	They only cover white-collar workers. They do not cover, for instance, blue-collar workers, professionals, or social and healthcare workers	DM has members who are academics, but it resigned from UNI Europa in 2023	Yes – including 3F, the largest and arguably most representative TU in the sector	
EE	No union					
EL	No union					

Representativeness of the European social partner organisations: Temporary agency work sector

ES	No – the most important union in the sector (Unión y Empleo) is not affiliated	Yes – both the second and the third largest unions (CCOO and UGT)	Yes	Yes – Unión y Empleo is currently the largest union in the sector in terms of representativeness (no information available on its membership figures)	Currently, Unión y Empleo is the most representative at the national level, with seven seats at the bargaining table of the national sectoral collective agreement (compared with six in total for UGT and CCOO)	No
FI	Yes – at least according to available numbers, PAM is the largest. However, since the number of TAW members of ERTO is unknown, it is not certain. Considering that ERTO has in total 15 000 members, it is unlikely that over 8 000 of these (the number of TAW members in PAM) are TAW workers. Therefore, the conclusion is that PAM is the largest in TAW	Yes – based on the current available numbers, Teollisuusliitto is, but for other sectors	No – not if only considering the member union that specifically represents TAW workers in UNI Europa. It only covers the service sector, where no employees in micro-, small or large companies are covered. If also including the TU not representing TAW workers in UNI Europa, then the industry sector is covered. In the industry sector, all groups and types are covered	Yes – TAW workers are often affiliated to the TU representing the sector to which they are assigned. This means that, in theory, there are as many relevant TUs as there are sectors where TAW workers are employed. However, TAW workers will make up only a fraction of the members of many of them. Since not all TUs have been contacted, it cannot be known how many are affiliated to UNI Europa. One of the largest TUs, Teollisuusliitto, is affiliated to UNI Europa, but not as a representative of TAW workers. In addition, the Ammattiliitto Pro is affiliated to UNI Europa but not for TAW workers, although it sees this as something that could be valuable	TUs are, in most cases, sector specific and represent workers in their specific sectors, including TAW workers. Representativeness thus varies depending on which sector the TU covers	No examples were provided by the TUs, and it is not known if there are any other sector-related TUs that are affiliated to other European associations for TAW workers. This is, however, very unlikely
HR	No union					

Representativeness of the European social partner organisations: Temporary agency work sector

HU	No	No	No	No	No	IndustriAll has several Hungarian federations as its members, like BDSZ, Vasasok, Chemical Workers' Union, MOL Miners' Union and the confederation LIGA; meanwhile UNI Europa has only a limited number of Hungarian affiliates, namely those like BBDSZ, the nursery workers' union. The major Hungarian unions operate in the field of industry and are members of IndustriAll
IE	No			Yes – SIPTU and the CWU. SIPTU is Ireland's largest TU and represents workers from almost every sector, including TAW. The CWU is primarily a union for postal, logistics, telecommunications, technology and call centre workers	Neither of the unions represent TAW workers exclusively. No national union solely represents TAW workers. SIPTU represents some TAW workers in employment agencies, while the CWU represents TAW workers in the communications sector	No

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IT	Yes – considering NIDIL CGIL, Filcams CGIL, FELSA CISL, FIRST CISL and Uiltucs as the largest in the sector	Yes – considering NIDIL CGIL, Filcams CGIL, FELSA CISL, FIRST CISL and Uiltucs as the largest in the sector	Yes	No information on Uiltemp	No data, but similar to the representativeness of NIDIL CGIL and FELSA CISL	No data
LT	No union					
LU	Yes – OGB-L	Yes: LCGB Services	Yes	No	NA	No
LV	Not relevant. LKDAF does not have members in TAW sector.	Not relevant	No	No	None	No
MT	Yes – the GWU is affiliated to UNI Europa; however, this is not UNI Europa agency workers	No – the second largest TU, UHM, is not affiliated to UNI Europa	The GWU covers the majority of occupational groups with TAW workers. Some occupational groups are notably absent, including construction workers, couriers and professionals	Yes – UHM. This is the second largest union, after the GWU, and only represents around 1 300 TAW workers	Minimal importance given that UHM only represents around 1 300 TAW workers.	No
NL	Yes – FNV	Do not know – refused to reply	Yes	Maybe CNV (but it did not reply) and De Unie	If CNV is not a member, it is an important representative player in the field	No
PL	No	n/a	n/a	Yes	Difficult to estimate	None identified
PT	Yes – Sinttav	Yes – Sindetelco	Large parts, but possibly not all	Yes – the very small unions representing port workers) are not members of UNI Europa	These TUs represent a very small group of TAW workers in a very specific area	There are no TUs with representativeness in the sector that are affiliated to other European TU associations
RO	No union					

Representativeness of the European social partner organisations: Temporary agency work sector

SE	Yes – Unionen	No – SEKO is a member of the LO collective, but it is a member of UNI Europa Agency Workers because it has some members in the sector. It is not the second largest organiser of TAW workers	No – most blue-collar workers are not covered by UNI Europa. This is because they are organised in their sectoral TUs, which are not always members of UNI Europa	Yes – AHT and LO are not members, and they cover almost all of the sector	Because this question covers every sector, it can be stated that each member union is considered representative in its sector based on mutual recognition	Not specifically for TAW
SI	No	n.a.	n.a.	Yes – there is only one TU organising TAW workers, SSS, as described above	It is not representative, as it has very low membership of TAW workers	SSS is member of ZSSS, which is a member of ETUC
SK	It does not apply	It does not apply	It does not apply	Yes – but their importance cannot be assessed	N/A	N/A

Notes: TU, trade union.

Representativeness of the European social partner organisations: Temporary agency work sector

Table A86: Assessment of the representativeness of WEC-Europe, by Member State

Member State	Is the EO with the highest sectoral representativeness in terms of the collective workforce of all member companies in the sector affiliated to WEC-Europe? (yes/no)	If there is more than one employer organisation in the TAW sector, is the second largest employer organisation (for the entire TAW sector) affiliated to WEC-Europe?	Do the affiliates of WEC-Europe cover all types of employers in the sector (yes/no)	Is there any sectoral, national EO or important company in the sector in your country that is affiliated to any other European association?
AT	No – the FVGD is not affiliated to the WEC	The second largest EO/BA (the voluntary ÖPDL) is affiliated to the WEC	In theory, yes – but in practice, the smallest companies in the sector are not covered	No
BE	Yes – Federgon	No – VBO-FEB	Yes	Yes – VBO-FEB is affiliated to BusinessEurope
BG	No – BEC	Yes – HK35	No – the smaller TWAs in the sector are not covered	No
CY	No EO			
CZ	Not relevant	Not relevant	Not relevant	Not relevant
DE	BAP (second largest EO) is a WEC member; IGZ is not	Yes – BAP (second largest EO) is a WEC member	Yes	Not to the respondent's knowledge
DK	Yes – Dansk Erhverv	No – DI	Yes. However, the health sector is public and under the municipal and regional authorities that hire TAW workers themselves	No
EE	There is only one, and, yes, it is affiliated to WEC-Europe		No – smaller companies with 1–49 workers are not covered. In addition, there are 6 members and, according to Estonian Statistics, the number of companies registered under NACE 78.2 is 640	No
EL	Yes, BA Hellenic Federation of Private Employment Services (ENIDEA).	No	Employers in TAW sector.	No available information
FI	Yes – HELA	No – not of the EOs solely representing TWAs	Yes	Not according to the answers received for this study, but it is possible, since TAW workers are spread out across all sectors and so is their representation
FR	YES – Prism'emploi	Not relevant	Yes	No
HR	There is no representative of the European EO in the TAW sector			

Representativeness of the European social partner organisations: Temporary agency work sector

HU				
IE	Yes – ERF		Yes	No
IT	Yes – Assolavoro	Assosomm, the second largest EO in the sector, had no data	Yes	No data
LT	Yes – LjJA		No – LjJA currently does not have microcompanies as affiliates	No
LU	Yes – FES	There is only one EO in the sector	Yes	No
LV	Yes – LPDAA	There is only one EO in the sector	Yes	No
MT	No	No	Not applicable	The MEA is affiliated to: SGI Europe BUSINESSMED - Union of Mediterranean Confederations of Enterprises
NL	If ABU is considered most important, then yes. If NBBU is considered most important, then no. They are equally important in the respondent's opinion		Yes	No
PL	Yes	Not identified	No – the PFHR does not cover TAW in construction, care and the public sector	No
PT	Yes – Apespe RH		Yes	No sectoral, national EO, or important company in the sector, that is affiliated to any other European association could be identified
RO	Yes – AFSRU	Does not apply, as there is only one BA	Yes	No
SE	Yes – KF	There is only one	Yes	No
SI	No	There is only one EO in the TAW sector	n.a.	ZAZ is part of the national Employers Association of Slovenia, which is affiliated to BusinessEurope and is a representative EO
SK	Yes – but APAS has suspended its WEC membership	N/A	N/A	No

Notes: BA, business association; EO, employer organisation.

Representativeness of the European social partner organisations: Temporary agency work sector

Table A87: Attendance at meetings of the ESSDC for TAW

	2020			2021			2022			2023		
	Meeting 1	Meeting 2	Meeting 3	Meeting 1	Meeting 2	Meeting 3	Meeting 1	Meeting 2	Meeting 3	Meeting 1 (virtual)	Meeting 2	Meeting 3
Member States where UNI Europa has members participating in the ESSDC for TAW (out of 15 Member States)	FR, IT, ES, IT, NL, DK, SE, SE, PT, PT, SE	FR, FR, IT, IT, NL, AT, IT, FI, PT, ES, AT, BE (UNI Europa) , BE (UNI Europa) , BE (UNI Europa) , SE, IT	FR, IT, ES, IT, IT, IT, AT, FI, SE, PT (plus two representatives of UNI Europa)	BE, FR, IT, ES, IT, NL, AT, FI, SE, PT, BE (UNI Europa) , BE (UNI Europa) , SE	BE, FR, IT, ES, IT, AT, BE, SE, PT, BE (UNI Europa) , BE (UNI Europa) , BE (UNI Global)	BE, FR, IT, ES, IT, AT, SE (plus two representatives of UNI Europa)	IT, ES, IT, BE, NL, PT, SE (plus one representative of UNI Europa)	FR, IT, IT, NL, IT, PT, SE (plus one representative of UNI Europa)	IT, IT, DK, BE (plus one representative of UNI Europa)	IT, ES, IT, NL, DK, FI (plus one representative of UNI Europa)	BE, IT, BE, IT, NL, DK, SE, PT, PT, SE (plus one representative of UNI Europa)	BE, BE, IT, ES, IT, NL, DK, IT, FI, PT, SE (plus two representatives of UNI Europa)
Summary of attendance at the three meetings per year	9 Member States: AT, DK, ES, FI, FR, IT, NL, PT, SE			9 Member States: AT, BE, ES, FI, FR, IT, NL, PT, SE			8 Member States: BE, DK, ES, FR, IT, NL, PT, SE			8 Member States: BE, DK, ES, FI, IT, NL, PT, SE		
Member States where UNI Europa has an affiliate but no participation in the ESSDC for TAW (out of 15 Member States)	AT, BE, BG, DE, FI, LU, LV, PL	BE, BG, DE, DK, LU, LV, PL	BE, BG, DE, DK, LU, LV, NL, PL	BG, DE, DK, LU, LV, PL	BG, DE, DK, ES, FI, LU, LV, NL, PL	BG, DE, DK, FI, LU, LV, NL, PL, PT	AT, BG, DE, DK, FI, FR, LU, LV, PL	AT, BE, BG, DE, DK, ES, FI, LU, LV, PL	AT, BG, DE, ES, FI, FR, LU, LV, NL, PL, PT, SE	AT, BE, BG, DE, FR, LU, LV, PL, PT, SE	AT, BG, DE, ES, FI, FR, LU, LV, PL	AT, BG, DE, FR, LU, LV, PL
Summary of non-attendance at the three meetings per year	6 Member States: BE, BG, DE, LU, LV, PL			6 Member States: BG, DE, DK, LU, LV, PL			7 Member States: AT, BG, DE, FI, LU, LV, PL			7 Member States: AT, BG, DE, FR, LU, LV, PL		
Member States where WEC-Europe has members participating in the ESSDC for TAW (out of 20 Member States)	ES, IT, DE, DK, IE, IE, NL, BE (WEC-Europe)	NL, ES, DE, DK, IT, SE, BE, IE, PL, FR, NL, BE (WEC-Europe)	NL, ES, DE, SE, IE, PL, FR, BE (WEC-Europe) , plus four members of multinational companies	NL, RO, ES, DE, BE, IT, SE, IE, PL, FR, NL, BE	NL, BE, ES, DE, BE, IT, SE, ES, IE, BE, FR, NL, BE (WEC-Europe)	NL, ES, DE, DK, BE, IT, SE, ES, IE, PL, FR, NL, BE (WEC-Europe)	NL, RO, ES, DE, DK, IE, IT, SE, IE, PL, FR, NL, BE (WEC-Europe)	NL, ES, DE, DK, IT, SE, IE, FR, NL, BE (WEC-Europe)	ES, DK, NL, IE, NL, BE (WEC-Europe) , plus one multinational company	NL, DE, DK, SE, SE, FR, NL, BE (WEC-Europe)	NL, RO, DE, DK, IT, SE, IE, FR, BE (WEC-Europe) , plus two members of multinational companies	NL, ES, DE, DK, IT, SE, PL, NL, BE (WEC-Europe)
Summary of attendance at the three meetings per year	10 Member States: BE, DE, DK, ES, FR, IE, IT, NL, PL, SE			11 Member States: BE, DE, DK, ES, FR, IE, IT, NL, PL, RO, SE			10 Member States: DE, DK, ES, FR, IE, IT, NL, RO, PL, SE			10 Member States: DE, DK, ES, FR, IE, IT, NL, PL, RO, SE		

