

**Promoting dialogue and fostering cooperation between employers and
employee organisations; building social partnerships in the ICT sector
(VS/2012/438)**

**MAPPING OF RELEVANT EMPLOYERS' AND WORKERS' ASSOCIATIONS IN EUROPE
OPERATING IN THE ICT SECTOR**



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Introduction

ICT is fully acknowledged as a key enabler for economic recovery. It has been continuously growing for years in spite of crisis. It has great impacts on the economy, the labour market, the society and the culture as well. European Union totally recognizes the need for policies to the ICT sector as a whole, able to address the main challenges this sector has to face in order to exploit all potential benefits. In the other sectors, social partners at national and European level created common tables around which they sit and discuss with the aim of achieving agreements on pressing issues such as employment, working conditions and industrial relations. In the case of ICT, there is no a specific European Social Dialogue Committee, apart from the one dedicated to the Telecom sector which, anyway, only partially addresses the concerns of the Information and Communication Technology industry. Neither is there an official representative study which may provide an overall but precise screenshot of the ICT sector across Europe and suggest who might take part in a potential future Social Dialogue platform.

This study moves steps from this point and aims at collecting information able to answer some overall questions: how is the sectorial context across Europe like? What kind of associations are there in each country, representing the main ICT stakeholder such as employers and workers? What about the existing social dialogue at national level across Europe?

Objectives of the study

The study wants to be a mapping exercise to detect the relevant employers' and workers' associations in the ICT at local, national and Europe level. The aim is to identify potential partners for a future social dialogue, that's, those associations which might be interested in participating in a future platform focused on the ICT sector.

Basically founded on a web-desk analysis, the study aims to provide an overview on what employers' and workers' associations are mainly visible in each country which operate in some extent in the ICT sector and may have somehow an influence in a sectoral social dialogue. The study also try to detect what kind of social dialogue already exist at national level, through all the information accessible on the net and a few further checks by direct contact.

Methodology

The study has firstly defined the research field regarding to the ICT sector. In fact, the more you come across with this term, the more you realize that there are many similar but not equal interpretations, sometimes being referred to mainly software production, maintenance and hardware, some other times also including mobile services and so on. Moreover, in the last years the evolution of the sector has seen an increasing convergence of Information technology and the Communication services related to the mobile and fixed infrastructures, with the development of new components generated by such a merge. In this way, the study has considered the ICT sector as the Global Digital Market including devices, systems and infrastructures as well as software and solutions such as Internet of Things and web platforms, furthermore services related to both software and fixed / mobile nets and finally digital content.¹

¹ Assinform, NetConsulting, *Report 2012 on Informatics, Telecommunication and Digital content.*

In order to detect as many potential associations as possible and to verify their relevance at best, the study used a double approach:

- **Country by country research:** the desk analysis wants to pinpoint the main organisations through a research on the web by key words (*bottom-up*)
- **Fast track research:** starting from a list of renowned European umbrella organisations, the research analyses their membership to identify potential national associations and other similar ICT stakeholder's bodies interesting for the mapping purpose (*top-down approach*)

The top down approach was carried out through the screening of a few umbrella organisations at both European and national level such as trade union confederations, ICT clusters, regional networks.

Regarding to the side of **employers**, the following bodies were considered:

- **BUSINESSEUROPE**
- **CEA – PME**, Confederation Europeenne des Associations de Petites et Moyennes Entreprises
- **CEEEOA** , Central and Eastern European Outsourcing Association
- **CEPIS**, Council of European Professional Informatics Societies
- **DIGITALEUROPE**
- **ICT CLUSTER Bulgaria**
- **IT STAR**, Regional ICT Association in Central, Eastern & Southern Europe
- **PIN-SME**, Pan European ICT & eBusiness Network for SMEs
- **UEAPME**, European Association of Craft, Small and Medium-sized Enterprises

Regarding to the side of **workers**, the affiliations of the following bodies were analysed:

- **BASTUN** Baltic Sea trade Union Network
- **CESI** European Confederation of Independent Trade Unions
- **ETUC** European Trade Union Confederation
- **IMF** International Metalworker Federation
- **IndustriALL Europe**
- **ITUC** International Trade Union Confederation
- **UNI Europe ICTS**

Moreover, further web resources were used such as online observatory tools and database:

- **Worker-participation.eu:** an online service by ETUI European Trade Union Institute
- **eironline:** the European industrial relations observatory on-line, a monitoring instrument which belongs to the Eurofound's Network of European Observator (NEO)
- **Global Unions Database:** an online project by New Unionism Network, reporting data based on self-census and official national reports.

Regarding to the extension of the research, the study focused on all the 28 European member states. Some more countries were included as representative of European geographical areas of economic and politic interest, as shown in the picture.

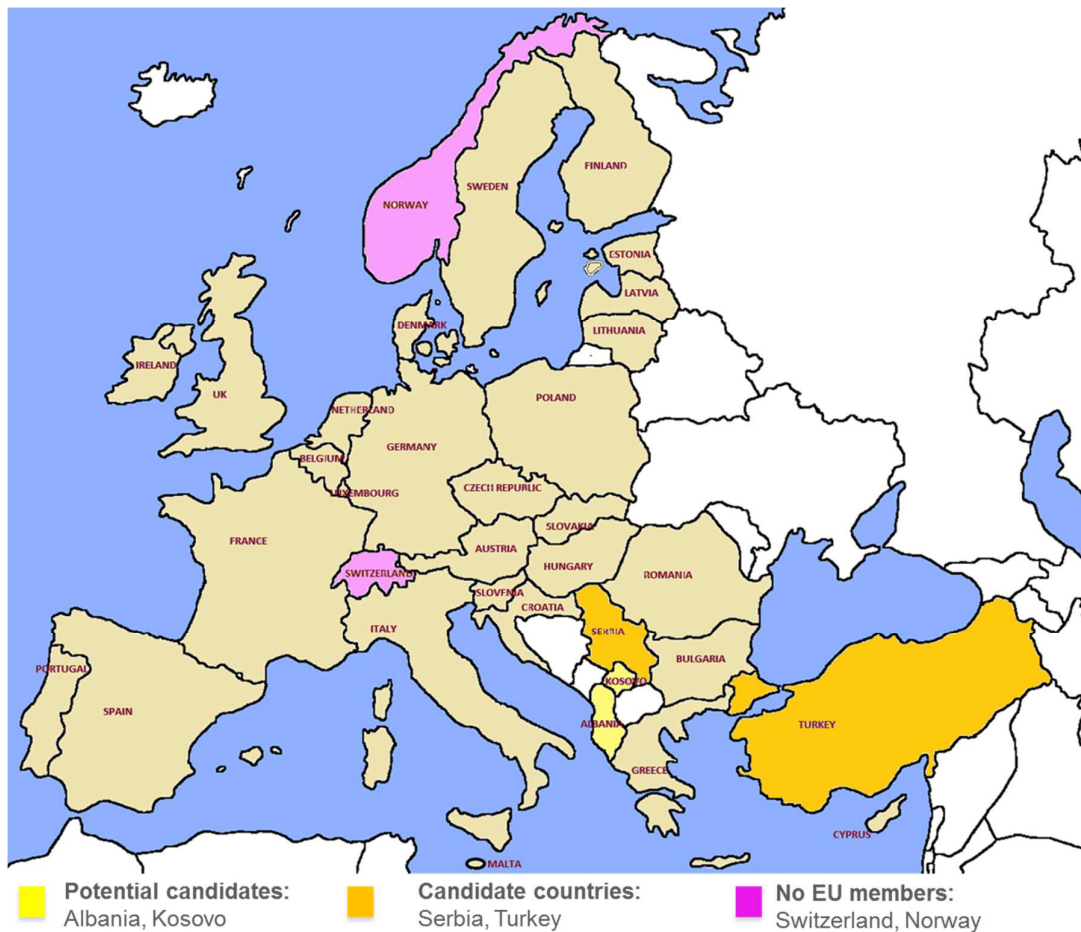


Fig. 1 – Countries included in the study

The mapping study records a set of information for each association detected:

- **Typology:** *Workers/Employers/Other* organization
- **Scope:** it mainly operates at either national (*N*) or local (*L*) level.
- **Size:** the dimension in terms of affiliated members; moreover, when possible, of percentage of relevant market or national turnover.
- **Focus:** the economic sector represented; that's, *ICT*, if it completely operates in ICT sector; *ICT+*, if the organization represents different sectors among which there is also ICT with an explicitly named and dedicated structure; *General*, if it operates in other sectors which, yet, likely embed ICT such as Consumer Electronics, Energy, Health, Print & Publishing, Bank-Finance and so on.
- **In short:** a brief description of the organisation

Concerning the typology *Other*, it has been introduced as the mapping study has come across a few more organisations which can't be actually considered either workers' or employers' associations. They represent mostly a mix of different actors such as business companies, research bodies, universities and other kind of organisations, which often work jointly with the governmental institutions and support actions with the aim of influencing positively the ICT business and the digital society development at national level. Otherwise, they are professional associations, that's, they gather ICT practitioners and professionals which actively operate to improve the sector, in terms of filling the skill gaps, often providing specific ICT patents and licenses such as ECDL, training and dialogue with the institutions as well.

In order to go deeper on details, the mapping includes some more features according with the type of organization analysed.

Regarding to the **workers' organisations**, the study tried to better identify the economic context of action within the field *Focus*. Therefore each record was associated to one or more of the following options according with the self-description on the web:

- **ICT**: completely dedicated to one or more subsector of ICT as defined in the research and with the exclusion of TLC.
- **PT&TLC**: specifically devoted to the TLC sector such as organisations linked to Post & Telecommunications.
- **Audio-visual and Media graphics**
- **Print, Publishing Advertising**
- **Electrics and Electronics**
- **Technology-based industry**: i.e. Research Labs; Technology Innovation Centres; Energy; Healths.
- **Services**: for example related to Finance, Bank, Insurance; Tourism; Business; Culture.

Regarding to the **employers' associations**, the study tried to better identify the aims and purposes pursued by the organization. Therefore each record was associated to one or more of the following options:

- **National Business development**
- **Internationalisation**
- **ICT and Digital Culture promotion**
- **Legal Information Service**
- **Dialogue with Institutions, Governemnt and policy makers**
- **Collective agreement**

General remarks and overall figures

The study reports a quite long list of organisations which match the features researched. Notwithstanding, it is important to note that it doesn't claim to be an exhaustive report and it is expected more associations to exist country by country. The aim of the present study has been to detect as many organisations and official data as a desk analysis mainly based on a web research allows to find. In this way, it doesn't pretend to be the representative study of the sector. Instead, it wants to map a few relevant organisations potentially receptive to and representative for a future Social Dialogue in ICT as well as it already exists in other important economic sectors.

In the analytical cards country by country, a brief national overview has been included. The purpose is to provide a general frame of the national economy, the ICT sector, the industry relations and the state of the sectorial collective agreement when found.

The overall figures show that the study detected 238 associations. Most of them are national workers' and employers' organisations; a few more mixed and professional associations are included as of particular interest in the ICT developing context.

	Workers'	Employers'	Others		TOTAL
			Professionals	Mixed	
National	118	92	3	10	223
International	3	11		1	15
TOTAL	121	103	3	11	238

Fig. 2 – Number of organisations by scope and typology.

The split data according with each country are shown in the following table.

Countries	Workers'	Employers'	Other	
			Professionals	mixed
<i>Albania**</i>	1	1		
Austria	2	5		1
Belgium	7	2		
Bulgaria	3	5		2
Croatia	2	1		1
Cyprus	1	2	1	
Czech Republic	2	3		
Denmark	6	3		
Estonia	1	1		
Finland	8	2		
France	9	4		
Germany	2	5		
Greece	2	2		
Hungary	1	2		
Ireland	5	3		
Italy	9	7		1
<i>Kosovo**</i>	1	1		
Latvia	1	1		2
Lithuania	2	1		1
Luxembourg	3	3		1
Malta	2	2		
Netherland	5	2		
<i>Norway</i>	5	2		
Poland	2	2	1	
Portugal	7	4		
Romania	3	4		
<i>Serbia *</i>	1	3		
Slovakia	1	1	1	1
Slovenia	1	2		
Spain	5	4		
Sweden	7	2		
<i>Switzerland</i>	3	5		
<i>Turkey*</i>	2	2		
United Kingdom	6	3		
Total by typology	118	92	3	10
Total	223			

* EU Candidate countries

** EU Potential candidates

Fig. 3 – Number of organisations by country and typology.

On the whole, the study pinpointed 31 workers' organisations completely devoted to ICT sector, 40 with at least a dedicated section and 47 operating in sector potentially related to ICT.

	Workers'	ICT	ICT+	General
<i>Albania**</i>	1		1	
<i>Austria</i>	2	1		1
<i>Belgium</i>	7	1	3	3
<i>Bulgaria</i>	3	1	2	
<i>Croatia</i>	2	1		1
<i>Cyprus</i>	1	1		
<i>Czech Republic</i>	2		1	1
<i>Denmark</i>	6	1	3	2
<i>Estonia</i>	1		1	
<i>Finland</i>	8	1	3	4
<i>France</i>	9	1	4	4
<i>Germany</i>	2		2	
<i>Greece</i>	2	1		1
<i>Hungary</i>	1	1		
<i>Ireland</i>	5	1	2	2
<i>Italy</i>	9	3	3	3
<i>Kosovo**</i>	1			1
<i>Latvia</i>	1	1		
<i>Lithuania</i>	2	1		1
<i>Luxembourg</i>	3	1		2
<i>Malta</i>	2			2
<i>Netherland</i>	5		3	2
<i>Norway</i>	5		2	3
<i>Poland</i>	2	1		1
<i>Portugal</i>	7	3	1	3
<i>Romania</i>	3	3		
<i>Serbia *</i>	1		1	
<i>Slovakia</i>	1	1		
<i>Slovenia</i>	1	1		
<i>Spain</i>	5	1	3	1
<i>Sweden</i>	7		1	6
<i>Switzerland</i>	3		2	1
<i>Turkey*</i>	2	2		
<i>United Kingdom</i>	6	2	2	2
Total	118	31	40	47

Fig. 4 – Distribution of the workers' organisations by country and by focus.

On the employers' side, about 78% of associations are either completely or partially related to ICT. The remaining represent member companies belonging to sectors which are expected to be strictly linked to ICT.

	Employers'	ICT	ICT+	General
<i>Albania**</i>	1	1		
Austria	5	3	1	1
Belgium	2		1	1
Bulgaria	5	3	1	1
Croatia	1		1	
Cyprus	2	1	1	
Czech Republic	3	1	1	1
Denmark	3	3		
Estonia	1	1		
Finland	2		1	1
France	4	3	1	
Germany	5	4		1
Greece	2	2		
Hungary	2	1		1
Ireland	3	2		1
Italy	7	3	3	1
<i>Kosovo**</i>	1	1		
Latvia	1	1		
Lithuania	1			1
Luxembourg	3	3		
Malta	2	1		1
Netherland	2	1	1	
<i>Norway</i>	2	2		
Poland	2	2		
Portugal	4	1	1	2
Romania	4	2	1	1
<i>Serbia *</i>	3	1	1	1
Slovakia	1	1		
Slovenia	2	1		1
Spain	4		2	2
Sweden	2	1		1
<i>Switzerland</i>	5	5		
<i>Turkey*</i>	2	2		
United Kingdom	3	1	1	1
Total	92	54	18	20

Fig. 5 – Distribution of the employers' organisations by country and by focus.

Analytical results of the mapping

EU member states

Austria

Austrian economy is predominantly characterized by small and medium-sized enterprises (SMEs) and rarely by large multinationals headquartered in the country. It is a highly industrialised country, with an important and still growing service sector, such as tourism and the public service². ICT sector counts about 13.000 companies, nearly 100,000 employees and a turnover of about 24 billion, which is about 8.6 % of GDP³.

Negotiations are primarily carried out at industry level between the unions and the Chambers of Commerce (WKO). The Chambers include legal bodies representing employers in almost all industries, to which all employers must belong by law. Hence, the agreements signed cover more than 95% of workforce⁴. In ICT sector, UBIT is the public legal entity, part of the Chambers of Commerce, which concluded the collective agreement with the relevant GPA-dj covering all IT companies and employees in Austria.

Employers' associations

Title	Scope	Focus	Size	In short
ISPA www.ispa.at	N	ICT	over 200 members	The Austrian association of Internet Service Providers, founded in 1997, is the major voice of the Austrian Internet industry. Its main goal is to shape the economic and legal framework supporting the optimal development of the Internet and Internet services as well as to foster their use as an important social skill.
iv - industriellenvereinigung www.iv-net.at	N	General	about 4,200 members	The Federation of Austrian Industries (IV) is a voluntary body representing the interests of the Austrian industry at national and European level. Even if not focused on IT sector, it is actively involved at national and international level in the dialogue and actions on socio-economic affairs such as labor market, internationalization, tax structure reform, skill and education, industrial policy.
UBIT www.ubit.at	N	ICT+	About 60.000 of which 31.000 for IT.	It is the public legal entity representing all companies and self-employed persons who have a License in providing Services, in Management Consulting, in Accounting and Information Technology. It is locally structured at both state and federal level. It is also part of the Chamber of Commerce (WKO) with the exclusive right to conclude collective agreement in the related sectors. The collective agreement signed with the Union GPA-dj covers all IT companies and all IT employees in Austria.
VITE Vienna IT Enterprises www.vite.at	L	ICT	•	Vienna IT Enterprises (VITE) is the network for IT-companies, research-, development- and education institutions, established and financed by the municipality of Vienna. Its purpose is the active promotion of the ICT business in Vienna, as well as similar institutions do in the other federal states.
VÖSI www.voesi.or.at	N	ICT	about 40 members	The Association of Austrian software industry gathers medium and large software providers. It promotes the sector in Austria, offers itself as an information and communication platform on crucial industry topics. It cooperates closely with other organisations such as IV, the Federation of Austrian Industries, and UBIT.