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Member States where WEC-Europe has a company affiliated but no participation in the ESSDC for TAW (out of 20 Member States)	AT, BE, BG, EE, EL, FI, FR, LT, LU, LV, PL, PT, RO, SE	AT, BG, EE, EL, FI, LT, LU, LV, PT, RO	AT, BE, BG, DK, EE, EL, FI, IT, LT, LU, LV, PT, RO	AT, BG, DK, EE, EL, FI, LT, LU, LV, PT	AT, BG, DK, EE, EL, FI, LT, LU, LV, PL, PT, RO	AT, BG, EE, EL, FI, LT, LU, LV, PT	AT, BE, BG, EE, EL, FI, LT, LU, LV, PT	AT, BE, BG, EE, EL, FI, LT, LU, LV, PL, PT, RO	AT, BE, BG, DE, EE, EL, FI, FR, IT, LT, LU, LV, PL, PT, RO, SE	AT, BE, BG, EE, EL, ES, FI, IE, IT, LT, LU, LV, PL, PT, RO	AT, BE, BG, EE, EL, ES, FI, LT, LU, LV, PL, PT	AT, BE, BG, EE, EL, FI, FR, IE, LT, LU, LV, PT, RO
Summary of non-attendance at the three meetings per year	10 Member States: AT, BG, EE, EL, FI, LT, LU, LV, PT, RO			9 Member States: AT, BG, EE, EL, FI, LT, LU, LV, PT			10 Member States: AT, BE, BG, EE, EL, FI, LT, LU, LV, PT			10 Member States: AT, BE, BG, EE, EL, FI, LT, LU, LV, PT		

Source: Authors' compilation based on data from the European Commission.

Annex 2: Country pages

Austria  	People employed in the TAW sector (national data)	Proportion of the Austrian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	77 800	National data	Eurostat	759
	Note: A distinction between the number of assignments and the number of TAW workers (from both domestic and foreign companies) is made in the official Statistics Austria data collection. <i>Source: Statistics Austria.</i>	1.8 ^(a) 2.1 ^(b)	2.4 (2021) 2.4 (2022)	

(a) Based on total employment.

(b) Based on dependent employment (number of employees).

Two trade unions	There are two general trade unions organising also TAW workers in Austria, PRO-GE and the GPA, each representing a different category of workers: blue-collar and white-collar TAW workers, respectively. The largest organisation for TAW workers is PRO-GE, with TAW workers equal to one fifth of the membership base; it organises blue-collar workers across all sectors of the economy. The GPA is the second largest trade union in the sector, organising most white-collar employees in the country. Directly employed TWA workers, who are mostly white-collar workers, are also represented by the GPA. There is a separate, sector-specific collective agreement for blue-collar TAW workers; it was signed by PRO-GE and the employer organisation FVGD and has an estimated coverage rate of 80 % for TAW workers. For white-collar TAW workers, the collective agreement for employees in crafts, trades and services (which covers several sectors) applies; it was signed between the GPA and the employer organisation FVGD, plus 19 other employer organisations, and has an estimated coverage rate of 20 % for TAW workers. In Austria, the vast majority of TAW workers have a permanent (open-ended) employment contract. The share of all workers in the TAW sector covered by collective bargaining is 100 %.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Production Trade Union (PRO-GE)	10 000 (of approximately 50 000 sectoral blue-collar workers)	~ 12.85		Stable	Blue-collar workers from all sectors	Yes (mutual recognition and a legal right to collective bargaining)	Yes	Yes – for TAW members: IndustriAll Europe, EFFAT	The GPA is the only organisation affiliated to UNI Europa Agency Workers. The largest and most important trade union,

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GPA	No data	N.A.		Increasing	White-collar workers from all sectors	Yes (mutual recognition and a legal right to collective bargaining)	Yes	Yes – UNI Europa Agency Workers, UNI Europa (for other sectors)	PRO-GE, is not a member of UNI Europa Agency Workers, which means that, in Austria, only white-collar workers are represented by UNI Europa Agency Workers
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Two employer organisations	There are two employer organisation for TWAs in Austria. The largest is the FVGD, which covers companies of all sizes and undertaking all activities. Due to the mandatory membership, it covers 100 % of all companies in the sector. The second largest organisation is the voluntary ÖPDL (a business association), covering mostly large companies. The FVGD has signed two collective agreements: the collective agreement for the trade of personnel leasing, with PRO-GE, and the collective agreement for white-collar workers in crafts, trades and services, with the trade union GPA.							
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Association of the Commercial Service Providers (FVGD)	911	100 (of all TAW workers)	Increased	All sectors with TAW workers Also has sector-relatedness for NACE 78.3 (other human resources provision)	Yes (mutual recognition and a legal right to collective bargaining)	Yes (MEB)	No	Only the second largest EO, ÖPDL, is affiliated to WEC-Europe. The largest employer organisation, FVGD, is not a member of WEC-Europe. All three largest TWAs in Austria are members of ÖPDL and therefore represented indirectly at the European level, but the three companies – Trenkwalder, Manpower and Hoffmann – are also directly affiliated to the WEC.
Verband Österreichs Personaldienstleister (ÖPDL) – previously VZA	101	70 (of all TAW workers) (estimate)	Stable / slightly increased	All sectors except live performance	No	Yes (MEB)	WEC-Europe	

Representativeness of the European social partner organisations: Temporary agency work sector

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Trenkwalder Personaldienste	Multinational	Approximately 7 000	PRO-GE, GPA	FVGD, ÖPDL	MEB	No
Second largest	Manpower	Multinational	Not available	PRO-GE, GPA	FVGD, ÖPDL	MEB	Yes
Third largest	Hoffmann	Multinational	Not available	PRO-GE, GPA	FVGD, ÖPDL	MEB	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Belgium 	People employed in the TAW sector (national data)	Proportion of the Belgian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	693 077 (2021) <i>Source: Federgon, 2021.</i>	National data	Eurostat	No data
		Approximately 14.2	2.0 (2021) 1.9 (2022)	

12 trade unions	There are 12 sectoral trade union federations representing TAW workers in Belgium, organised within three confederations: ACLVB-CGSLB, ACV-CSC and ABVV-FGTB. These organisations are presented to TAW workers under their umbrella organisation (confederation), serving as one entity for TAW workers. For instance, ACV-CSC federations created Interim United, which serves as a single and more accessible point for TAW workers to consult ACV-CSC. ACV-CSC is relatively similar to ABVV-FGTB in terms of size, and both are significantly larger than the third and smallest confederation: ACLVB-CGSLB. The reason for the relatively high number of trade unions in Belgium is that they organise workers in different parts of the country. ACV-CSC Puls is based in the Dutch-speaking part of Belgium. There is a significant lack of data on the memberships of these organisations. All of the unions are engaged in collective bargaining.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Algemene Centrale der Liberale Vakbonden van België (ACLVB-CGSLB)	No data	N.A.	N.A.	No data	All sectors	Yes (mutual recognition and legal requirements)	Yes	Yes – UNI Europa Agency Workers	Both of the largest and the most representative confederations, ACV-CSC and ABVV-FGTB, are members of UNI Europa Agency Workers. The third largest, ACLVB-CGSLB, is also affiliated to UNI
ACV-CSC Puls	No data	N.A.	N.A.	No data	All sectors	Yes (mutual recognition and legal requirements)	Yes	Yes – UNI Europa Agency Workers	
ACV-CNE National Federation of White-collar Workers (ACV-CSC CNE)	No data	N.A.	N.A.	No data	All sectors	Yes (mutual recognition and legal requirements)	Yes	No data	

Representativeness of the European social partner organisations: Temporary agency work sector

ACV-CSC METEA	No data	N.A.	N.A.	No data	Metal, manufacturing	Yes (mutual recognition and legal requirements)	Yes	No data	Europa Agency Workers
ACV-CSC Food and Services	No data	N.A.	N.A.	No data	Commerce, food and drink, private services, private services, manufacturing, audiovisual, live performance	Yes (mutual recognition and legal requirements)	Yes	Yes – UNI Europa Agency Workers	
ACV-CSC Construction, Industry and Energy (ACV-CSC BIE)	5 732	No data (sensitive information)		No data	Construction, manufacturing, energy	Yes (mutual recognition and legal requirements)	Yes	Not for the sector	
ACV-CSC Transcom	No data	N.A.	N.A.	No data	Road transport, courier services, private services, communication sector	Yes (mutual recognition and legal requirements)	Yes	No data	
ABVV-FGTB Horval	No data	N.A.	N.A.	No data	Agriculture, food and drink, the general hospitality sector	Yes (mutual recognition and legal requirements)	Yes	No data	
ABVV-FGTB Belgian Federation for Blue-collar Transport Workers (ABVV-FGTB BTB)	53 000			No data	Road transport, courier services, private services, all sectors related to transportation	Yes (mutual recognition and legal requirements)	Yes	ETF	
ABVV-FGTB Metaal	No data	N.A.	N.A.	No data	Metal, manufacturing	Yes (mutual recognition and legal requirements)	Yes	No data	
ABVV-FGTB General Federation (ABVV-FGTB ACCG)	No data	N.A.	N.A.	No data	Commerce, agriculture, private services, manufacturing	Yes (mutual recognition and legal requirements)	Yes	Yes – UNI Europa Agency Workers	

Representativeness of the European social partner organisations: Temporary agency work sector

ABVV-FGTB Federation of White-collar Workers, Technicians and Professional and Managerial Staff (ABVV-FGTB BBTB-SETCA)	No data	N.A.	N.A.	No data	All sectors	Yes (mutual recognition and legal requirements)	Yes	Yes – UNI Europa Agency Workers	
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Two employer organisations	There are two employer organisations in Belgium that represent TWAs. Federgon is the largest employer organisation in the country; VBO-FEB is the second largest. Both employer organisations conclude multi-employer collective bargaining agreements with 100 % coverage for TAW workers. In general, collective bargaining coverage for TAW workers is 100 % in Belgium.							
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Federgon	Around 200	N.A.	No data	All sectors	Yes (mutual recognition and legal requirements)	Yes	Yes – WEC-Europe	The largest employer organisation, Federgon, is affiliated to WEC-Europe. Randstad, Start People and Adecco are the largest organisations in the sector based on the numbers of staff, and they are all members of Federgon
Union of Belgian Enterprises (VBO-FEB)	50	75 (proportion of the workforce of all member TWAs) (estimate)	No data	All sectors	Yes (mutual recognition and legal requirements)	Yes	Not for TAW (other: BusinessEurope)	

Largest TWAs in NACE 78.2 ^(a)	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Randstad	Multinational company,	25 000 staff; no information on	ACLBV-CGSLB, ACV-CSC Puls, ACV-CSC CNE, ACV-CSC METEA, ACV-CSC Food and Services, ACV-CSC BIE, ACV-CSC Transcom, ABVV-FGTB	Federgon, VBO-FEB	SEB and MEB	No

Representativeness of the European social partner organisations: Temporary agency work sector

		subsidiary of Randstad	the number of TAW workers	Horval, ABVV-FGTB BTB, ABVV-FGTB Metaal, ABVV-FGTB ACCG, ABVV-FGTB BBTK-SETCA			
Second largest	Start People	Multinational, subsidiary of the USG Group	10 000 staff; no information on the number of TAW workers	ACLVB-CGSLB, ACV-CSC Puls, ACV-CSC CNE, ACV-CSC METEA, ACV-CSC Food and Services, ACV-CSC BIE, ACV-CSC Transcom, ABVV-FGTB Horval, ABVV-FGTB BTB, ABVV-FGTB Metaal, ABVV-FGTB ACCG, ABVV-FGTB BBTK-SETCA	Federgon, VBO-FEB	SEB and MEB	No
Third largest	Adecco	Multinational, subsidiary of the Adecco Group	8 500 staff; no information on the number of TAW workers	ACLVB-CGSLB, ACV-CSC Puls, ACV-CSC CNE, ACV-CSC METEA, ACV-CSC Food and Services, ACV-CSC BIE, ACV-CSC Transcom, ABVV-FGTB Horval, ABVV-FGTB BTB, ABVV-FGTB Metaal, ABVV-FGTB ACCG, ABVV-FGTB BBTK-SETCA	Federgon, VBO	SEB and MEB	No

(^a) Data on / rankings of largest companies are based not on the numbers of TAW workers they employ (not available), but on the numbers of TAW internal staff.