²http://www.eurofound.europa.eu/eiro/country/austria_2.htm

³ADV ICT Position Paper 2013, March 2013, www.adv.at

⁴<http://www.worker-participation.eu/National-Industrial-Relations/Countries/Austria/Collective-Bargaining>

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ISPA	X	X	X		X	
iv - industriellenvereinigun g	X	X		X	X	
UBIT	X	X	X	X	X	X
VITE Vienna IT Enterprises	X	X		X		
VÖSI	X	X	X		X	

Workers' associations

Title	Scope	Focus	Size	In short
GPA-DJP Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier www.gpa-djp.at	N	General	•	The GPA-DJP represents the interests of employees, apprentices, pupils and students, and the journalists and all workers in the graphics industry and the paper and board industry. Among social groups, it supports <i>work@IT</i> , the community for people interested in IT jobs.
GPF Gewerkschaft der Post- und Fernmeldebediensteten www.oegb.at , www.gpf.at	N	ICT	more than 50.000 members	The Union of Post and Telecommunications (GPF) negotiates collective agreements for the staff of the Austro Control and the Post and Telecom companies.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture....)
GPA-DJP			X	X		X	
GPF		X					

Other organisations

Title	Scope	Focus	Size	In short
OCG Austrian Computer Society www.ocg.at	Nat.	ICT	1.650 members, 1.500 of which individuals and the remaining from industry, research, education and Public Administration.	The Austrian Computer Society (OCG) is a nonprofit association to promote information technology in regard to their interactions with people and society. It is in Austria the certification body for the ECDL and acts as an ICT platform to seek close contacts with organisations, companies and institution representing the industry, the research and the education. It collaborates with international body and federations.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
OCG	X	X	X			

Belgium

Belgium boasts of experience in different ICT domains such as: nano and micro-electronics; financial security solutions & smart card technology; telematics, cartography & local based services; TLC and network equipment; digital audio-video products; software. ICT sector is esteemed to be around 4% of GDP and addresses about 20% of the research efforts, employing more than 150.000 people, about 3,4 % of Belgian employment ⁵.

More than half the Belgian workforce is unionised in a positive growing trend. Collective bargaining is esteemed to cover 96% of the overall sectors. It is highly structured at three levels - central, industrial, company- with a major role played by the state. Negotiations at national level normally set a two-year binding framework. At industrial level the unions and the employers' federations negotiate in Joint Committees. The decisions bind on all employers in the industries they cover. The company agreements have increased in recent years and currently around a third of companies have their own agreements, although they may only agree improvements on what has been negotiated at the upper levels and mainly deal with topics other than wages.

Employers' associations

Title	Scope	Focus	Size	In short
AGORIA www.agoria.be	N	ICT+	over 1,600 companies	Agoria is Belgium's largest employers' organisation and trade association in the technology industry. The business community includes: Communication Solutions; Office; IT solutions; Consumer Electronics; Professional Electronics; Medical Electronics. Assectoral part of FEB, the Federation of Enterprises in Belgium, its initiatives cover all aspects of companies' economic, social, legal and tax-related activities at federal, European and international level.
UNIZO Belgian Federation of SMEs www.unizo.be	N	General	over 82.000 members	UNIZO is the Organisation for the Self-Employed and SMEs. UNIZO members include: craftsmen, service providers, liberal professions, companies in the commerce and distribution (retail) sectors.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
AGORIA	x	x		x	x	x
UNIZO Belgian Federation of SMEs				x	x	x

Workers' associations

Title	Scope	Focus	Size	In short
SLFP - Belgacom Group www.sfp-vsobelgacom.be	N	ICT	-	The Belgacom Group of the Free Trade Union of Public Service represents all categories of staff working on behalf of the Belgian national telecommunications operator. The group is representative since 1989 and currently has two representatives in the National Joint Commission.
CGSLB-ACLVB Centrale Générale des Syndicats Libéraux de Belgique www.cgsלב.be	N	General	more than 289.600 members	The CGSLB is a multi-industry organisation. It is structured by sectors as follows: Food & Distribution; Transport; Chemicals; Financial services; Timber, Building & Industry; Gas & Electricity; Metallurgy (in which end products such as TV, PC); Textile; Services (in which audio-visual); Non-Trading.

⁵Forum „INFORMATION TECHNOLOGY IN GOVERNMENT“, Chisinau, January 16th 2012. Presentation held by Mr. Jan Deprest

LBC-NVK Landelijke Bediende Centrale - Nationaal Verbond voor Kaderpersoneel http://lbc-nvk.acv-online.be	N	General	320.000 members	LBC-NVK is the largest trade union federation within the ACV. It represents employees and managers from the private sector in Flanders and Brussels, as well as the interests of workers in most non-profit sectors. It includes five collective sectors: non-profit (34%); services sector (28%); industry (19%); Distribution (13%); finance (6%).
CNE-CSC Centrale Nationale des Employés www.cne-gnc.be	N	General	167.000 affiliated	It organizes and promotes the employees and officers of all private sector (and some cases the workers as well) in: industry (i.e. steel, chemicals, gas, electricity); trade; finance (banking and insurance); the non-profit (i.e. hospitals, nursing homes, universities, youth welfare, early childhood); Business Services (i.e. informatics, cleaning, wholesale trade, security, garages) and other service sector such as: logistics, distribution drugs, social secretariats, etc.)
CSC - TRANSCOM Transport and Communication http://csc-transcom.csc-en-ligne.be	N	ICT+	-	CSC-Transcom, born in 2001 as a merge, represents the interests of eight different groups: culture, diamonds, post, railways, the telecom, mobility, transport, road and water. The telecom sector CSC - Transportation and Communication (CSC - Transcom) is responsible for Belgacom and Belgian Institute for Post and Telecommunications (BIPT) .
CGSP-T Centrale Télécom Aviation www.acod.be/code/fr/frame910d.html?id_page=8	N	ICT+	260.000 members	It is the branch of the CGSP trade union devoted to Telecommunication and Aviation sectorial companies.
SETCa-BBTK Syndicat des Employés, Techniciens et Cadres de Belgique www.setca.org	N	ICT+	-	SETCa is the oldest trade union organization of employees, technicians and managers. It covers different sectors: trade, finance (banks, public credit institutions and insurance companies), industry, not-for-profit (Healthcare educators, culture, free education, etc.), logistics, information and communication.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
SLFP - Belgacom Group			X	X			X
CGSLB-ACLVB							X
LBC-NVK							X
CNE-CSC		X					
CSC - TRANSCOM		X					
CGSP-T	X						X
SETCa-BBTK			X	X			X

Bulgaria

SMEs play a big role in the Bulgarian economic fabric. ICT sector counts over 1.000 enterprises the half of which are responsible of 97% of the total revenue. Beside the overall negative trend since 2009-2010, ICT sector – including hardware, software and services – has registered general inferior decrease with even partial growth in specific subsector such as network equipment, production and software. ICT sector generates around 10% of the national GDP, of which two third are attributable to TLC and the remaining to IT. Sectoral employment is about 1,36% of the national workforce⁶.

Despite the efforts made by the government and unions to increase their importance at national level, collective bargaining are primarily at company and secondarily at industry level. In general, the typical structure sees an industry level agreement providing a basic framework and a company/organisation level agreement setting out the key details. The overall collective bargaining coverage is esteemed around the 30% with high variability between industries and public/private sectors. Some sectors are not covered at all. Collective agreements exist in Post and Telecommunication, but not explicitly in ICT where big companies such as HP and IBM negotiate directly with their own Unions present in the workplace and SMEs' workers are often not properly represented. On the whole, it's esteemed that the participation of employees in unions is around 20%⁷. Even if Bulgaria has a tripartite council, there is no collective bargaining at national level as well as a national social dialogue in ICT doesn't exist.

Employers' associations

Title	Scope	Focus	Size	In short
BAIT - Bulgarian Association of Information Technologies www.bait.bg	N	ICT	about 135 members; 69% of the national ICT market	BAIT is the biggest, most representative and influential branch organization in the sphere of information and communication technologies in Bulgaria. The Association includes companies in the trend of hardware, software, system integration, networks, telecommunications, Internet suppliers, etc.
BWA Bulgarian Web Association www.bwa.bg/en	N	ICT	65 companies	BWA is a branch organization, established in 2004, representing leading companies on the Bulgarian web market which work on design, development and hosting of web sites, as well as on providing services and information via Internet.
CEIBG The Confederation of Employers and Industrialists in Bulgaria (KRIB) www.ceibg.bg	N	ICT+	over 10 500 companies.; 75% of the national GDP	KRIB is a nation-wide organisation representing companies in all big economic sectors. It has an internal ICT and e-Government Committee and a specific working group of ICT leading executives which interacts with the Government to pursue consistent policy and strategy in the ICT field as well as to rapid development of e-government in Bulgaria.
BASSCOM Bulgarian Association of Software Companies www.basscom.org	N	ICT	about 55 memberassociates	BASSCOM is the industry association of leading Bulgarian software development companies.
UPEE Union for Private Economic Enterprise www.ssibg.org	N	General	-	It is a non-governmental employers' organization of companies in the micro, small and medium business. It was founded in 1989 by the first developers in Bulgaria to promote a business and represent the collective interests of employers in the labor market and industrial relations.

⁶ ITA Italian Trade Agency, ICT Information and Communication Technology in Bulgaria, March 2012.
www.ice.gov.it/paesi/europa/bulgaria/

⁷<http://www.worker-participation.eu/National-Industrial-Relations/Countries/Bulgaria>

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
BAIT	X	X	X		X	
BWA	X	X	X	X	X	
CEIBG	X	X	X		X	X
BASSCOM	X	X	X		X	
UPEE	X			X	X	X

Workers' associations

Title	Scope	Focus	Size	In short
CITUB Confederation of Independent Trade Unions www.knsb-bg.org	N	ICT+	35 federations, trade unions and associations	CITUB brings together 35 federations, trade unions and associations and a number of associate members. It represents different sectors such as: electronics, engineering and informatics; Tourism and Services.
PTT-PODKREPA Fédération des PPT Podkrepa www.podkrepa.org	N	ICT+	Around 150.000 members	Post and Telecommunication branch in PODKREPA confederation.
TUFC	N	ICT		It is the Trade Union Federation of Communications.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
CITUB	X						X
PTT-PODKREPA		X					
TUFC	X						

Other organisations

Title	Scope	Focus	Size	In short
PROMYANA Union http://promyana-bg.org	N	General	20 TUs, Civic and Professional-Class Organisations; 28 Regional organisations	<p>Promyana Association is the first organisation of a similar sort to be registered in Bulgaria comprising trade union, professional-and-class and civic structures.</p> <p>The main goal is the reformation of the system for social dialogue in the country, for searching and finding effective means and ways of solving the social and economic problems in Bulgaria.</p> <p>The membership counts: Union of Power Engineers in Bulgaria; National Union of Dockers and Port Seamen; Bulgarian Physicians' Union; Miners' Federation; Teachers' Trade Union in Bulgaria; Railwaymen's Trade Union, Trade Union of Autotransport Workers; National Union of Shipping Agents; Bulgarian Association of Hotels and Restaurants; National Trade Union of Private Contractors etc.</p>

BSMEPA The Bulgarian Small and Medium Enterprises Promotion Agency www.sme.government.bg	N	General	-	Established in 2004 with the Ministry of Economy and Energy of Republic of Bulgaria, BSMEPA is a Government institution and its main functions are focused on the implementation of the Bulgarian Government's policy for small and medium enterprises (SME). The Agency provides to Bulgarian SMEs information and consulting services, organizes training courses and implements promotion activities in supporting the increase of SMEs' competitiveness and strengthening their international positions. It acts as a working link between public administration, business and NGO's.
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Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
PROMYANA	x	x				x
BSMEPA	x	x		x	x	

Croatia

The economy is characterised by a substantial tertiary sector for almost 70% of GDP and the secondary sector (industry, mining, energy supply and construction) for more than 25%⁸. ICT sector counts about 4.2% of GDP⁹ and an employment rate of about 1,5-2%.

The state plays the main important role in industrial and labour relations. Although it is esteemed a notable coverage rate (about 60%¹⁰) of collective bargaining, union density and union membership (about 35%), collective agreements are mainly negotiated at both industry and company level and cover primarily the public sector. No economy-wide agreement seems to exist. Anyway, a tripartite economic and social council brings together unions, employers and government, which take part in the country decision-making process.

Employers' associations

Title	Scope	Focus	Size	In short
CEA Croatian Employers' Association www.hup.hr	N	ICT+	-	CEA, established in 1993 as a voluntary, non-profit and independent employers' association, has been since 1994 the only employers' representative within the national Social-Economic Council, the highest tripartite social body for social dialogue in Croatia. It is structured in 29 branch associations advocating for specific economic sectors among which the ICT association.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
CEA	X	X	X	X	X	X

Workers' associations

Title	Scope	Focus	Size	In short
HST	N	ICT	•	It is the Croatian Trade Union of Telecommunication
SOMK www.sssh.hr	N	General		SOMK is the Trade Union of Education, Media and Culture of Croatia.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
HST		X					
SOMK			X				X

⁸http://www.eurofound.europa.eu/eiro/country/croatia_2.htm

⁹Figures referred to 2012 from Croatian Agency for Investment and Competitiveness, www.aik-invest.hr/en/sectors/ict/

¹⁰<http://www.worker-participation.eu/National-Industrial-Relations/Countries/Croatia>

Other organisations

Title	Scope	Focus	Size	In short
cro.ict www.cro-ict.net	N	ICT	70 companies with around 700 employees.	It is the Association of Croatian ICT Clusters. Founded in 2007 on the initiative of six regional ICT clusters from Rijeka, Čakovec, Varaždin, Split, Osijek and Pula, and three more associations, it counts partners such as regional development agencies, business incubators and technological parks and its main supporters are the Business Innovation Center of Croatia (BICRO) and the German society for technical cooperation (GTZ). The main objectives are to contribute in developing the ICT national industry and society, lobbying and increasing export.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
cro.ict	x	x	x		x	

Cyprus

Cyprus economy is made of Services for more than 70% of GDP and Industry for over 25%¹¹. ICT is an important component so much as the government of Cyprus has identified ICT as one of the country's priority growth sectors and has developed a Digital Strategy and Action Plan for immediate implementation, including the promotion of a new large scale Science Technology Park¹². ICT sector includes both major multinational firms, headquartered in Cyprus, and SMEs and counts highly skilled and qualified workforce.

Collective bargaining has traditionally played a leading role in regulating industrial relations, based primarily at industry and company level with the direct negotiation between the employer organisations and the trade unions. The state maintains mainly an advisory role even if it may intervene for mediation. Rare exceptions concern when the state regulates by legislation minimum standards of basic terms and conditions of employment. On the whole there is widespread collective bargaining in the public and semi-public sector. In ICT regulation seems to concern primarily the qualification issues and mainly refer to the Public Sector.

Employers' associations

Title	Scope	Focus	Size	In short
CCCI - Cyprus Chamber of Commerce and Industry www.ccci.org.cy	N	ICT+	about 8.000 enterprises and over 140 professional associations	The CCCI is the union of Cypriot businessmen, the interests of whom it promotes by submitting to the government and to the Parliament the members' positions. Through the participation in tripartite bodies and committees, it conveys and promotes the views of the business community. It covers the whole range of business in all sectors of the economy. Among the associations in the Services, it includes the "Cyprus Association of Information Technology Companies".
CITEA Cyprus IT Enterprise Association www.citea.net	N	ICT	47 companies; over 90% of the local ICT market.	Created in 1987 by the Cyprus Association of Information Technology, CITEA is now member of Employers and Industrialists Federation (OEB). CITEA is considered the prime representative of the ICT industry in Cyprus.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
CCCI	x	x	x	x	x	x
CITEA	x		x	x	x	

Workers' associations

Title	Scope	Focus	Size	In short
EPOET	N	ICT	•	It is the Free Pancyprian Organisation of Telecommunication Employees

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
EPOET		x					

¹¹Figures related to 2011, Source: World Bank national accounts data and OECD National Accounts data files.

¹² Cyprus Investment Promotion Agency (CIPA), www.investcyprus.org.cy

Other organisations

Title	Scope	Focus	Size	In short
CCS Cyprus Computer Society https://ccs.org.cy/	N	ICT	over 1.200 members	CCS is a professional and independent non-profit organization, seeking to improve and promote high standards amongst informatics professionals, in recognition of the impact it has on employment, business, society as well as on the quality of life of the citizen. Its main objectives are: to be the main network of IT Professionals in Cyprus; to become the leading independent IT Certification Organisation; to raise the profile and promote Cyprus' informatics professionals to other National, European and International Organizations and Institutions; to promote the development of the Information society at all levels through digital literacy, skills, education and training, research, and professionalism.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
CCS	X	X	X		X	

Czech Republic

ICT plays an important and growing role in the Czech economy. Sectorial employment rate is about 4%, mainly referred to IT Service and, secondly, to Manufacturing and Telecommunication¹³.

There is a scarce unionism in the country with a participation rate of about 17%. Collective bargaining are mainly at company level and covers around 40% of employees in the Czech Republic. Industry level agreements cover some industries. In ICT sector neither specific agreement nor dedicated unions beside Post & Telecommunication can be found.

Employers' associations

Title	Scope	Focus	Size	In short
Czech ICT Alliance www.czechict.cz	N	ICT	about 150 IT companies	It was established in 2005, under the supervision of the Czech Governmental Agency CzechTrade to promote Czech ICT companies to foreign customers. Its main activities are addressed to support business development at national and international level.
EIA www.electroindustry.cz	N	ICT+	57 companies; 70% of national electrical production market.	EIA is a free union of entrepreneurs and employers and associates the most significant domestic producers and suppliers of the electrical and electronic industries as well as of information technology. Its members include both domestic branches of large international corporations and also medium and small enterprises.
Czech Chamber of Commerce www.komoracz.eu	N	General		The Czech Chamber of Commerce includes 4 main industry sectors: Trade and Tourism; Industry and Transportation (i.e. engineering, metallurgy, food and manufacturing industry); Business and Other Services (i.e. advertising and marketing; consultancy; telecommunication, technical safety and fire services); Construction, technical crafts and technical equipment.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
Czech ICT Alliance	x	x			x	
EIA	x	x	x	x	x	x
Czech Chamber of Commerce	x	x		x	x	

Workers' associations

Title	Scope	Focus	Size	In short
ECHO www.os-echo.cz	N	General	•	ECHO is the energy and chemistry workers' union.
OS ZPTNS	N	ICT+	-	Trade Union of workers in Postal, Telecommunication and Newspaper Services

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
ECHO							x
OS ZPTNS		x				x	

¹³Figures related to 2010, Czech Statistical Office, www.czso.cz

Denmark

Although Denmark was originally an agriculture based country, nowadays the national economy is mainly characterised by services, manufacturing and high-tech industry (i.e. biotech). ICT establishments are esteemed to be more than 15.000, about 6,6%, employing around 7% of overall workforce. The sector counts a turnover of around 5%¹⁴.

Union participation is high in Denmark (67%) even if it has registered a downtrend in recent years. The principal level for collective bargaining in Denmark is the sectorial level, with company negotiations becoming increasingly important. National bargaining generally provides a framework for the collective agreements at industry level. Overall 80% of employees are covered by collective bargaining. In ICT sector, unionism has developed, on one side, as a further branch inside the existing metalworkers' Unions; on the other, as a new organisation specifically addressed to IT professionals.