Representativeness of the European social partner organisations: Temporary agency work sector

Bulgaria 	People employed in the TAW sector (national data)	Proportion of the Bulgarian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	4 070 (2021)	National data	Eurostat	62 (no data on multinational companies)
	Source: National Statistical Institute, 2021.	~ 0.11	N.A.	

One trade union	There are two main confederations of trade unions in Bulgaria: CITUB and CL Podkrepa. However, neither of them currently represents or has as members any TAW employees. Nevertheless, both trade union federations have made continuous attempts to attract TAW workers, but without any success. According to the trade unions, TAW workers are not interested in becoming trade union members. Of the two confederations, only one, CITUB, is included in this study, as it is a member of UNI Europa Agency Workers.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector- relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
CITUB	0	Not applicable	Not applicable	Not applicable	Not applicable	Yes	No	Yes – UNI Europa Agency Workers	CITUB is a member of UNI Europa Agency Workers. However, CITUB representatives do not participate in the ESSDC meetings because it has no TAW membership within the country yet

Two employer organisations	There are two employer organisation in the TAW sector in Bulgaria: HK3B and the BEC. Neither of them is considered representative or engaged in collective bargaining for the TAW sector. Only one organisation, HK3B, is affiliated to an EU structure. The two largest TWAs in Bulgaria (Trenkwalder and Easy Consult) are affiliated to the BEC; the third largest company, Manpower Bulgaria, is a member of HK3B.							
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Национална конфедерация по заетостта –	3	Approximately 40	Stable	Construction, metal, human health / hospitals, commerce, food and drink, courier services, public	No	No	Yes – WEC-Europe	HK3B is affiliated to WEC-Europe. However, HK3B is not considered representative for the TAW sector, and it is not involved in collective

Representativeness of the European social partner organisations: Temporary agency work sector

България (HK35)				services, private services, manufacturing, audiovisual				bargaining for TAW workers. WEC-Europe does not represent the two largest TWA companies in Bulgaria, which are affiliated to the BEC. However, ManpowerGroup is a WEC-Europe corporate member
Bulgarian Employment Confederation (BEC)	10	Approximately 50	Stable	Human health / hospitals, commerce, courier services, manufacturing	No	No	No	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Trenkwalder	Part of a multinational group (subsidiary)	1 256 (2019)	None	BEC	None	No
Second largest	Easy Consult	Part of a multinational group (subsidiary)	697 (2019)	None	BEC	None	No
Third largest	Manpower Bulgaria	Part of a multinational group (subsidiary)	695 (2019)	None	HK35	None	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Croatia 	People employed in the TAW sector (national data)	Proportion of the Croatian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	18 256 contracts	National data	Eurostat	292
	13 081 employed workers (2021) <i>Source: Ministry of Labour.</i>	1.2 (2022)	1.0 (2021) 1.3 (2022)	

No trade unions	There are no trade unions organising TAW workers in Croatia. Nevertheless, based on the estimations of the social partners, a very small number of TAW workers are members of two trade unions: the Croatian Trade Union in Telecommunication (Hrvatski sindikat telekomunikacija (HST)), with approximately 20–25 members, and the Trade Union of the Employed in Agriculture, Food and Tobacco Industry and Water Resources (Sindikat zaposlenih u poljoprivredi, prehrambenoj i duhanskoj industriji i vodoprivredi Hrvatske (PPDIV)), with about 10–15 individual members.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
—	—	—	—	—	—	—	—	—	Croatia has no affiliated trade union members of UNI Europa Agency Workers

One employer organisation	There is only one employer organisation in the TAW sector in Croatia: CEA. It is involved in the coordination of agency work and mediating by employment. CEA is not involved in any bipartite or tripartite social dialogue related to the TAW sector, as this does not take place, nor in any collective bargaining. CEA is not affiliated to WEC-Europe or any other organisation relevant to the sector.							
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Croatian Employers' Association (CEA)	17	80	Stable	All sectors	Yes (legal requirements)	No	No	CEA is not affiliated to WEC-Europe

Representativeness of the European social partner organisations: Temporary agency work sector

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Dekra zapošljavanje	Multinational, subsidiary	400	None	None	None	No
Second largest	Trenkwalder za privremeno zapošljavanje	Multinational, subsidiary	350	None	None	None	No
Third largest	Kadus	National	300	None	None	None	No

Representativeness of the European social partner organisations: Temporary agency work sector

Cyprus 	People employed in the TAW sector (national data)	Proportion of the Cypriot workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	240	National data	Eurostat	19
	Source: Business Register of Cyprus Statistical Service, 2020.	~ 0.04	N.A.	

No trade unions	TAW activities in Cyprus are extremely limited, with only 19 companies (employing about 240 workers) operating in the country. No trade union organisation for TAW workers operates in the country. As a general rule, if a company has signed a single-employer agreement or is covered by a multi-employer agreement, the agreement provides that any temporary workers are covered, for the duration of their assignment. Other than that, there is no sector-specific collective bargaining.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
—	—	—	—	—	—	—	—	—	—

No employer organisations	No employer organisation for TWAs operates in the country.								
	Member companies	Workforce of member companies	Trend	Sector- relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	
	—	—	—	—	—	—	—	—	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	No access to data						

Representativeness of the European social partner organisations: Temporary agency work sector

Second largest	No access to data						
Third largest	No access to data						

Representativeness of the European social partner organisations: Temporary agency work sector

Czechia 	People employed in the TAW sector (national data)	Proportion of the Czech workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	271 270 ^(a) (2021)	National data	Eurostat	979 (2019) – Trexima
	Source: Ministry of Labour and Social Affairs, 2021.	5 (of total workforce, but probably lower)	1.6 (2021) 2.3 (2022)	1 113 (as of 4 October 2022) – Ministry of Labour and Social Affairs

^(a) Counted as the number of employees assigned to the identified user in the year indicated (one employee can be assigned to more than one user in one year).

Three trade unions	There are no sector-specific trade unions for TAW workers in Czechia. The only trade unions that represent some TAW workers are all operating within one automotive company: Škoda Auto. The three establishment-level unions (KOVO MB, KOVO KV and KOVO VL) are not considered representative for the TAW sector and are not affiliated to any European organisation for the TAW sector.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
KOVO Mladá Boleslav (KOVO MB), KOVO Kvasiny (KOVO KV) and KOVO Vrchlabí (KOVO VL)	Approximately 2 560 in total KOVO MB – 1 700 KOVO KV – 855 KOVO VL – 170	~ 0.94 ~ 0.63 ~ 0.32 ~ 0.06		Stable	Manufacturing	No	No	No	KOVO MB, KOVO KV, KOVO VL are not affiliated to UNI Europa Agency Workers

Two employer organisations	There are two business associations in the TAW sector in Czechia: APPS and APA. The APPS is the larger, and its member companies cover approximately 23 % of the TAW workforce. The APA has 50 member companies but is estimated to be smaller than the APPS.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Association of Personal Service	30	58 900 assigned workers	Decreased	Construction, metal, road transport, manufacturing,	No	No	No	

Representativeness of the European social partner organisations: Temporary agency work sector

Providers (APPS) (business association)		(approximately 23 %)		forwarding, warehouses, logistics, production operators				Neither the APPS nor the APA is affiliated to WEC-Europe
Association of Working Agencies (APA) (business association)	50	No data	Increasing, but slowly	Construction, metal, agriculture, road transport, manufacturing, retail, accommodation services, cleaning services, collection of municipal waste	No	No	No	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Manpower ^(b)	Multinational	No data	Yes	APPS	Leader of the master vendor system in Škoda (leader of a group of TWAs that supply TAW workers to Škoda Auto and therefore has a signed collective agreement with the trade unions operating in Škoda Auto)	No data
Second largest	N.A.						
Third largest	N.A.						

^(b) A request for detailed data on the three largest companies in Czechia was refused by the Czech Statistical Office due to the confidentiality of individual company data. Therefore, data on Manpower were compiled based on the desk research, and it is not clear if this is the largest company in the sector.

Representativeness of the European social partner organisations: Temporary agency work sector

Denmark 	People employed in the TAW sector (national data)	Proportion of the Danish workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	35 768 (absolute number, 2021)	National data	Eurostat	1 090
	26 560 (full-time equivalents, 2021)	Approximately 1 (2021)	0.7 (2021)	
	<i>Source: Statistics Denmark, 2021.</i>		0.6 (2022)	

Three trade unions	There are no TAW-specific trade unions in Denmark. The most relevant unions in the sector, either with the largest share of TAW workers or due to their representation at the European level, are 3F, the Danish Nurses' Organization (DSR), HK Privat and DM. 3F is the largest organisation, representing workers in six sectoral groups from the construction, agriculture, food and drink, road transport, private services and manufacturing sectors. HK Privat is another key trade union, with a number of TAW workers, which traditionally organises salaried clerical employees (administration, human resources, etc.) in all sectors. DM organises academic professionals across several sectors. According to the national data, the highest number of annual hours sold by TAW workers is to the human health / hospitals sector (31.15 %). There are two additional trade unions organising some TAW workers in this sector: the DSR and Trade and Labour (Fag og Arbejde (FOA)). However, due to a lack of available information and data, they were not included in the study. Collective agreements in the TAW sector are cross-cutting/transversal and cover both temporary workers and permanently employed workers. The largest agreement in the Danish private sector, the multi-employer industrial agreement, was signed between the Central Organization of Industrial Employees in Denmark (CO-industri) and DI; it covers approximately 96 % of TAW workers. 3F signed a multi-bargaining collective agreement, the construction agreement, with DI, which covers approximately 90 % of TAW workers. In general, almost all TAW workers in Denmark are covered by existing collective agreements: the collective bargaining coverage rate is estimated at 90 %.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa
United Federation of Danish Workers (3F)	1 300	~ 3.63	0.5 (of around 262 339 members)	Stable	Construction, agriculture, food and drink, road transport, courier services, private services, manufacturing	Yes (mutual recognition)	Yes	Not for TAW	The most important trade union in TAW – 3F – is not affiliated to UNI Europa for TAW.

Representativeness of the European social partner organisations: Temporary agency work sector

HK Privat	Approximately 500	~ 1.40	0.6 (of around 90 000 members)	Stable	All sectors	Yes (mutual recognition)	Yes	Yes – UNI Europa Agency Workers (for TAW workers who are directly employed staff: UNI-ICTS)	Only HK Privat is affiliated to UNI Europa Agency Workers. DM was a member of UNI Europa Agency Workers until spring 2023 and has not been affiliated to any European organisation since
Danish Association of Masters and PhDs (DM)	N.A.	N.A.	N.A.	Increasing	The entire public sector, pharmaceuticals, information technology, publishing, culture, sports, media, utilities, consulting and advisory, education and training, transportation, non-governmental organisations, interest groups	Yes (mutual recognition)	No	No (member of UNI Europa Agency Workers until 31 December 2023)	

Three employer organisations / business associations	The TAW sector in Denmark is very organised. Most companies are members of employer organisations, which means that they have collective agreements negotiated by the organisation on their behalf. There are three relevant employer organisations: Dansk Erhverv is the largest organisation, with a stable membership of 172 member companies, covering 45 % of the sectoral workforce. DI is the second largest employer organisation, with 128 member companies but increasing membership. Both organisations engage in collective bargaining and conclude sector-specific collective agreements, applicable to both TAW workers (working under the collective agreement of the user company) and regular employees, with no differences in terms. VB, which is an independent association under Dansk Erhverv, has 24 member companies and signs its own collective agreements.								
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	

Representativeness of the European social partner organisations: Temporary agency work sector

Dansk Erhverv	172	45 (estimate)	Stable	Construction, metal, human health / hospitals, education, commerce, food and drink, road transport, courier services, public services, private services, audiovisual, live performance	Yes (mutual recognition)	Yes	Yes – WEC-Europe	The largest organisation in Denmark – Dansk Erhverv – covers approximately 45 % of the TAW workforce and is affiliated to WEC-Europe. DI is not affiliated to WEC-Europe. VB is indirectly represented in WEC-Europe via its affiliation to Dansk Erhverv. The largest TWA in Denmark (JKS) is not a member of Dansk Erhverv and, hence, is not represented in WEC-Europe. The second and third largest companies are both affiliated to Dansk Erhverv and, hence, are indirectly represented by WEC-Europe
Dansk Industri (DI)	128	Less than 50 (and less than Dansk Erhverv, estimate)	Increased	Construction, metal, commerce, agriculture, food and drink, road transport, courier services, public services, education, private services, manufacturing	Yes (mutual recognition)	Yes (MEB)	No	
Federation of Staffing Agencies in Denmark (VB)	24	N.A., but members are included in the 45 % for Dansk Erhverv, of which VB is a business association	Stable	Construction, metal, human education, commerce, food and drink, road transport, courier services, public services, private services, audiovisual, live performance	Yes (mutual recognition)	Yes	No (but indirectly via Dansk Erhverv)	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	JKS	National	Total staff as of May 2023: 6 401 Directly employed staff in TWAs: 195	N/A	DI	MEB	No
Second largest	Moment	Multinational, subsidiary of Edda Group	Total staff as of May 2023: 5 787	N/A	DI and VB (and thus Dansk Erhverv)	MEB	No

Representativeness of the European social partner organisations: Temporary agency work sector

			Directly employed staff in TWAs: approximately 200				
Third largest	Carelink	National	Total staff as of May 2023: 4 255 No data on directly employed staff	DSR, FOA, Association of Child and Youth Educators (BUPL)	Dansk Erhverv	MEB	No

Representativeness of the European social partner organisations: Temporary agency work sector

Estonia 	People employed in the TAW sector (national data)	Proportion of the Estonian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	7 177	National data	Eurostat	620
	Notes: This number includes employees of NACE 78.2. The national statistics do not differentiate between TAW workers and internal employees of the agency. <i>Source:</i> Estonian Business Directory.	Estimation: 1 (2022)	N.A.	