Employers' associations

Title	Scope	Focus	Size	In short
DI ITEK http://itek.di.dk	N	ICT	about 300 members	DI ITEK is the Danish ICT and electronics federation for IT, telecommunications, electronics and communication enterprises.
ITB www.itb.dk	N	ICT	about 300 IT companies	The Danish IT Industry Association is the largest and leading independent representative for the IT-business community in Denmark. It is the oldest association in its field, established since 1920 by the importers of office machines and equipment and progressively incorporated importers and producers of software and computer equipment up to companies providing infrastructure and content for the Internet and mobile networks after 2000.
it-forum midtjylland www.itforum.dk	N	ICT	over 470 companies, representing over 20.000 IT people from CEO to programmers	It is a membership based network of private and public organizations, colleges, and local, regional and state authorities in Region Midtjylland. Its members share an interest in adopting smart ICT technologies for innovating purposes and in order to improve their businesses.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
DI ITEK	x	x	x		x	
ITB	x	x	x	x	x	
it-forum midtjylland	x		x			

¹⁴ Figures of 2011, Statistics Denmark, <http://www.dst.dk/en/Statistik/>

Workers' associations

Title	Scope	Focus	Size	In short
DANSK META www.danskmetal.dk	N	ICT+	About 114.500 members	It is the Danish Metalworkers' Union representing workers in the manufacturing, building and construction, IT and telecommunications and service industries, in enterprises throughout Denmark.
DEF Danish Union of Electricians www.def.dk	N	General	About 30.000 members	The Danish Union of Electricians addresses the electrical industry and has 13 local branches operating in such industry: industrial automation, supply plants, domestic appliances and refrigeration, security and alarm systems, elevators, electrical installations and aerials, IBI and CTS systems, satellite, telephone and data systems within the private as well as the public sector.
HK www.hk.dk	N	ICT+	About 300.000 members	Founded in 1900 with the purpose of organising commercial and clerical employees, members working in different roles in the private and public sectors such as: Office employees; Trade and commercial employees, shop and warehouse staff; Laboratory technicians; Medical secretaries and Dentists' assistants; Bilingual/trilingual secretaries; Freelance employees; Computer operators in the private and public sector; Students in part-time employment or at business/technical colleges and schools. Included in HK, SAMDATA is a union that provides professional assistance and handles the interests of IT trained persons.
IDA The Society of Danish Engineers http://ida.dk	N	General	About 88.000 members	It is a trade union for technical and scientific professionals as well as students. It represents the interests of employees, managers, the self-employed and pensionists within the fields of pay and employment, the labour market, industrial policy, skills, careers and training, the working environment, technology and research.
PROSA www.prosa.dk	N	ICT	About 14.000 members	It is the Danish Association of IT Professionals. It stands out as the leading interest group and labour association for organised IT Professionals in Denmark.
TL National Union of Technicians www.tl.dk	N	ICT+	About 30.000 members	The Danish Association of Professional Technicians is a trade union for technicians and designers. Its members are salaried employees, freelancers and self-employed, all working with construction, planning, engineering, design or calculation. It organises 13 professional networks amongst which the nets dedicated to: IT and Electronics; Arts&Multimedia; Energy.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
DANSK META	x	x					x
DEF		x		x			x
HK	x				x		x
IDA					x		x
PROSA	x						
TL	x				x		

Estonia

Since regaining independence from the Soviet Union in 1991, Estonia has developed into a leading producer and consumer of ICT solutions, particularly in the area of e-government, but also in the private sector. The majority of employees in Estonia work in the services sector (63% of total employment), while 33% are employed in industry and the remaining 4% in the agricultural sector. The Estonian economy is characterised by a high proportion of small-sized enterprises, the most of which (about 98%) have less than 50 employees. With its policies and innovative initiatives the Estonian Government has helped companies make the information technology sector one of the fastest growing in the country. ICT sector counts about 5.3% of national GDP¹⁵ with over 2.600 companies (around 5%) and over 18.000 workers (around 4,2%)¹⁶.

Trade union membership levels are not very high (10%). For the majority of employees in Estonia, working conditions and pay are directly discussed between the employer and the individual worker. Collective bargaining covers around 30% of employees and mostly takes place at company level between unions and individual employers. At national level, minimum wages are negotiated annually and sectorial agreements are only reached in some economic sectors – mostly transport and healthcare reached in 2012.

Employers' associations

Title	Scope	Focus	Size	In short
ITL Estonian Association of Information Technology and Telecommunications www.itl.ee	N	ICT	65 ICT companies	ITL is a voluntary organisation, whose primary objective is to unite the Estonian information technology and telecommunications companies, to promote their co-operation in Estonia's development towards information society, to represent and protect the interests of its member companies and to express their common positions.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ITL	x	x	x		x	

Workers' associations

Title	Scope	Focus	Size	In short
ESTAL Estonian Communication and Service Workers' Trade Union www.estal.ee	N	ICT+	more than 2000 members	ESTAL unites workers from Estonian major communication, post, service and telecommunications companies. Its purpose is to unite them to common alliance, to negotiate with their working- and salary conditions, improvement of social conditions, education, professional training, retraining respecting equality, legality and the principles of solidarity. It comes out from the past Trade Union of Postal and Telephone Workers, founded in 1919."

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
ESTAL		x					x

¹⁵ Figures 2012, <http://estonia.eu/about-estonia/economy-a-it/economy-in-numbers.html>

¹⁶ Figures 2011, Statistics Estonia, <http://www.stat.ee/subject-areas>

Finland

Finnish economy counts more than 260.000 companies, 93% of which micro-enterprises that employs one fourth of the workforce and is responsible for 20% of the overall turnover¹⁷. No more than 1% are large and medium companies which determine more than 60% of employment and produce around the 64% of the national turnover. The IT industry's enterprises in Finland employ 48.000 people and have a combined turnover of about EUR 6,4 billion Euro¹⁸.

Union density is high in Finland, with almost three-quarters of employees in unions and a collective agreement coverage of about 91%. A collective agreement for the IT Services sector was signed in 2011. It has been renewed for the period 2013-2016 and signed by the Federation of Finnish Technology Industries, the Association of IT sector employees and the Federation of Professional and Managerial Staff (YTN). It binds on all the employees of the sector and includes local arrangements and negotiations at company level on salary settlement.

Employers' associations

Title	Scope	Focus	Size	In short
FFE Federation of Finnish Enterprises www.yrittajat.fi	N	General	over 116.000 companies	The Federation of Finnish Enterprises is a nation-wide network, representing mainly small and medium sized enterprises from different branches: service; trade; industry; construction; transportation.
FTTI Federation of Finnish Technology Industries www.teknologiateollisuus.fi	N	ICT+	around 1100 companies	FTTI is an industry association for companies in the metals industry, the mechanical engineering and metal products industry, the electronics and electro- technical industry and the information technology industry. The mission is to ensure that the Finnish technology industry has the preconditions for success in the global marketplace.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
FFE	x	x		x	x	
FTTI	x	x	x	x	x	x

Workers' associations

Title	Scope	Focus	Size	In short
ERTO Federation of Special Service and Clerical Employees www.erto.fi	N	ICT+	around 17.000 members	It is an organization of employees working in expert positions in the private service sector. Members represent a wide variety of fields, such as information technology, transportation, advertising, market research, digital media, health care and social services, financial management, physical exercise, culture, free-time activities and other special fields.
METALLI Finnish Metalworkers' Union www.metalliliitto.fi	N	ICT+	around 158.000; about 90 % of the blue collar workers in the metal industry	Founded in 1899 it is the largest union of industrial workers in Finland. It negotiates collective agreements for separate sectors such as: technology industry (e.g. engineering, shipbuilding, iron and steel industry, electronic industry, car manufacturing), telecommunication industry, mining, electricity and power plants.

¹⁷Statistics Finland, Business Register 2010

¹⁸ Data from FTTI, <http://www.teknologiateollisuus.fi/en/branches/it.html>

PRO www.proliitto.fi	N	General	130.000 members	Trade Union Pro is the largest private sector union for clerical employees and the largest member union of the Finnish Confederation of Professionals STTK. It negotiates 60 collective agreements (January 2011) and includes 255 unions.
SEFE Finnish Association of Graduates in Economics and Business http://www.sefe.fi	N	ICT+	about 50.000 members	Originally founded in 1935, it is a central organization for graduates and students in economics and business administration. It supports collective agreements in different sectors as: Food industry; Energy sector; ICT sector; Information logistics; Organisation; Commercial sector; Chemistry; Church; Municipal sector; Financing; Building trade; Technology industries; IT services; Auditing and consultation field; Government; Communications and logistics; University sector.
TEK Academic Engineers and Architects in Finland www.tek.fi	N	General	about 73.500 members	Its members are Masters of Science in Technology or other professionals working in the field of technology; furthermore, students of technology or natural sciences. On behalf of its members TEK negotiates and concludes collective agreements concerning salaries and conditions of employment in industry and in the service and public sectors.
Association of IT sector employees www.tietoala.fi	N	ICT	-	It is the biggest representative of employee's rights in IT sector and it is member organization of UIL, Union of Professional Engineers in Finland. Association of IT sector employees negotiates the collective agreement with the employers' union, the Federation of Finnish Technology Industries.
KTK Union of Technical Professionals www.ktk-ry.fi	N	General	about 10.500 members	KTK is Finland's most notable Trade Union (and in practice, the only one) for Professionals in Municipal Technology. KTK encompasses over 90 percent of all Technology Professionals in municipalities and federations of municipalities. KTK is also the biggest organisation of Public Sector Technology in Akava (Confederation of Unions for Professional and Managerial Staff in Finland).
UIL Union of Professional Engineers in Finland www.uil.fi	N	General	approximately 70.000 members	UIL promotes the interests of engineers, engineering students and other experts of technical field. The members work in responsible expert and management duties in industry, engineering and consulting engineering offices, service sector and public sector.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
ERTO	x		x		x	x	x
METALLI		x		x	x		
PRO							x
SEFE	x	x			x		x
TEK					x		x
Association of IT sector employees	x						
KTK					x		
UIL					x		x

France

French economy is highly based on Services and Industry, where Information and Telecommunication technology – such as Telecom, Internet, audio-visual and equipment - plays an important and growing role, with more than 534.000 jobs in 2010 which are expected to triplicate within 2020¹⁹.

French trade union membership registers only 8% of employees, with a higher rate in the public sector. The context is divided into a number of rival confederations. Despite that, the overall coverage of collective agreement is more than 90%. The industry level is the most important one for collective bargaining, in terms of numbers employees covered, even if negotiations take place also at company level and national agreements may be also present settling on general frameworks. Unionism in ICT mainly covers the traditional Post & Telecommunication, Audio-visual and Services sectors as new branches or internal merge within the traditional union federations. Specific sectorial agreement covers IT, engineering consultants and consulting (known as SYNTEC) and telecommunications, apart from specific company agreements (i.e. Telecom France, IBM); while the metalworking agreement basically covers the hardware manufacturing companies.

Employers' associations

Title	Scope	Focus	Size	In short
SFIB Syndacat de l'Industrie des Technologies de l'Information www.sfib.org	N	ICT	15 companies	With the aim of promoting the development of industry of Information Technology and related services in the digital environment, SFIB acts as a source of proposals and consultation, maintaining contacts with key departments, state secretariats and various public and private bodies on issues such as intellectual property, research and innovation, copyright and copy private environment, legislative and regulatory framework.
SIMAVELEC - Syndicat des industries de matériels audiovisuel électronique www.simavelec.fr	N	ICT+	about 20 large companies	It is the association of companies in the audiovisual electronic industry. It is associated to the FIEEC federation of Electrical, Electronic and Communication industries. Among its activities for promoting the sector, it includes industrial relations of the company members.
UNETEL-RST Union Nationale des Entreprises de Télécommunications, de Réseaux et de Services en Télécommunications www.unetel-rst.com	N	ICT+	35 IT business companies	It represents actors in Telecommunications such as: TLC operators and companies; ISP; Cable operators; Distributors of audiovisual programs (excluding radio and television channels); Call centers whose majority capital is owned by a telecom operator.
GPNI - Groupement Professionnel National de l'Informatique www.gpni.com	N	ICT	•	The GPNI is the first Chambre Syndicale for IT services (Services Companies Computer Engineering) and brings together the CEOs of small and micro businesses since 1961. Its activities include: fiscal support; legal services; collective agreement.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
SFIB	x	x			x	
SIMAVELEC	x	x	x	x	x	x
UNETEL-RST	x			x		x
GPNI	x			x		x

¹⁹ EU Skills Panorama Analytical Highlight, <http://euskillspanorama.ec.europa.eu>

Workers' associations

Title	Scope	Focus	Size	In short
FAPT – CGT www.cgt-fapt.fr	N	ICT+		FAPT is the Posts and Telecommunications workers' union. It is structured in the two main branches: Posts and Telecommunication. It represents workers in 22 companies.
FIEEC Fédération des Industries Electriques Electroniques et de Communication www.fieec.fr	N	ICT+	about 30 professional unions	FIEEC brings together 30 trade unions in the Electrical, Electronic and Communication Industry. Its actions are addressed to: Industrial strategy for growth; Competitiveness for employment; Innovation for future markets.
CFDT-CADRES - Union Confédérale des Ingénieurs et Cadres www.cadrescfdt.fr	N	General		CFDT CADRES is the first union for executives and managers: managers, engineers, technical managers, salespeople, executives of public functions, experts, project managers, the scientific professions, etc..
CGT-FAPT - Fédération nationale des salariés du secteur des activités postales et de telecommunications www.cgt-fapt.fr	N	ICT		It is the branch of the CGT devoted to Post and Telecommunication sector.
F3C CFDT - Fédération Communication Conseil Culture www.f3c-cfdt.fr	N	ICT+		Born in reply to the digital convergence and the development of the Internet, it was settled from the merger of three CFDT branches: the FTILAC (Federation of the Communication and Culture); the FUPT (Post and Telecommunications); and the branch " Business Services ". It includes now different sectors: Advertising; Culture-Leisure ad Sport; Media; Post-Finance-Distribution; Telecom providers.
FEC-FO - Fédération des Employés et Cadres, Force Ouvrière www.fecfo.fr	N	General		It includes 10 sections from Bank; Insurance; Commerce up to Print, Editing and Advertising.
FNPSECP - Fédération CGT des Sociétés d'Etudes www.cgt.fr	N	ICT+	33 national trade associations and unions	CGT brings together 33 national trade associations , federations and national unions. These national professional associations are made up of unions within one or more professional sectors such as Federation of agro- food industries, Construction Federation and National Federation of Employees in the Post and Telecommunications sectors.
FO-CADRES - Union des Cadres et Ingénieurs www.fo-cadres.fr	N	General		It is the Union representing managers and engineers.
UGICT-CGT - Union Générale des Ingénieurs, Cadres et Techniciens www.ugict.cgt.fr	N	General		It is a managerial and professional Union belonging to CGT.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology- based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank- Insurance- Finance; Business; Tourism; Culture)
FAPT – CGT		x					
FIEEC		x		x			
CFDT-CADRES					x		
CGT-FAPT		x					
F3C CFDT		x	x			x	x
FEC-FO						x	x
FNPSECP		x					
FO-CADRES					x		
UGICT-CGT					x		

Germany

The main pillars of German economy are the manufacturing, construction and services sectors. For Germany ICT plays a decisive role for productivity in all industries. Measured by gross value added today, the ICT industry itself is ahead of mechanical engineering and motor-vehicle manufacturing. In employment terms, it accounts for 846.000 jobs. The strengths of the German ICT industry lie in software and embedded systems, frequently unknown to the public; and in high-quality, leading ICT products and services, generally more known, such as semiconductor chips from Europe's largest microelectronic cluster in Dresden. SMEs look to be an important player especially in the software industry where they earn a larger share of industry turnover than in other sectors²⁰.

Only a fifth of employees in Germany (18%) are union members even if the collective bargaining, principally conducted at industry level, has a higher coverage rate of about 62%. In ICT a specific sectorial agreement seems to be missed yet; whereas they are present, agreements occur at company level, in some case adapting the metalworking agreement. Worker representation in this sector has developed from the traditional Unions operating in either the Transport sector or the Service one.

Employers' associations

Title	Scope	Focus	Size	In short
BITKOM www.bitkom.org	N	ICT	over 2.000 companies ; 90 % of the ICT market	BITKOM is the Federal Association for Information Technology, Telecommunications and New Media in Germany. It represents and includes nearly all global players as well as more than 800 small and medium-sized enterprises and a lot of founder-managed creative companies.
BVDW German Federal Association of the Digital Economy www.bvdw.org	N	ICT	about 345 companies	BVDW is the organisation that represents the interests of companies in the field of interactive marketing and digital content. It has taken on the task of making the efficiency and the benefits of digital media transparent, and thus promoting their deployment in the economy as a whole, in society, and in administration. BVDW is engaged in continuous dialogue with politicians, the media and other interest groups.
BVMW German Association for Small and Medium-sized Businesses www.bvmw.de	N	General		The BVMW is a German association which caters for all commercial branches and professions, and represents the interests of small and medium-sized businesses in politics, with administrative authorities, with trade unions and with major companies.
ECO German E-Commerce Association http://international.eco.de	N	ICT	about 700 members	It is the Association of the German Internet Industry. ECO services aims to support markets, companies and Internet users alike. It develop markets, promote technologies and form frameworks. It acts as a seal of approval - ensuring quality standards, counselling services for members, and supports internet users and organisations who have questions on legal, safety and youth protection.
BITMi - Bundesverband IT-Mittelstande.V. www.bitmi.de	N	ICT	over 1.000 medium-sized IT companies	It is the Federal Association of IT SME Association (BITMi). It is active in all areas of the IT industry and includes both software developers and hardware manufacturers and system integrators and IT consulting companies.