No trade unions	There are no trade unions specifically for TAW workers in Estonia. TAW workers can join other trade unions, but there is no evidence that any trade unions have made efforts to recruit TAW workers.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
—	—	—	—	—	—	—	—	—	—

One employer organisation	There is only one employer organisation in the TAW sector in Estonia. There are no bipartite or tripartite social dialogue bodies specific to the TAW sector, but EPREL is a member of the Estonian Employers' Confederation and Estonian Service Industry Association. The organisation is not involved in collective bargaining. EPREL is a member of WEC-Europe.								
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	
Eesti Personalitöövõtete Liit (EPREL)	6	1 000	Has been stable	Commerce, food and drink, public services, private services, manufacturing, ICT, finance, etc.	No national definitions/rules	No	Yes – WEC-Europe	The only representative employer organisation is affiliated to WEC-Europe. The largest TWA in Estonia – Finesta – is a member of EPREL	

Representativeness of the European social partner organisations: Temporary agency work sector

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Finesta	Multinational, parent	391 (TAW workers) to 750+ (internal employees)	N/A	EPREL	N/A	No
Second largest	Humanlink Estonia	Multinational	353 internal employees	N/A	Not a member	N/A	No
Third largest	Euro Work	Multinational, subsidiary	228 internal employees	N/A	Not a member	N/A	No

Representativeness of the European social partner organisations: Temporary agency work sector

Finland 	People employed in the TAW sector (national data)	Proportion of the Finish workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	Approximately 60 000 (2022)	National data	Eurostat	1 745
	62 000 (2023) <i>Source: Statistics Finland.</i>	2.7 (2022)	2.0 (2021) 2.7 (2022)	

Three trade unions (selection of most representative)	There is no TAW-specific trade union in Finland, but several sectoral trade unions represent TAW workers as well as other employees. The largest, with approximately 8 000 TAW members, is PAM, which is also affiliated to UNI Europa Agency Workers. Among the other sectoral unions with TAW members, ERTO is another key player, since it negotiated a collective agreement that covers only TAW workers with the employer organisation HELA. The union representing the largest part of the remaining TAW workers is Teollisuusliitto. All three unions – PAM, ERTO and Teollisuusliitto – negotiate collective agreements that are not specific to TAW workers, but cover all workers, including TAW workers. At least 60 % of white-collar workers are covered by a collective agreement, according to HELA.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Service Union United (PAM)	8 000	~ 13.3		Increasing	Retail and wholesale trade, security sector, accommodation and food services sector, property management sector	Yes (mutual recognition; but not specifically for the TAW sector)	No	Yes – UNI Europa Agency Workers	Only one union, PAM, is affiliated to UNI Europa Agency Workers. PAM organises workers in all three of the largest TWAs
Union of Private Sector Professionals (ERTO)	No current numbers available; 214 in 2002	N.A.	N.A.	No data	Private sector	Yes (mutual recognition; both for TAW and other sectors)	Yes	No	
Industrial Union (Teollisuusliitto)	3 130	~ 5.2		Increasing	Metal, agriculture, private services, manufacturing,	Yes (mutual recognition; but	No (But yes for	No	

Representativeness of the European social partner organisations: Temporary agency work sector

					chemical industry, wood products industry, other sectors	not specifically for the TAW sector)	other sectors)		
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Two employer organisations	The largest employer organisation in the TAW sector is HELA, with 420 member companies. HELA participates in several bipartite or tripartite social dialogue bodies for the sector (working groups) and concludes a MEB collective agreement for the personnel sector with ERTO. The second largest EO is PALTA.							
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Henkilöstöala HELA ry) (HELA) (formerly HPL)	About 420	About 60	Increased	All sectors	Yes (mutual recognition)	Yes	Yes – WEC-Europe	The largest organisation, HELA, is affiliated to WEC-Europe. The largest TWA, Barona, and the third largest TWA, Staffpoint, are both members of HELA and, hence, represented in WEC-Europe
Palvelualojen työntajat PALTA ry (PALTA)	About 24 (or 60–80 if single units of business groups counted)	Less than 40	Increased	Construction, metal, commerce, road transport, courier services, private services, manufacturing, logistics, banking and insurance, ICT, security, railway, aviation, postal services, financial management, content sector	Yes (mutual recognition)	Yes	No	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Barona	Multinational, parent company	12 600 ^(a) (both TAW workers and internal staff)	Depends on the sector. For example, PAM covers TAW in the services sector, while Teollisuusliitto covers the industry sector; the trade union PRO also has employee members at the company	HELA	MEB with an extension mechanism (one such extension is for office workers)	No

Representativeness of the European social partner organisations: Temporary agency work sector

Second largest	Eezy	National	Approximately 32 000 TAW workers a year (unconfirmed estimate)	Depends on the sector. For example, PAM covers TAW in the services sector, while Teollisuusliitto covers the industry sector	PALTA	Both MEB and MEB with an extension mechanism	No
Third largest	Staffpoint	National	14 300	Depends on the sector. For example, PAM covers TAW in the services sector, while Teollisuusliitto covers the industry sector	HELA	Both MEB and MEB with an extension mechanism	No

(^a) Barona has more full-time employees than Staffpoint; therefore, Barona is listed as the largest TWA in the sector.

Representativeness of the European social partner organisations: Temporary agency work sector

France 	People employed in the TAW sector (national data)	Proportion of the French workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	787 782 TAW workers / 797 851 TAW workers in EFT (Directorate of Research, Economic Studies and Statistics, 2023)	National data	Eurostat	8 375 (National Institute of Economic Studies and Statistics)
	824 859 TAW workers in EFT (Prism'emploi, 2022) About 30 000 permanent directly employed workers in TWAs	3 (of all salaried employees) (2021)	2.7 (2021) 2.7 (2022)	11 726 TWAs and 2 000 companies (companies may cover several agencies) (Prism'emploi, 2022)

Six trade unions	There are six trade union organisations in France that organise permanent employees of TWAs and TAW workers and are also recognised as representative for the TAW sector at the national level. The largest is CGT Intérim, which organises TAW workers in all sectors of the economy; the second largest confederation is FS-CFDT. The smallest organisation in terms of TAW membership is UNSA FCS. These federations do not directly engage in collective bargaining for the sectors that use TAW workers. They are only involved in collective bargaining with the employer organisation of the TWAs (Prism'emploi) at the branch level and with the employers of this sector at the company level. In general, TAW workers are covered by the collective agreements of the user company. There are also two large agreements in the TAW sector, which apply to both permanent employees and TAW workers: the agreement on the reinforcement of paritarianism and social dialogue in the temporary work branch (extended) and the agreement relating to the creation of a compulsory conventional training contribution in the temporary work branch, signed between Prism'emploi and all six organisations (CGT Intérim, UNSA FCS, CFTC – CSFV, FS-CFDT, FEC FO, CFE-CGC SNES). The estimated coverage rate of both agreements is 100 %.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
General Confederation of Labour – Interim (CGT Intérim)	Data available, but confidential	N.A. Weight in terms of representativeness at the national level: 28.44	N.A.	Increasing	All sectors	Yes (legal requirements)	Yes (MEB and SEB for the TAW sector's employees – both permanent and, to some	Yes – UNI Europa Agency Workers	Four confederations are affiliated to UNI Europa Agency Workers: CGT Intérim, FS-CFDT, CFTC – CSFV and FEC FO. All three of the largest TWAs in France – Adecco,

Representativeness of the European social partner organisations: Temporary agency work sector

							extent, TAW workers on assignment)		Manpower and Randstad – have some of their workers affiliated to these three unions and, hence, are represented by UNI Europa Agency Workers
French Democratic Labour Confederation – Services Federation (FS-CFDT)	12 300 (2022)	Weight in terms of representativeness at the national level: 22.32	~ 15.4 (80 000 members in total)	Increasing (11 300 in 2020)	All sectors	Yes (legal requirements)	Yes (MEB and SEB for the TAW sector's employees – both permanent and, to some extent, TAW workers on assignment)	Yes – UNI Europa Agency Workers	
French Confederation of Christian Workers – CSFV (CFTC – CSFV)	N.A.	N.A. Weight in terms of representativeness at the national level: 14.34	N.A.	N.A.	All sectors	Yes (legal requirements)	Yes (MEB and SEB for the TAW sector's employees – both permanent and, to some extent, TAW workers on assignment)	Yes – UNI Europa Agency Workers	
French Managers' Confederation – French General Managers' Confederation – Retail and services – Syndicat National de l'Encadrement et des	10–20	Weight in terms of representativeness at the national level: 13.96	N.A.	Stable	All sectors	Yes (legal requirements)	Yes (MEB and SEB for the TAW sector's employees – both permanent and, to some extent, TAW	No (but indirectly a member of CEC European Managers through the	

Representativeness of the European social partner organisations: Temporary agency work sector

Services (CFE-CGC SNES)							workers on assignment)	confederation CFE-CGC)	
Employees and Managers' Federation – General Confederation of Labour – Force Ouvrière (CGT-FO) (FEC FO)	800–1 200 (expert estimation)	Weight in terms of representativeness at the national level: 10.89	N.A.	Increasing	All sectors	Yes (legal requirements)	Yes (MEB and SEB for the TAW sector's employees – both permanent and, to some extent, TAW workers on assignment)	Yes – UNI Europa Agency Workers	
National Union of Autonomous Trade Unions – Trade and Services Federation (UNSA FCS)	N.A. (sensitive data)	N.A. Weight in terms of representativeness at the national level: 10.05	N.A.	Increasing	All sectors	Yes (legal requirements)	No (only in some companies)	No	

One employer organisation	Due to the prevalence of larger companies – which are all members of the single employer organisation, Prism'emploi – the TAW sector in France is very organised, with an estimation of 95 % workforce coverage in the organisation's member companies.							
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Prism'emploi	600	95	Increased	All sectors	Yes (legal requirements)	Yes (MEB)	Yes – WEC-Europe	Prism'emploi is a member of WEC-Europe. All three of the largest TWAs in France – Adecco, Manpower and Randstad – are members of Prism'emploi and, hence, represented in WEC-Europe

Representativeness of the European social partner organisations: Temporary agency work sector

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Adecco	Multinational	9 000 permanent employees; 430 000 TAW workers in 2022	CFDT, CFTC, CFE-CGC, CGT, UNSA, CGT-FO	Prism'emploi	SEB and MEB	Yes
Second largest	Manpower	Multinational	3 950 permanent employees; 80 000 TAW workers per week	CFDT, CFTC, CFE-CGC, CGT, UNSA	Prism'emploi	SEB and MEB	Yes
Third largest	Randstad	Multinational	1 500 permanent employees; 85 000 TAW workers per week	CFDT, CFTC, CFE-CGC, CGT, CGT-FO	Prism'emploi	SEB and MEB	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Germany 	People employed in the TAW sector (national data)	Proportion of the German workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	815 880 (2021)	National data	Eurostat	47 769
	Source: Federal Employment Agency, 2021.	2.1 (of all employees liable for social security contributions and marginal employees) (2021)	2.8 (2021) 3.3 (2022)	