²⁰ Federal Ministry of Economics and Technology, *ICT Strategy of the German Federal Government: Digital Germany 2015*, www.bmwi.de

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
BITKOM	x	x	x	x	x	
BVDW	x	x	x	x	x	
BVMW	x	x		x	x	
ECO	x	x	x	x	x	
BITMi	x	x	x		x	

Workers' associations

Title	Scope	Focus	Size	In short
TRANSNET www.transnet-archiv.org	N	ICT+	•	TRANSNET stands for Transport, Service and Networks. It historically represents the Transport sector. However, changes in German railways as well as the creation of independent areas within the industry have placed more importance on the service approach. Network refers not more than just the railway network, but it also represents the staff such as at Arcor and DB Telematik, companies in the telecommunication sector.
VER.DI - Vereinte Dienstleistungsgewerkschaft www.verdi.de	N	ICT+	approximately 2.1 million members	The Unified Service Sector Union includes different branches. Besides sectors such as Financial services, Health, Social services, Welfare and Churches; Education, Science and Research, others sectors included are: Media, Art and Culture, Printing and Paper, Industrial services and production; Telecommunications, Information technology, Data processing; Special services.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
TRANSNET		x					x
VER.DI	x		x			x	x

Greece

The Greek ICT market is service oriented and roughly 85% of the sector is focused on telecommunications.²¹

About a quarter of employees in Greece are union members, with a stronger position in the public and state-owned sector than in the private one. National bargaining lost power after the downturn of 2009-2010. Collective bargaining generally work at company level directly between employers and unions. In ICT main telecommunication companies have company agreements (i.e. OTE), while no bargaining results in software and service firms, mostly small and medium enterprise.

Employers' associations

Title	Scope	Focus	Size	In short
SEPE - Federation of Hellenic Information Technology & Communications Enterprises www.sepe.gr	N	ICT	over 300 members; more than 95% of national ICT Industry.	It is a non-profit organisation, established in 1995, representing the interests of the Greek ICT Enterprises to the Greek Government, the European Commission and other bodies of influence. The main objectives of SEPE are to promote Information and Communications Technologies (ICT) in Greece and to enlarge ICT Industry's market.
SEPVE, Association of Information Technology Companies of Northern Greece www.sepve.org.gr	L	ICT	220 companies	The Association of Information Technology Companies of Northern Greece (SEPVE), established in 1994, is a private non-profit organization representing interests of IT companies in the regions of Macedonia, Thrace and Thessaly. It promotes international cooperation and is devoted to establish business missions to South Eastern Europe and the Balkans.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
SEPE	x		x		x	
SEPVE	x	x	x		x	

Workers' associations

Title	Scope	Focus	Size	In short
OIYE - Greek Federation of Private Employees www.oiye.gr	N	General	about 55.000 members	Hellenic Federation of Private sector Employees organizes and represents workers in the main sectors of trade, services, shipping companies and tourist agencies, cleanliness, service enterprise storage and security, business informatics.
OME-OTE - Greek Telecom Employees' Federation www.ome-ote.gr	N	ICT	-	Founded in 1982 by an initiative of local unions, it is now a federation of Greek Employees from Telecom and other tertiary sectors.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
OIYE							x
OME		x					x

²¹Invest in Greece S.A., the official Investment Promotion Agency of Greece under the supervision of the Ministry for Development and Competitiveness, www.investingreece.gov.gr

Hungary

ICT is a fast growing sector in Hungary, representing 10-12% of the Hungarian GDP. ICT sector has constantly grown even during the economic downturn. The sector employs around 150.000 people, ranking third place in the EU. SMEs are important players, especially in software industry which together with ICT services represents 18% of total Hungarian export.²²

Hungary has a relatively low union density (about 12%) in a high competitive and rather fragmented general context. Collective bargaining primarily takes place at company level, despite considerable efforts to encourage industry level bargaining. Collective bargaining basically covers around one third of employees.

Employers' associations

Title	Scope	Focus	Size	In short
IVSZ - ICT Association of Hungary http://ivsz.hu	N	ICT	350 member companies; 80% of the sector	Founded in 1991, ICT Association of Hungary represents the common strategic objectives of the Hungarian information technology society. Started from a membership of businesses in the field of Telecommunication and electronics, it now includes key multinational and national players of the industry in Hungary and also a large number of Hungarian micro and small businesses. The SME sector, strong in software development, is one of the primary short-term objectives.
VOSZ - National Association of Entrepreneurs and Employers www.vosz.hu	N	General	45.000 members ; about 68 % of the GNP	The National Association of Entrepreneurs and Employers (VOSZ) is a non- governmental and nation-wide employers' association since 1989. It covers the whole sphere of the economy and its members are mostly SME's. Its scope of activities is related to social, labour and economic affairs.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
IVSZ - ICT	X	X	X		X	
VOSZ	X	X	X	X	X	X

Workers' associations

Title	Scope	Focus	Size	In short
TAVSZAK Telecommunication Union http://tavszak.hu	N	ICT	•	It was established in 2004 by the employees of telecommunication.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
TAVSZAK		X					

²² ICT Association of Hungary, <http://ivsz.hu>; Agenzia Ungherese per gli Investimenti e il Commercio, www.hita.hu

Ireland

Ireland is a small open economy, heavily dependent on international trade and foreign direct investment, especially from US multinationals. After the crisis of 2008, the ICT sector has to some extent recovered the job losses with a growing demand for mostly software engineering and computer associate professionals. The technology sector in Ireland directly employs over 105.000 people, with 75% employed in multinational companies – among which all of the top ten global technology companies - and the remainder in the indigenous digital technology sector. ICT is responsible for 40% of the national exports²³.

Union membership affects around one third of employees in Ireland (31%). Although a series of National Partnership Agreements existed and provided a non-binding framework for pay bargaining up to 2009, after the Ireland’s economic crisis, the country returned to a company level bargaining especially in the private sector. In ICT sector few company agreements seem to exist primarily in Telecommunications.

Employers’ associations

Title	Scope	Focus	Size	In short
ICT IRELAND www.ictireland.ie	N	ICT	-	ICT Ireland is the leading representative body for the technology sector in Ireland and is affiliated to the Irish Business and Employers Confederation (IBEC). Its membership is made up of the leading players in the Irish technology sector, as well as many early stage hi-tech companies and telecommunications companies. The vision of ICT Ireland is to maximise the contribution of these companies to Irish society and the economy. ICT Ireland is focused on: influencing policy; improving markets and supply chains; providing information and helping members to grow their business.
SFA www.sfa.ie	N	General	8.000 companies	The Small Firms Association (SFA) is the national organisation exclusively representing the needs of small enterprises (i.e. those employing less than 50 employees) in Ireland. The SFA secures the best deal for small firms by providing dedicated professional support and by offering an unparalleled range of services to members, including economic, commercial, employee relations and social affairs advice and assistance.
TIF Telecommunication and Internet Federation www.tif.ie	N	ICT	39 companies	TIF is the representative body for leading industry and associated interest groups in the field of electronic communications. TIF represents companies involved in fixed, mobile, wireless, fixed wireless, satellite and cable based service provisions, outsourcing and internet service provision.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ICT IRELAND	x	x	x	x	x	
SFA	x			x	x	x
TIF	x				x	

²³www.ictireland.ie

Workers' associations

Title	Scope	Focus	Size	In short
CPSU - Civil Public Service Union www.cpsu.ie	N	General	about 13.000 members	It is the Union for clerical and administrative grades in the Civil Service, wider Public Sector and the Private Sector.
CWU - Communications Workers' Union www.cwu.org	N	ICT	204.000 members	CWU is the biggest union for the communications industry in the UK. CWU members work in Royal Mail, the Post Office, BT, O2 and other telecommunication companies, cable TV, Accenture HR Services, financial services, and the Alliance & Leicester (now Santander). The members' expertise includes engineering, computing, clerical, mechanical, driving, retail, financial and manual skills.
PSEU - Public Service Executive Union www.pseu.ie	N	ICT+	10.000 members	It is the Trade Union for Executive Grades in the Civil Service and the wider public sector. Members are employed in the Civil Service, Eircom, An Post, the National Lottery, the Commissioners of Irish Lights, the Irish Aviation Authority, the Health and Safety Authority, the National Pensions Board and FAS.
SIPTU - Services Industrial Professional Technical Union www.siptu.ie	N	General	over 200.000 workers	SIPTU represents workers in both the public and private sector in almost every industry in Ireland and at virtually every level.
TEEU www.teeu.ie	N	ICT+	about 40.000 workers	TEEU is the Trade Union open to all categories of workers in technical, engineering and electrical employment's. The TEEU came into existence in 1992 arising from an amalgamation between the Electrical Trades Union and the National Engineering & Electrical Trades Union. It represents different employer categories among which IT specialists, professional and managerial, working in various sectors such as Transport, Aviation, Electronics, Energy.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
CPSU							X
CWU		X					X
PSEU		X					X
SIPTU				X	X	X	X
TEEU	X			X	X		

Italy

Italy has a diversified industrial economy with a predominance of Services. ICT plays an important role and the sector accounts for a high level of networking and initiatives to find effective strategies against the general crisis and European challenges of Digital Agenda. Although the economic downturn since 2009, the overall Global Digital Market in Italy – including telecommunication, digital content and all new components coming out from the convergence of new technologies - is worth around 58.060 million Euro of which the traditional IT market value –that’s HW, SW, Services-affects around 30%²⁴. Coherently, although the overall negative economic trends, investments record a specific positive increase on the IT innovative technologies and services such as Cloud computing, Big data, Internet of things and mobility, seen as strategic features for facing the current economical and digital challenges²⁵.

The country is characterised by a union density around one third of employees and by the presence of three main confederations (CGIL, CISL, UIL). The collective bargaining covers about 80%. There is no a specific collective agreement for ICT. Hardware manufacturing is generally covered by metalworking agreement. Telecommunications has own sectorial agreement since 2000, even if some firms, or parts of firms, apply metalworking agreement as well. Software and services companies apply variety of agreements from the commerce (especially SMEs), up to metalworking and crafts.