Three (largest) trade unions	In Germany, TAW workers are represented and organised according to the sector in which they work. The three largest sectoral unions organising TAW workers, in order, are IG Metall, ver.di and IG BCE. IG Metall is the largest organisation for TAW workers, as most work is in the manufacturing sector. The following trade unions also represent some TAW workers: Gewerkschaft Erziehung und Wissenschaft (GEW); Industriegewerkschaft Bauen-Agrar-Umwelt (IG BAU); Gewerkschaft der Politzzei (GDP); Eisenbahn- und Verkehrsgewerkschaft (EVG); and Gewerkschaft Nahrung-Genuss-Gaststätten (NGG). The DGB is an umbrella organisation representing eight sectoral member unions for collective bargaining in TAW sector. The DGB has concluded a sector-level collective agreement (with eight of the abovementioned unions as signatory parties) with two employer organisations – BAP and IGZ – which covers approximately all TAW workers (100 %) and regulates their pay (among other things), including the minimum pay rates. In addition, DGB member unions concluded agreements regulating bonus payments for TAW workers in 11 sectors (e.g. for the metal, chemical, textile and clothing industries) with BAP and IGZ.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Industrial Union of Metalworkers (IG Metall)	40 000	N.A.	1.8	Fluctuating	Metal, manufacturing (possibly from other sectors organised by IG Metall / covered by the collective agreement negotiated by IG Metall)	Yes (mutual recognition)	Yes	Yes – IndustriAll (other workers: EFBWW)	Only the second largest union, ver.di, is a member of UNI Europa Agency Workers. The union that organises most TAW workers, IG Metall, is not
United Services Trade Union (ver.di)	6 000+	~ 0.74	0.3	Temporarily decreasing membershi	Human health / hospitals, education, commerce, road transport, courier services,	Yes (mutual recognition)	Yes	Yes – UNI Europa Agency Workers (other workers:	

Representativeness of the European social partner organisations: Temporary agency work sector

				p during COVID-19, but otherwise stable'	public services, private services, audiovisual, live performance (but it de facto also has a few members from other non-service-related sectors)			UNI Europa, EPSU, ETF, EJJ)	affiliated to WEC-Europe but is affiliated to IndustriAll. The third largest trade union for TAW workers, IG BCE, is affiliated to IndustriAll
Industrial Union Mining, Chemistry, Energy (IG BCE)	Roughly 2 500	N.A.	0.4	Increasing	Manufacturing	Yes (mutual recognition)	Yes	Yes – IndustriAll	

Two employer organisations (merged into one organisation in 2023)	There are two employer organisations for TAW workers in Germany: BAP and IGZ. Both BAP and IGZ conclude the sectoral collective agreement for TAW and sectoral agreements in other sectors with the trade union confederation DGB, regulating some aspects of temporary work (as described earlier). In 2023, a merger of BAP and IGZ was agreed, and it was in the implementation phase during this study. A new, merged federation under the name GVP became operational in December 2023.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Bundesarbeitgeberverband der Personaldienstleister (BAP) (initiated merger into the GVP)	Nearly 1 600	No up-to-date data available	Stable	Metal, human health / hospitals, commerce, food and drink, road transport, public services, manufacturing, logistics, the chemical industry, the printing industry, railways, the paper-, cardboard- and plastic-processing industry, the textile and clothing industry, the wood- and plastic-processing industry, potash and rock salt mining, the rubber industry	Yes (mutual recognition)	Yes	Yes – WEC-Europe	The largest EO in the TAW sector – IGZ – is not a member of WEC-Europe. The second largest employer organisation in Germany, BAP, is affiliated to WEC-Europe. However, in 2023, these two organisations initiated a merger into one organisation: the GVP. The

Representativeness of the European social partner organisations: Temporary agency work sector

Association of German Temporary Employment Agencies (IGZ) (initiated merger into the GVP)	3 778	310 000 TAW workers (share of approximately 38 %)	Increased	Metal, human health / hospitals, education, commerce, private services, manufacturing, the chemical industry, the printing industry, the wood- and plastic-processing industry, the rubber industry, railways, the textile and clothing industry, public administration, banking and insurance, electricity supply, information technology and telecommunications, the paper-, cardboard- and plastic-processing industry	Yes (mutual recognition)	Yes (MEB)	No	two largest TWAs in Germany, Randstad Deutschland and Adecco Germany Holding, are members of BAP and, hence, indirectly represented by WEC-Europe. Both companies are also listed as corporate WEC members. The third largest company, Persona Service, is affiliated to IGZ
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Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Randstad Deutschland	Parent company is from the Netherlands	36 000 TAW workers in 2020	Collective agreements are concluded by the DGB. In principle, TAW workers are organised by the competent union in the sector in which they work	BAP	MEB	Randstad is listed as a corporate WEC member
Second largest	Adecco Germany Holding	Parent company is from Switzerland	26 674 TAW workers in 2020	Collective agreements are concluded by the DGB. In principle, TAW workers are organised by the competent union in the sector in which they work	BAP	MEB	Adecco is listed as a corporate WEC member

Representativeness of the European social partner organisations: Temporary agency work sector

Third largest	Persona Service	German company	13 016 TAW workers in 2020	Collective agreements are concluded by the DGB. In principle, TAW workers are organised by the competent union in the sector in which they work	IGZ	MEB	No information
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Representativeness of the European social partner organisations: Temporary agency work sector

Greece 	People employed in the TAW sector (national data)	Proportion of the Greek workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	15 800	National data	Eurostat	44
	Source: Hellenic Statistical Authority, 2022.	0.3 (of the total number of employees in Greece) (2020)	16.3 (2021) ⁽⁵²⁾ 0.6 (2022)	

No trade unions	There are no trade unions organising TAW workers in Greece. Some attempts at their organisation came from the Pan-Hellenic Union of Employees Providing Labour to Third Parties (Pasypet) or the Union of Rented Personnel in Banking Sector but were short-lived and unsuccessful (both organisations dissolved). Overall, there has been limited public debate on the subject of TAW in Greece, and collective organisation or trade unionism among TAW workers is very limited.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
—	—	—	—	—	—	—	—	—	—

One employer organisation	There is only one business association in the TAW sector in Greece: Ενιδεα. It covers 11 companies from the TAW sector. It is considered not an employer organisation, but an association whose objective is to inform public opinion and promote TAW in Greece. It is not involved in any bipartite or tripartite social dialogue related to the TAW sector, or collective bargaining. It is recognised as a social partner affiliated to WEC-Europe.								
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	
Ένωση Ιδιωτικών Εταιρειών Απασχόλησης (Ενιδεα)	11	N.A.	No data	All industry	Yes (mutual recognition)	No	Yes – WEC-Europe	The only representative business association in Greece – Ενιδεα – is affiliated to WEC-Europe	

⁽⁵²⁾ Break in time series.

Representativeness of the European social partner organisations: Temporary agency work sector

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
N.A.							
N.A.							
N.A.							

Representativeness of the European social partner organisations: Temporary agency work sector

Hungary  	People employed in the TAW sector (national data)	Proportion of the Hungarian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	217 707 (2021) – 136 500 permanent contracts and 81 207 fixed-term contracts <i>Source: National Employment Service.</i>	National data	Eurostat	580
		4.7 (of total employed) 2.9 (of those with a permanent contract)	0.4 (2021) 0.5 (2022)	

Two trade unions	There are two trade unions in Hungary organising some TAW workers. The largest is Vasas; the second largest is BDSZ (section for the light industry sector). Vasas is not involved in collective bargaining, but some multilateral dialogue is ongoing with other trade unions to increase transparency in the TAW sector and align TAW with other types of employment. There are no collective agreements in the sector.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Confederation of Metal Workers (Vasas)	1 500– 1 600	~ 1.10 to 1.17		Increasing	Metal, manufacturing	No (but representative for metalworkers)	No	No	Neither of the two unions representing TAW workers in Hungary are affiliated to UNI Europa Agency Workers
Trade Union of Mine, Energy and Industrial Workers (BDSZ)	90–100	~ 0.07		Increasing	Manufacturing	No (but representative for metalworkers)	No	No	

Two employer organisations (one business association and one interest association)	There are two employer organisations for TWAs in Hungary. The larger, whose member companies cover approximately 66 % of TAW workers, is a business association: MMOSZ. Diákész represents 70 % of student enterprises in multiple sectors in Hungary. At the national level, MMOSZ is a member of the National Association of Entrepreneurs and Employers (VOSZ) and the Confederation of Hungarian Employers and Industrialists (MGYOSZ). Diákész participates in the National Economic and Social Council.
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Representativeness of the European social partner organisations: Temporary agency work sector

	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Magyar Munkaerő-kölcsönzők Országos Szövetsége (MMOSZ)	21	Estimated 66	Increased	Construction, metal, human health / hospitals, education, commerce, agriculture, food and drink, road transport, courier services, public services, manufacturing, administrative support	No	No	No	Neither of the two organisations are affiliated to WEC-Europe
Magyarországi Diák vállalkozások Országos Érdekképviselői Szövetsége (Diákész)	16	70 (100 000 students)	Increased	Metal, commerce, agriculture, food and drink, courier services, public services, manufacturing, the administrative support sector, entertainment (films)	No – but participates in the National Economic and Social Council	No	No	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Prohumán 2004	National	7 345 (March 2023)	No trade union	MMOSZ	—	—
Second largest	WHC	National	5 470 (March 2023)	No trade union	MMOSZ	—	—
Third largest	Work Force	National	3 049 (March 2023)	No trade union	No employer organisation affiliation	—	—

Representativeness of the European social partner organisations: Temporary agency work sector

Ireland  	People employed in the TAW sector (national data)	Proportion of the Irish workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	76 700 (2021)	National data	Eurostat	450
	Source: Central Statistics Office.	Approximately 3 (2021)	2.5 (2021) 3.7 (2022)	

One trade union	No trade union exclusively represents TAW workers in Ireland. There is one sectoral union in Ireland that represents some temporary workers: SIPTU. However, data on its representation of TAW workers are not available.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Services, Industrial Professional Technical Union (SIPTU)	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	UNI Europa Agency Workers has no trade union members from Ireland

One employer organisation	There is only one employer organisation in the TAW sector in Ireland: the ERF. It represents 95 % of the turnover of recruitment agencies in Ireland (self-reported information). The ERF is not involved in any bipartite or tripartite social dialogue bodies related to the TAW sector and does not conclude collective agreements. The organisation is a member of WEC-Europe.								
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	
Employment and Recruitment Federation (ERF)	Over 200 (of 450)	N.A.	Increased	All sectors	Yes (mutual recognition)	No	Yes – WEC-Europe	The only representative employer organisation is affiliated to WEC-Europe. Two of the three largest TWAs in Ireland – CPL and Staffline / Grafton Recruitment – are members of the ERF. These agencies are not exclusively for TAW; they provide general recruitment services	

Representativeness of the European social partner organisations: Temporary agency work sector

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Staffline / Grafton Recruitment	Multinational, subsidiary	14 000		ERF	NA	Affiliated through membership of ERF
Second largest	CPL	Multinational, subsidiary	13 000		ERF	NA	Affiliated through membership of ERF
Third largest	Morgan McKinley	Multinational, parent	N.A. (but 300 estimate)		ERF	NA	Affiliated through membership of ERF
Italy 		People employed in the TAW sector (national data)		Proportion of the Italian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)	
		515 000 (monthly average, 2022)		National data		Eurostat	
		Source: Assolavoro.		2 (2021)		1.1 (2021)	
				2.2 (2022)		1 (2022)	

Six trade unions	There are six trade unions covering the TAW sector in Italy. NIDIL CGIL / Filcams CGIL, FELSA CISL / FIRST CISL and Uiltucs are the largest in the sector. Three unions organise the (directly employed) workers of TWAs: Filcams CGIL, FIRST CISL and Uiltucs. Based on mutual recognition, all six trade unions are considered representative. At least three unions (NIDIL CGIL, FELSA CISL and Uiltemp) are engaged in collective bargaining for the TAW sector and sign SEB and MEB agreements with Assolavoro and Assosomm. In 2019, the labour supply agencies collective agreement was signed among FELSA CISL, NIDIL CGIL, Uiltemp and Assolavoro. The same agreement was signed among NIDIL CGIL, FELSA CISL, Uiltemp and Assosomm. At least four trade unions (NIDIL CGIL, FELSA CISL, Filcams CGIL and FIST CISL) are members of UNI Europa Agency Workers. For the purposes of this study, all six unions are considered members of UNI Europa Agency Workers (although membership has not been confirmed for all of them)								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers

Representativeness of the European social partner organisations: Temporary agency work sector

New Identities of Work in the Italian General Confederation of Labour (NIDIL CGIL)	No data (among the three largest)			No data	All sectors (including sport)	Yes (mutual recognition)	Yes	Yes – UNI Europa Agency Workers	All six trade unions are members of UNI Europa Agency Workers, although Uiltemp and FIRST CISL have not confirmed their membership. The three (estimated) largest trade unions in the sector are members of UNI Europa Agency Workers: NIDIL CGIL, FELSA CISL and Uiltucs. The three largest TWAs in Italy (Adecco Italia, Randstad Italia, GI Group) have temporary workers organised in the three trade unions belonging to UNI Europa Agency Workers. The directly employed workers are organised by Filcams CGIL, FIRST CISL and Uiltucs
Italian Federation of Commerce, Tourism and Services Workers in the Italian General Confederation of Labour (Filcams CGIL)	No data			No data	All	Yes (mutual recognition)	Yes for at least one type of bargaining	Yes – UNI Europa Agency Workers	
Federation of Self-employed and Atypical Workers in the Italian Confederation of Workers' Unions (FELSA CISL)	No data (among the three largest)			No data	All (including sport)	Yes (mutual recognition)	Yes	Yes – UNI Europa Agency Workers (not listed as a member by UNI Europa Agency Workers)	
Italian Confederation of Tertiary Trade Unions in the Italian Confederation of Workers' Unions (FIRST CISL)	No data			No data	All	Yes (mutual recognition)	No data	Yes – UNI Europa Agency Workers (not confirmed at the	

Representativeness of the European social partner organisations: Temporary agency work sector

								national level)	
Temporary Autonomous Atypical Workers in the Italian Union of Labour (Uiltemp)	No data			N.A.	All	Yes (mutual recognition)	Yes	Yes – UNI Europa Agency Workers (not confirmed at the national level)	
Italian Union of Tourism Trade Workers (Uiltucs)	No data (among the three largest)			No data	All (including sport)	Yes (mutual recognition)	No data	Yes – UNI Europa Agency Workers	

Representativeness of the European social partner organisations: Temporary agency work sector

Two employer organisations	There are two employer organisation in the TAW sector in Italy. Assolavoro negotiates single-employer and multi-employer collective agreements for TAW workers. It is the most important social partner, since it has more than 50 members, accounting for the largest part (more than 85 %) of the sector's total turnover. Assolavoro represents workers across the entire human resources services supply chain, as it also includes other organisations such as training companies (29) and companies that provide specialised human resources services (43). In total, therefore, Assolavoro represents 125 members. Assolavoro is also a member of WEC-Europe. Assolavoro participated in the foundation of, and is currently a member of, two bilateral bodies that provide training, economic support and welfare services to workers: the National Bilateral Agency for Temporary Work (Ente Bilaterale Nazionale per il Lavoro Temporaneo (Ebitemp)) and the Fund for Training and Income Support for Temporary Workers (Fondo per la formazione e il sostegno al reddito dei lavoratori in somministrazione (Forma.Temp)). Assosomm organises 47, mostly large, TWAs and is a member of two paritarian organisations: Ebitemp and Forma.Temp.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Associazione Nazionale di Categoria delle Agenzie per il Lavoro (Assolavoro)	More than 50 (plus 29 training companies and 43 specialised human resources services companies)	Estimated employment of over 500 000 workers in July 2023 (administrative data from Forma.Temp) plus 15 000 (plus direct employment of 15 000 workers in 2 500 branches throughout the country)	Increased	All sectors	Yes (mutual recognition)	Yes (both SEB and MEB)	Yes – WEC-Europe	Assolavoro is affiliated to WEC-Europe. All three of the largest TWAs in Italy are members of Assolavoro. Assosomm is not a member of WEC-Europe. Adecco, Randstad and GI Group are WEC-Europe corporate members
Associazione Italiana delle Agenzie per il Lavoro (Assosomm)	47	N.A.	No data	All sectors	Yes (mutual recognition)	No data	No data	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Adecco Italia	Multinational, subsidiary	50 000	FELSA CISL, NIDIL CGIL, Uiltemp	Assolavoro	MEB	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Second largest	Randstad Italy	Multinational, subsidiary	40 000	FELSA CISL, NIDIL CGIL, Uiltemp	Assolavoro	MEB	Yes
Third largest	GI Group	Multinational, subsidiary	35 000	FELSA CISL, NIDIL CGIL, Uiltemp	Assolavoro	MEB	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Latvia  	People employed in the TAW sector (national data)	Proportion of the Latvian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	2 391 (2021)	National data	Eurostat	175
	Source: Central Statistical Bureau of Latvia, 2021.	N.A.	3.3 (2021) 4.8 (2022)	

One trade union	There are no sector-specific trade unions for TAW workers in Latvia. However, the LKDAF is affiliated to UNI Europa Agency Workers, but none of its current members are TAW workers.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Trade Union of Culture Sector of Latvia (LKDAF)	0	0	0	N.A. (no members)	N.A.	No	No	Yes – UNI Europa Agency Workers and UNI Europa Media, Entertainment and Arts (graphical sector)	LKDAF is affiliated to UNI Europa Agency Workers. There are no trade unions covering the three largest TWAs in Latvia, whose workers are therefore not represented at the EU level

One employer organisation	There is only one employer organisation in the TAW sector in Latvia. The LPDAA is not involved in any bipartite or tripartite social dialogue related to the TAW sector; it is not involved in collective bargaining. The LPDAA is affiliated to WEC-Europe.								
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	
Latvijas Pagaidu darba aģentūru asociācija (LPDAA)	3	50	Stable	No data	Most likely yes (estimate, as there is no social dialogue)	No	Yes – WEC-Europe	The only representative employer organisation in Latvia – LPDAA – is affiliated to WEC-Europe. All three of the largest TWAs are members of LPDAA. Manpower is a WEC-Europe corporate member	

Representativeness of the European social partner organisations: Temporary agency work sector

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Biuro	Multinational, subsidiary	593	None	LPDAA	None	No
Second largest	Manpower Lit	Multinational, subsidiary	~ 500	None	LPDAA	None	Yes
Third largest	Simplika	Multinational, subsidiary	220	None	LPDAA	None	No

Representativeness of the European social partner organisations: Temporary agency work sector

Lithuania 	People employed in the TAW sector (national data)	Proportion of the Lithuanian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	9 392 (2021)	National data	Eurostat	193 (1 January 2023)
	<i>Source:</i> Statistics Lithuania, number of employees in NACE 78.2.	0.7 (2021)	0.9 (2021) 0.7 (2022)	

No trade unions	There are no trade unions organising TAW workers in Lithuania. The main reasons, according to the union representatives from other sectors, are the low union density of TAW workers among all employees and their unwillingness to join the unions.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
—	—	—	—	—	—	—	—	—	TAW workers from Lithuania have no representation at the EU level

One employer organisation	There is only one employer organisation in the TAW sector in Lithuania. LjJA is considered representative based on mutual recognition. LjJA is not involved in bipartite or tripartite social dialogue related to the TAW activities or collective bargaining but is represented in the Tripartite Council of the Republic of Lithuania. LjJA is affiliated to WEC-Europe.								
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	
Lietuvos įdarbinimo įmonių asociacija (LjJA)	7	Approximately 30–45	Decreased	Metal, commerce, food and drink, road transport, courier services, private services, manufacturing	Yes (mutual recognition)	No	Yes – WEC-Europe	The only representative employer organisation is affiliated to WEC-Europe. The two largest TWAs in Lithuania are members of LjJA	

Representativeness of the European social partner organisations: Temporary agency work sector

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Headex Group	Multinational, subsidiary	2 300	—	LJJA	None	No
Second largest	Biuro	Multinational, parent	1 400	—	LJJA	None	No
Third largest	Litpark	National	860	—	—	None	No

Representativeness of the European social partner organisations: Temporary agency work sector

Luxembourg  	People employed in the TAW sector (national data)	Proportion of the Luxembourgish workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	11 473 <i>Source: Ministry of Labour, 2022.</i>	National data	Eurostat	59
		1.53 (31 March 2023)	1.2 (2020) 2.6 (2021) ⁽⁵³⁾	

Two trade unions	There are two general trade unions that also cover TAW workers in Luxembourg, although concrete numbers are not available. Both unions conclude two multi-employer collective bargaining agreements with FES, which cover 100 % of TAW workers in Luxembourg. While OGB-L is a member of UNI Europa Agency Workers, LCGB is not affiliated to UNI Europa Agency Workers (but is affiliated to UNI Europa).								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Luxembourg Confederation of Independent Trade Unions (Services and Energy) (OGB-L)	No estimate possible	N.A.	N.A.	Increasing	All sectors except the private security sector	Yes (legal requirements)	Yes (MEB)	Yes – both UNI Europa and UNI Europa Agency Workers	Only OGB-L is affiliated to UNI Europa Agency Workers. All three of the largest TWAs have union organisations from OGB-L and LCGB
Luxembourg Confederation of Christian Trade Unions (Services) (LCGB Services)	No estimate possible	N.A.	N.A.	Increasing	All sectors except the private security sector	Yes (legal requirements)	Yes (MEB)	Yes – UNI Europa but not UNI Europa Agency Workers	Services and, hence, are represented in UNI Europa Agency Workers

⁽⁵³⁾ Break in time series.

Representativeness of the European social partner organisations: Temporary agency work sector

One employer organisation	There is only one employer organisation in the TAW sector in Luxembourg: FES. FES negotiates a multi-employer collective bargaining agreement with OGB-L and LCGB Services, which covers 100 % of TAW workers. FES is also a member of WEC-Europe.							
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
FEDIL Employment Services (FES)	32	75–80	Increased	All sectors except the private security sector	Yes (mutual recognition)	Yes (MEB)	Yes – WEC-Europe	FES is affiliated to WEC-Europe. All three of the largest TWAs are members of FES and, hence, are represented by WEC-Europe

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Randstad Interim	Multinational	1 480 (December 2022)	OGB-L, LCGB Services	FES	MEB	Yes
Second largest	Adecco Luxembourg	Multinational	1 120 (December 2022)	OGB-L, LCGB Services	FES	MEB	Yes
Third largest	Sofitex SARL Personnel Temporaire	National	1 060 (December 2022)	OGB-L, LCGB Services	FES	MEB	No

Representativeness of the European social partner organisations: Temporary agency work sector

Malta 	People employed in the TAW sector (national data)	Proportion of the Maltese workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	9 111 (2022) <i>Source: 2022 Annual Labour Force Survey.</i>	National data	Eurostat	No data
		3.2 (2022 Annual Labour Force Survey) (greatly underestimated, according to the social partners)	1.9 (2021) 3.4 (2022)	

Two trade unions	There are no specific sector-related trade unions for TAW workers in Malta. Two general trade unions cover some portion of TAW workers: the GWU and UHM. Both the GWU and UHM conclude single-employer, company-level collective agreements for TAW workers. Neither of the unions is affiliated to UNI Europa Agency Workers, but the GWU is affiliated to UNI Europa as a general trade union.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
General Workers Union (GWU)	6 000+ TAW members (estimate, largest)		N.A.	Increasing	Care worker services in private/public hospitals and private households, food and drink, manufacturing, security services, administrative/clerical services, cleaning services	Yes	Yes (company level only)	Yes – affiliated to a number of European organisations, including UNI Europa; however, not for TAW	The GWU and UHM are not affiliated to UNI Europa Agency Workers. This means that workers from the three largest TWAs in Malta are not represented at the EU level
UHM Voice of the Workers (UHM)	1 300+ (estimate, second largest)		N.A.	Increasing	Human health / hospitals (care workers), food and drink (cafeteria attendants), waste management, sea transport (mooring workers, seamen), security services, cleaning	Yes (but not specifically for TAW as a sector)	Yes (company level only)	No	

Representativeness of the European social partner organisations: Temporary agency work sector

					services, administrative/clerical services				
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Two employer organisations	There are no specific sector-related employer organisations for TAW workers in Malta. Two general employer organisations cover some portion of TWAs: MEA and the Malta SME Chamber. Neither of the employer organisations is affiliated to WEC-Europe.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Malta Chamber of SMEs (SME Chamber)	8	1 500–1 600 TAW workers (rough estimate)	Increased	Human health / hospitals, food and drink, courier services, fast-moving consumer goods, information technology professionals, administrative/clerical services, security services	Not applicable	No	No	Neither of the employer organisations is affiliated to WEC-Europe
Malta Employers Association (MEA)	20	10 000 TAW workers (rough estimate)	Stable	construction, human health / hospitals, commerce, food and drinks, road transport, courier services, public services, private services, manufacturing, administrative/clerical services	Not applicable	No	No	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	OZO Group	National	3 000+	GWU	Information not available	SEB	Information not available
Second largest	Healthmark	National	3 000+	GWU	Information not available	SEB	Information not available

Representativeness of the European social partner organisations: Temporary agency work sector

Third largest	G4S Malta	Multinational, subsidiary	1 500+	GWU	Information not available	SEB	Information not available
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Representativeness of the European social partner organisations: Temporary agency work sector

Netherlands  	People employed in the TAW sector (national data)	Proportion of the Dutch workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	915 000	National data	Eurostat	16 920
	<i>Source: ABU, 2022.</i>	10 (estimate)	5.5.3 (2021) 5.2 (2022)	

Three trade unions	There are three trade unions active in the TAW sector in the Netherlands: the FNV, the CNV and De Unie. All are involved in multi-employer collective bargaining with the two employer organisation: ABU and the NBBU. The FNV is the only trade union that is a member of UNI Europa Agency Workers. The CNV is another trade union with some members in the TAW sector. Based on expert estimations, CNV is the second largest union organising TAW workers and is also involved in collective bargaining (not confirmed/disclosed by CNV). De Unie, according to the expert's opinion, is also involved in collective bargaining for TAW workers; however, little to no information was available on its structure and/or functioning.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector- relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa
Federation of Dutch Trade Unions (FNV)	11 000	~ 1.20		Increasing	All (except live performanc e)	Yes (legally)	Yes	Yes – UNI Europa Agency Workers and ETUC	Only one trade union in the Netherlands, the FNV, is affiliated to UNI Europa for the TAW sector. The FNV also organises some workers in all three of the largest TWAs. Two other unions that are involved in multi- employer collective bargaining (including in the three largest companies), the CNV and De Unie, are not affiliated to UNI Europa Agency Workers
Christian National Trade Union Federation (CNV)	Not disclosed	N.A.	Not disclosed	Not disclosed	n.d.	Yes (mutual recognition)	Unknown (not disclosed) Expert assessment: yes (MEB)	Yes – UNI Europa, but not UNI Europa Agency Workers	
The Union (De Unie)	N.A.	N.A.	N.A.	N.A.	N.A.	Yes	N.A. Expert assessment: yes (MEB)	N.A.	

Representativeness of the European social partner organisations: Temporary agency work sector

Two employer organisations	There are two sectoral employer organisations in the TAW sector with workforces of member companies coming from all sectors of the economy. ABU is the largest and the most representative, in terms of its membership strength and its involvement in sectoral collective bargaining and social dialogue structures. All three of the largest TAW companies in the Netherlands are members of ABU. The NBBU is the second largest employer organisation in the sector; it is involved in sector- and company-level collective bargaining.							
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Algemene Bond Uitzendondernemingen (ABU)	522	60–65	Stable	All	Yes (legal and mutual recognition)	Yes (MEB)	Yes – WEC-Europe	The largest and most representative employer organisation, ABU, is involved in sectoral collective bargaining and is affiliated to WEC-Europe. All three of the largest TWAs are members of ABU. The NBBU, although involved in collective bargaining at both levels, is not affiliated to any European organisation
Nederlandse Bond van Bemiddelings- en Uitzendondernemingen (NBBU)	1 283	About 26	Increased	All	Yes (mutual recognition)	Yes (MEB and SEB)	No	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Randstad Group NL	Multinational, parent	68 000	FNV, CNV, De Unie, LBV	ABU	MEB	Yes
Second largest	HeadFirst Group	National	25 000	FNV, CNV, De Unie, LBV	ABU	MEB	No
Third largest	RGF Staffing NL	Multinational, parent	15 000	FNV, CNV, De Unie, LBV	ABU	MEB	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Poland	People employed in the TAW sector (national data)	Proportion of the Polish workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	700 138 (2022) (number of workers)	National data	Eurostat	3 611 (2022)
	1 195 259 (2022) (number of contracts)	0.4	0.5 (2020)	
	<i>Source:</i> Ministry of Family, Labour and Social Policy, 2022.		0.5 (2021) 0.4 (2022)	

One trade union	In general, representation of TAW workers in Poland is very fragmented. However, some TAW workers are represented by the trade union Solidarność. According to the expert's opinion, two other trade unions also represent some TAW workers: the OPZZ Labour Confederation and the Trade Unions Forum (Forum Związków Zawodowych (FZZ)); however, additional information/data are not available.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Solidarity (Solidarność)	There is minimal information on TAW workers' participation in the trade unions. TAW workers are part of the structures within larger, representative trade unions. In addition, they are part of sectoral, company-level structures that are operating within the abovementioned large and cross-sectoral trade unions					N.A.	No information	Yes – UNI Europa Agency Workers (not confirmed)	Solidarność is a member of UNI Europa Agency Workers
OPZZ Labour Confederation ^(a)						N.A.	No information	No information	
Trade Unions Forum (Forum Związków Zawodowych (FZZ)) ^(a)						N.A.	No information	No information	

^(a) Due to a lack of data, OPZZ and FZZ are not included in the study.

Representativeness of the European social partner organisations: Temporary agency work sector

Two employer organisations	There are two employer organisations in the TAW sector in Poland. Only one is affiliated to WEC-Europe. According to estimations, the largest organisation is PFHR, followed by the second largest, OKAP. According to the expert, there is another employer organisation with some members in the sector in Poland: SAZ. However, no information/data are available on its structures.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Ogólnopolski Konwent Agencji Pracy (OKAP)	Around 50	N.A. (Difficult to estimate)	Decreasing	Road transport, courier services, manufacturing	Yes (via membership of an umbrella employer organisation, Employers of Poland)	No / no data	No	Only one employer organisation from Poland – PFHR – is affiliated to WEC-Europe. Randstad, ManpowerGroup and the Adecco Group are WEC-Europe corporate members
Polskie Forum HR (PFHR)	Around 30 (not all members are TWAs)	A third of all TAW workers (estimate)	Increased	Metal, food and drink, manufacturing (automotive)	Yes (via membership of Confederation Lewiatan)	No data	Yes – WEC-Europe	
Association of the Employment Agencies (SAZ) ^(a)	Approximately	Not known	Not known		No	No data	No information / no	

^(a) Due to a lack of data, SAZ is not included in the study.

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Randstad	Multinational	Tens of thousands (estimation)	Not known	PFHR	Not known	Yes
Second largest	Manpower Group	Multinational	Tens of thousands (estimation)	Not known	PFHR	Not known	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Third largest	Adecco Group	Multinational	Tens of thousands (estimation)	Not known	PFHR	Not known	Yes
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Representativeness of the European social partner organisations: Temporary agency work sector

Portugal 	People employed in the TAW sector (national data)	Proportion of the Portuguese workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	300 000 (2019, estimate)	National data	Eurostat	380
	Source: Public employment service (IEFP), 2019.	5.9 (expert calculation)	1.7 (2021) 1.4 (2022)	

Three trade unions	Three sectoral trade unions in Portugal represent some TAW workers: Sinttav, Sindetelco and Siteze. There are no specific sector-related social dialogue bodies in Portugal. In 1989, several trade unions united under Fetese (at that time dominated by the union Siteze) signed a multi-employer, open-ended collective agreement for TAW workers, which still covers a significant number of TAW workers today. Siteze was the leading force of Fetese when the collective agreement for TAW workers was signed, but has since chosen to separate from the federation, which lost its significance in the TAW sector and is not included in the study. Two of the three representative trade unions – Sindetelco and Sinttav – are members of UNI Europa Agency Workers.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
National Trade Union of Telecommunications and Audiovisual Workers (Sinttav)	Approximately 2 634	~ 0.88	N.A.	Increasing	Public services, private services, audiovisual, live performance, telecommunications, multimedia, communication, information, arts, culture, technology and services sectors	Yes (mutual recognition)	No	Yes – UNI Europa Agency Workers	All three trade unions – Sindetelco, Sinttav and Siteze – are affiliated to UNI Europa Agency Workers
Democratic Union of Postal, Telecommunications,	Approximately 800	~ 0.27	N.A.	Increasing	Courier services, private services, audiovisual, telecommunications,	Yes (mutual recognition)	No	Yes – UNI Europa Agency Workers	

Representativeness of the European social partner organisations: Temporary agency work sector

Media and Services Workers (Sindetelco)					call centres, logistics and private security sectors				
Trade Union of Service Sector Workers (Sitiese)	< 100 (of approximately 2 000–3 000 members)	~ 0.03	~ 2.33 to 5	N.A.	n.d.	Yes (mutual recognition)	Yes	Yes – UNI Europa Agency Workers	

One employer organisation	There is only one employer organisation in Portugal: Apespe RH. It has with approximately 40 affiliated TAW agencies. Apespe RH signed an open-ended, multi-employer collective agreement with Fetese in 1989.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Associação Portuguesa das Empresas do Setor Privado de Emprego e de Recursos Humanos (rebranded as Apespe RH in 2023)	40	30 088 (estimation based on workers covered by the MEB that Apespe RH's predecessor, APETT, concluded in 1989)	Increased	Construction, metal, commerce, agriculture, food and drink, road transport, courier services, private services, manufacturing, contact centres, ports, hotels, restaurants and catering, information technology	Yes (mutual recognition)	Yes	Yes – WEC-Europe	The only employer organisation for TAW – Apespe RH – is affiliated to WEC-Europe. All three of the largest TWAs in Portugal are affiliated to Apespe RH

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Multipessoal	National	4 878	Sinttav	Apespe RH	MEB	No – membership indirectly through Apespe RH

Representativeness of the European social partner organisations: Temporary agency work sector

Second largest	Multitempo	Multinational (Job&Talent)	4 044	Sinttav	Apespe RH	MEB	No – membership indirectly through Apespe RH
Third largest	Triangulu	National	3 000	No information obtained	Apespe RH	MEB	No – membership indirectly through Apespe RH

Representativeness of the European social partner organisations: Temporary agency work sector

Romania 	People employed in the TAW sector (national data)	Proportion of the Romanian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	39 307 (2021)	National data	Eurostat	787 (2021)
	43 569 employees (44 985 with labour contracts) (2022) <i>Source: National Trade Register Office.</i>	Approximately 0.58 (2022)	0.2 (2021) 0.3 (2022)	

No trade unions	There is no trade union organising TAW workers in Romania, but TAW workers can join any existing trade union. Nevertheless, according to Romanian law, in the absence of a representative trade union, workers in companies with more than 21 employees are represented in the bargaining process by the employee representative, who must receive at least 50 % of the employees' votes. Data for 2022 show that most TAW workers (1 669 employees) were covered by a collective bargaining agreement at the company level.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
—	—	—	—	—	—	—	—	—	TAW workers from Romania are not represented at the EU level

One employer organisation	There is only one business association in the TAW sector in Romania: the AFSRU. It is affiliated to WEC-Europe. The AFSRU is not involved in collective bargaining (as it is a business association) and does not participate in social dialogue bodies in Romania.								
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	
Asociația Furnizorilor de Servicii de Resurse Umane (AFSRU) (business association)	14	40	Decreasing	All sectors except human health / hospitals and education	No (business association)	No	Yes – WEC-Europe	The only business association is affiliated to WEC-Europe. The Adecco Group is a WEC-Europe corporate member	

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
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Representativeness of the European social partner organisations: Temporary agency work sector

Largest	Lugera & Makler Romania	Multinational, subsidiary	4 217 (data from 2021)	No information available	AFSRU	No information available, but the law requires any company with more than 21 employees to have collective bargaining	No
Second largest	Prohuman APT	Multinational, subsidiary	3 330 (data from 2021)	No information available	AFSRU	No information available, but the law requires any company with more than 21 employees to have collective bargaining	No
Third largest	Adecco Resurse Umane	Multinational, subsidiary	3 079 (data from 2021)	No information available	AFSRU	No information available, but the law requires any company with more than 21 employees to have collective bargaining	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Slovakia 	People employed in the TAW sector (national data)	Proportion of the Slovak workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	46 563 (2021)	National data	Eurostat	333
	Source: Statistical Office of Slovak Republic.	1.8	4.4 (2021) 5.1 (2022)	

One trade union	There are no sector-specific trade unions for TAW workers in Slovakia. The only trade union that represents some TAW workers is OZ KOVO; however, it is not considered representative for the sector, and is also not involved in any bipartite or tripartite social dialogue related to the TAW activities. TAW workers in Slovakia are primarily production workers, manual operators in the engineering and automotive industries, whose assignment is always for a fixed-term period. There are no separate collective agreements for TAW workers, but provisions from existing collective agreements apply to both regular employees and TAW workers.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Trade Union Federation KOVO (OZ KOVO)	N.A. (negligible number)	N.A.	N.A.	Stable	Construction, metal, manufacturing	No	No (but collective bargaining in sectors of main activity)	Yes – IndustriAll Europe, but not for TAW workers	OZ KOVO is not affiliated to UNI Europa Agency Workers. However, as a metalworkers' trade union, it is affiliated to IndustriAll Europe

One employer organisation	There is only one employer organisation in the TAW sector in Slovakia. APAS is considered representative based on legal requirements and mutual recognition. Although it is not involved in bipartite or tripartite social dialogue related to TAW activities or collective bargaining, APAS participates in the tripartite meetings of the Economic and Social Council. The largest TWA in Slovakia – Index Nosluš, with more than 2 000 TAW workers – is a member of APAS.								
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe	

Representativeness of the European social partner organisations: Temporary agency work sector

Asociácia personálnych agentúr Slovenska (APAS)	9direct members plus 400 indirect members	50	Decreased	All sectors	Yes (legal requirements and mutual recognition)	No	No (previous WEC-Europe membership suspended)	The only representative employer organisation – APAS (of which the largest TWA, Index Nosluš, is a member) – is not affiliated to WEC-Europe
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Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Index Nosluš	National	2 077 (as of 31 January 2023)	N/A	APAS, Asociácia zamestnávateľských zväzov a zdrúžení (AZZZ)	N/A	No
Second largest	Adecco Slovakia	International, subsidiary	1 100	N/A	N/A	N/A	No
Third largest	Transfer International Staff	International, subsidiary	936 (as of 28 February 2023)	N/A	N/A	N/A	No

Representativeness of the European social partner organisations: Temporary agency work sector

Slovenia 	People employed in the TAW sector (national data)	Proportion of the Slovenian workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	18 239 (2020)	National data	Eurostat	140
	Source: Ministry of Labour, Family, Social Affairs and Equal Opportunities.	3.5 (2020)	3.5 (2020) 4.8 (2021) 5.9 (2022)	

One trade union	There is only one trade union that specifically targets and organises TAW workers and other workers with non-standard contracts in Slovenia: the SSS. It covers all workers from sectors not covered by the 22 sectoral trade unions in the ZSSS. It unites, for example, smaller profession-related TUs, enterprise TUs, groups of workers, Pro Plus (union for journalists), the Personal Assistance Trade Union, ISS Cleaning Service and Aerodrom Ljubljana (airport). Its TAW members are individuals who often want to remain anonymous and keep their membership hidden from their employer. Most of the TAW members are from the municipal services sector.								
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector- relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Free Trade Union of Slovenia (SSS)	< 150	< 0.82	< 10 (of 1 500 members)	Decreasing	N.A.	No (but it is affiliated to umbrella organisation ZSSS, which is recognised as representative)	No	No – only via the umbrella organisation ZSSS in ETUC	The SSS is not affiliated to UNI Europa Agency Workers

One employer organisation	The only organisation that represents TWAs in Slovenia is ZAZ. ZAZ is not involved in any bipartite or tripartite social dialogue related to the TAW sector or in collective bargaining. The organisation has no European affiliation.								
	Member companies	Workforce of member companies (%)	Trend	Sector-relatedness		Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe

Representativeness of the European social partner organisations: Temporary agency work sector

Združenje agencij za zaposlovanje (ZAZ)	10	70	Stable	Construction, metal, commerce, agriculture, food and drink, road transport, public services, manufacturing, audiovisual, mining, transport and warehousing, finance and insurance, professional, scientific and technical activities, other business activities	No	No	No	ZAZ is not a member of WEC-Europe
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Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Kariera	National	2 300	n.a.	ZAZ	No collective bargaining	No
Second largest	Adecco H.R.	Multinational, subsidiary	1 500	n.a.	ZAZ	No collective bargaining	No
Third largest	Trenkwalder	Multinational, subsidiary	873	n.a.	ZAZ	No collective bargaining	No

Representativeness of the European social partner organisations: Temporary agency work sector

Spain 	People employed in the TAW sector (national data)	Proportion of the Spanish workforce employed in the TAW sector (%)		Number of companies in the TAW sector
	807 704 TAW workers	National data	Eurostat	
	219 850 directly employed TAW workers	4.8 (2022)	4.1 (2021)	
	8 963 internal staff <i>Source: 2022 TWA statistics.</i>		3.9 (2022)	

Three trade unions		There are three trade unions organising TAW workers in Spain: the largest is Unión y Empleo, the second largest is CCOO – Servicios and the third largest is FESMC-UGT. In 2012, CCOO – Servicios split, and a new organisation was created: Unión y Empleo. It is estimated that this new union covers the largest number of TAW workers in Spain. However, the union refused to participate in this study and, therefore, the data are not available. TAW workers are covered by the same collective agreement that applies to the hiring company; internal staff of TWAs are covered by specific collective agreements. CCOO – Servicios and FESMC-UGT signed a national sectoral collective agreement for TWA (2018–2020) with Asempleo, which covered 100 % of dependent TAW workers. The agreement expired in 2020. Ongoing negotiations for its renewal include the new union organisation (Unión y empleo), which holds the majority of union representativeness at the bargaining table.							
	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Unión y Empleo	N.A. (Most representative union in the sector)	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	No (not confirmed / N.A.)	CCOO – Servicios and FESMC-UGT are affiliated to UNI Europa Agency Workers. The most important union in the sector – Unión y Empleo – which is the most representative at the national level (seven seats at the
Services Federation – Workers’	850 (mostly internal staff); does not distinguish between internal staff and TAW workers	N.A.	N.A.	Decreasing, with partial recovery after the 2012 split		Yes	Yes	Yes – UNI Europa Agency Workers	

Representativeness of the European social partner organisations: Temporary agency work sector

Commissions (CCOO – Servicios)				within the organisation					bargaining table of the national sectoral collective agreement versus the six for FESMC-UGT and CCOO – Servicios combined), is not affiliated to UNI Europa Agency Workers
Mobility, Consumption and Services Federation of the General Union of Workers (FESMC-UGT)	Overall number not available 443 (mostly internal staff, 2023); does not distinguish between internal staff and TAW workers	N.A.	N.A.	Increasing – almost doubled over the last three years (221 members in 2020)	All	Yes	Yes	Yes – UNI Europa Agency Workers	

One employer organisation	There is only one employer organisation in the TAW sector in Spain: Asempleo. All three of the largest companies belong to Asempleo, which concludes both multi-employer and single-employer collective bargaining agreements. Asempleo signed a national sectoral collective agreement for TWA (2018–2020) with CCOO – Servicios and FESMC-UGT.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Asociación de Agencias de Empleo y Empresas de Trabajo Temporal (Asempleo)	85	N.A.	Increased	construction, metal sector, commerce, agriculture, food and drinks, road transport, private services, manufacturing, audiovisuals, live performances and art	Yes	Yes – as of October 2023, one national collective agreement has been signed for 2018–2020; six company collective agreements have been signed	Yes – WEC-Europe	Asempleo is affiliated to WEC-Europe and organises more than a third of all companies in the TAW sector in Spain. All three of the largest TWAs are members of Asempleo and, hence, represented in WEC-Europe. The Adecco, Randstad and Manpower are WEC-Europe corporate members

Representativeness of the European social partner organisations: Temporary agency work sector

				creation, other				
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Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Randstad	Multinational	19 223	Unión y Empleo, CCOO and UGT	Aempleo	Both SEB and MEB	Yes
Second largest	Adecco	Multinational	23 490	Unión y Empleo	Aempleo	Both SEB and MEB	Yes
Third largest	Manpower	Multinational	15 250	N.A.	Aempleo	MEB	Yes

Representativeness of the European social partner organisations: Temporary agency work sector

Sweden 	People employed in the TAW sector (national data)	Proportion of the Swedish workforce employed in the TAW sector (%)		Number of companies in the TAW sector (national data)
	85 250 (2021) <i>Source: Statistics Sweden.</i>	National data	Eurostat	4 964
		2.9 (2021)	2.8 (2021) 2.8 (2022)	

Eight trade unions Six are the main signatory unions at various levels (signing five collective agreements) Two unions are members of the umbrella organisation that concludes collective agreement (members of UNI Europa Agency Workers)	This study identified eight social partners in the TAW sector in Sweden. Six of these trade unions sign five collective agreements related to TAW; the other two unions are listed separately, as they are members of the European-level social partner organisation: UNI Europa Agency Workers. The largest union for TAW workers, Unionen, organises workers in TWAs. The second largest union – AHT – organises mainly students. AHT is composed of 13 academic profession trade unions. Its member union with the biggest share of TAW workers is Sveriges Ingenjörer, which is listed separately in this study. Of the five collective agreements, two are signed by three trade unions: the one for blue-collar TAW workers (covering 60 000 workers) is signed by LO and the employer organisation KF; the other is for white-collar workers and is signed by AHT, Unionen and KF. The two agreements are estimated to cover 80–90 % of TAW workers. LO does not have individual TAW workers as members of the union; however, one of its member unions is SEKO, which is affiliated to UNI Europa Agency Workers. Other key unions are VF and the Swedish Teachers' Union. None of the unions are involved in any sectoral social dialogue structures (because these structures do not exist). The five CLAs signed in the sector are: • blue-collar CLA – the umbrella confederation LO, which consists of 14 trade unions, among them SEKO (listed separately as a member of UNI Europa Agency Workers); • TAW CLA for doctors – Sveriges Läkarförbund; • TAW CLA for nurses – Vårdförbundet; • TAW CLA for teachers – Sveriges Lärare; • white-collar CLA – Unionen and AHT, which consists of 13 academic profession trade unions (among them Sveriges Ingenjörer, listed separately as an member of UNI Europa Agency Workers, although this was not confirmed by Sveriges Ingenjörer).
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Representativeness of the European social partner organisations: Temporary agency work sector

	Members	Proportion of workforce (%)	Proportion of trade union members (%)	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa Agency Workers
Unionen	9 581	~ 13.35		Stable	All sectors	Yes	Yes (multi-sector/cross-sector bargaining)	Yes – UNI Europa Agency Workers (plus UNI Europa for non-TAW members)	
Swedish Trade Union Confederation (LO)	Estimated 67 000 members of unions affiliated to LO (95 500 workers covered by the collective bargaining agreement for TAW workers)	Estimated 78.59	N.A.	Decreasing	Construction, metal, human health / hospitals, commerce, agriculture, food and drink, road transport, courier services, public services, private services, manufacturing, live performance (blue-collar workers)	Yes	Yes (multi-sector/cross-sector bargaining)	No (not for TAW members)	
Swedish Union for Service and Communications Employees (SEKO)	N.A. (member of LO)	N.A.	N.A.	No data	Road transport, courier services, public services, private services	Yes	No (only through LO)	Yes – UNI Europa Agency Workers (plus UNI Europa	

Representativeness of the European social partner organisations: Temporary agency work sector

								for non-TAW members)	
Professional Associations in Trade and Services (AHT)	4 500 (members of 13 unions that are part of AHT; mainly student members)	~ 6.27	N.A.	Stable	All	Yes	Yes (multi-sector/cross-sector bargaining – white-collar workers only)	No	
Sveriges Ingenjörer (SI)	1 500 (member of AHT)	~ 1.75	N.A.	Stable	All sectors (white-collar work only)	Yes	Yes	Yes – UNI Europa Agency Workers ⁽⁵⁴⁾	
Swedish Association of Health Professionals (VF)	1 000	~ 1.17	N.A.	Increasing	Human health / hospitals	Yes	No (only for healthcare workers)	Yes – EPSU, EMA, EPBS, European Federation of Radiographer Societies, European Federation of Nurses Associations, European Health Management Association	
Swedish Teachers' Union	Estimated 30	~ 0.04	N.A.	Stable	Education	Yes	No (only in education)	Yes – the European	

⁽⁵⁴⁾ Not confirmed by the national-level trade union.

Representativeness of the European social partner organisations: Temporary agency work sector

								Trade Union Committee for Education	
Sveriges Läkarförbund	N.A.		N.A.	N.A.	Human health/hospitals	Yes	No (only for doctors)	SACO	Two unions are affiliated to UNI Europa Agency Workers: Unionen and SEKO. Of the two, only Unionen is directly involved in collective bargaining for the sector. SEKO is not directly involved in collective bargaining. The umbrella confederation LO, to which SEKO is affiliated, signs collective agreements, but is not a member of UNI Europa Agency Workers. The two unions that cover most of the workers in the TAW sector – AHT and LO – are not members of UNI Europa Agency Workers. In addition, most blue-collar workers are not covered by UNI Europa Agency Workers, since they are organised in their sectoral trade unions, which are not always members of UNI Europa Agency Workers

Representativeness of the European social partner organisations: Temporary agency work sector

One employer organisation	There is only one employer organisation in the TAW sector in Sweden. KF is considered representative, in terms of its membership strength and its involvement in sectoral collective bargaining with trade unions Unionen and AHT. It is not involved in any other social dialogue structures. All three of the largest TWAs in Sweden are members of KF; all of them also conclude MEB agreements for TAW workers.							
	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of WEC-Europe
Kompetensföretagen (KF)	921	70 000 (70 %)	Increased	All sectors	Yes	Yes (multi-sector/cross-sector bargaining)	Yes – WEC-Europe	The only representative employer organisation, involved in sectoral collective bargaining, is affiliated to WEC-Europe. Two of the largest multinational TWAs in Sweden – Manpower and Randstad, united under the umbrella organisation KF – are also direct members of WEC-Europe

Largest TWAs in NACE 78.2	Name	National or multinational company	Number of TAW employees	Trade union(s) organising the TAW employees in this TWA	Employer organisation(s) to which this TWA employer is affiliated	Collective bargaining agreement applicable	Is this company directly affiliated to the WEC?
Largest	Manpower	Multinational	5 020 (2021)	Unionen, Ledarna, member unions of AHT, LO	KF	MEB	Yes
Second largest	Randstad	Multinational	4 915 (2019)	Unionen, Ledarna, member unions of AHT, LO	KF	MEB	Yes
Third largest	Lernia Bemanning	National	4 228 (2021)	Unionen, Ledarna, member unions of AHT, LO	KF	MEB	No

Annex 3. National correspondents who have contributed to this study

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Representativeness of the European social partner organisations: Temporary agency work sector

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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 temporary agency work (TAW). Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements.

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identifies UNI Europa Agency Workers (representing employees) and the World Employment Confederation – Europe (representing employers) as the most representative European-level social partner organisations in the TAW sector.

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