Employers’ associations

Title	Scope	Focus	Size	In short
ASSINTEL www.assintel.it	N	ICT	about 450 companies	Assintel is one of the largest associations of the ICT market, partner and catalyst for business Information & Communication Technology in Italy and reference point for the 780.000 companies belonging to the Tertiary Confindustria - Companies for Italy. The mission is to represent the member companies operating in the ICT market at authorities, agencies and national and international institutions and offer them services and special conventions. ASSINTEL is part of CONFCOMMERCIO-COMPANIES FOR ITALY the largest federal representative of the business of the Tertiary.
UNIMATICA www.unimatica.it	N	ICT		Unimatica is the Trade Association adhering to CONFAPI which includes Information Technology and related companies. Unimatica supports and upholds the member companies in the union, economic and scientific-technical affairs. It represents the companies against the major public and private institutions.
CONFESERCENTI www.confesercenti.it	N	General	Over 350.000 SMEs; over 1.000.000 people	Founded in Rome in 1971, Confesercenti is a major business association in the country and is a founding member of Enterprise Network Italy. It associate about 70 associations operating in Trade, Tourism, Services, Crafts and Industry.
CONFINDUSTRIA SERVIZI INNOVATIVI E TECNOLOGICI www.confindustriasi.it	N	ICT+	15.000 companies ; 400.000 workers in sectors representing about 10% of national GDP	Confindustria Innovative and Technological Services is the Italian Federation for all those businesses that create technological, professional, managerial, and organizational innovation. It was born from the fusion of FEDERCOMIN and FITA, respectively representing ICT and high-tech service companies. It represents businesses that offer consulting services, advertising, public relations and marketing, computer technologies, digital contents, e-media, engineering, internet, certification bodies, radio and television networks, research and surveys, satellite applications, training, technological and professional services. The Federation is organized in 35 Industry Associations and 50 Local Organizations.

²⁴ Rapporto Assinform sull’informatica, le telecomunicazioni e i contenuti multimediali, 2012, Assinform.

²⁵ Assintel Report 2013, Il mercato del software e servizi in Italia.

ASSINFORM www.assinform.it	N	ICT	over 450 direct and indirect associates	Assinform is the national association of Information Technology companies operating in Italy. The association is a point of reference for Italian businesses of all sizes and specializations: from software companies, to systems and equipment manufacturers, providers of applications, networks and services as well as Value Added Service and Information Technology related content providers.
ANITEC www.associazioneanitec.it	N	ICT+		It is the National Association of Computer Science, Telecommunications and Consumer Electronics industries. Member companies are framed in 5 product groups: Components for Installation of Antenna; Consumer Electronics; Information Technology; Tax Meters; Telecommunications
CNA - Comunicazione e Terziario Avanzato, Confederazione Nazionale dell'Artigianato e della Piccola Media Impresa www.cna.it	N	ICT+	about 670,000 associates	The CNA, National Confederation of Crafts and Small and Medium Enterprises, represents and protects the interests of small businesses, SMEs and all forms of self-employment. It includes 10 National branches: Food, Arts, Health and Wellness, Communications and Advanced Tertiary, Building, Fashion, Installation and Equipment, Production, Community Services.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ASSINTEL	x	x	x	x	x	x
UNIMATICA	x	x		x	x	x
CONFESERCENTI	x	x		x	x	
CONFINDUSTRIA SERVIZI INNOVATIVI E TECNOLOGICI	x		x		x	
ASSINFORM	x		x	x	x	
ANITEC	x	x	x		x	
CNA	x	x	x	x	x	x

Workers' associations

Title	Scope	Focus	Size	In short
FIOM-CGIL www.fiom.cgil.it	N	ICT+		The Metalworkers' union of the CGIL represents different sectors, including the Informatics-Telecommunication sector. The latter represents the workers in ICT companies such as ISP, SW and HW providers.
UIL TuCS Networkers www.sindacato-networkers.it	N	ICT		Sindacato-Networkers.it is the first online union, established by UIL-TuCS, addressing ICT professionals and workers.
UIL TuCS www.uiltucs.it	N	General		It is the union for Tourism, Trade and Services.
UGL – TLC www.ugltelecomunicazioni.it	N	ICT		The union represents workers in about 36 large companies in Information and Telecommunication sectors.
UILCOM www.uilcom.it	N	ICT+		It deals with the sectors of Information, Television, Sports and Entertainment and Telecommunication, including the agreement with TELECOM.

FISTEL CISL Federation of show-business, information and telecommunications workers www.fistelcisl.it	N	ICT+		The Fistel is the CISL trade union federation bringing together the workers of information (paper, printing, publishing, television) entertainment (cinema, audiovisual, music, theater) and telecommunications.
FILCAMS-CGIL - Federazione Italiana Lavoratori Commercio Turismo Servizi www.filcams.cgil.it	N	General		It is the commerce, hotels and services workers' union.
SLC-CGIL Sindacato Lavoratori Comunicazione www.slc.cgil.it	N	ICT		It is the union for workers in communication sectors.
FISASCAT-CISL - Federazione Italiana Sindacale Addetti Ai Servizi Commerciali, Affini e del Turismo www.fisascat.it	N	General		It is the Federation of Commerce, Services and Tourism industry workers.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
FIOM-CGIL	x				x		
UIL TuCSNetworkers	x						
UIL TuCS							x
UGL - TLC		x					
UILCOM		x					
FISTEL CISL		x	x			x	
FILCAMS-CGIL							x
SLC-CGIL	x						
FISASCAT-CISL							x

Other organisations

Title	Scope	Focus	Size	In short
AICA www.aicanet.it	N	ICT		AICA is the Italian Association for Informatics and Automatic Calculation and associates scholars and professionals in ICT. It operates in close collaboration with the ICT world, namely universities, research centers, industry players and institutions. Among its activities: sectorial publishing; European ICT certificates such as ECDL and EUCIP; training for ICT practitioners and future leaders.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
AICA		x	x		x	

Latvia

During the last few years, Latvian economy indicates the most rapid increase within the whole EU and even a positive national trend, although GDP is still almost 10% smaller than it was before the crisis in 2008²⁶. Its economic growth is essentially based on Trade and Services. A strong traditional culture in science and mathematics makes it competitive in intellectual and technical services among which ICT, which rapidly increased in the last years. In 2011, the share of the ICT sector in GDP constituted 3.3% with 3.370 companies, employing more than 18.300 persons²⁷.

Latvian unionism counts one confederation, LSAB, and a union density relatively low, at about 13%. Collective bargaining reaches 34% affecting mainly the public sector. There are few industry level agreements. ICT looks not to be covered. In general, the bargaining is mainly played at company level.

Employers' associations

Title	Scope	Focus	Size	In short
LTC Latvian Technological Centre www.itnet.lv	N	ICT	around 14 national/international companies in ICT sector.	LTC is an innovation and technology-oriented business support structure. As a business acceleration centre, it stimulates establishment and growth of knowledge-based SMEs, creates relationships between research and industry and encourages SMEs for trans-national cooperation. It is also active in drafting legislation.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
LTC	x	x	x		x	

Workers' associations

Title	Scope	Focus	Size	In short
LSAB Latvian Post and Telecommunications Workers Trade Union	N	ICT	•	It is the Latvian Post and Telecommunications Workers Trade Union and includes Telecommunication, Mail, Radio&TV, IT sectors.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
LSAB		x					

²⁶ The National Economy of Latvia – Macroeconomic review, 2013, Ministry of Economics of the Republic of Latvia Central Statistical Bureau of Latvia <http://www.em.gov.lv/em/2nd/?cat=30353>

²⁷ Economic Development of Latvia, Report 2012, Ministry of Economics Republic of Latvia <http://www.em.gov.lv/em/2nd/?cat=30353>

Other organisations

Title	Scope	Focus	Size	In short
Letera - Latvian Electrical Engineering and Electronics Industry Association www.letera.lv	N	ICT+	52 members	LEtERA is an independent, voluntary and non-governmental public organization founded in 1995. It unites companies, research and educational institutions, whose activities are related to Industry of Electronics and Electrical Engineering, Information and Communications Technology. LEtERA operates with several sectors of ITTE branch; supports cooperation with other branch associations in Latvia, as well as related organizations of European countries. Further goals are to facilitate the development of education and science, the foundation of new enterprises, the economic and technical development of existent enterprises, to create favorable environment for product innovations.
LIKTA The Latvian Information and Communications Technology Association www.likta.lv	N	ICT+	87 organisations and 134 professionals	LIKTA is a non-governmental professional association, founded in 1998, that regroups important ICT product and service providers and educational institutions, as well as individual professional members of the ICTE industry sector in Latvia, namely in computer hardware and software, electronics, and telecommunications infrastructure and service providers.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
Letera	X	X	X		X	
LIKTA	X	X	X		X	

Lithuania

The country has a very large ICT industry. It counts over 20.000 IT professionals and 13 out of the 20 largest IT companies in the Baltic States are based in Lithuania. Thanks to the high and a consequent nation-wide and potent IT infrastructure, it has been characterised for the last years by a rapid technological increase of services and by an educational system much oriented to ICT curricula development. It is expected that by 2015 products of IT and high-tech industries (i.e. biotechnologies, nanotechnologies and materials science) will constitute 25 % of Lithuania's GDP and 80 % of national export²⁸.

The participation of employees in unions is rather low at about 10% of all workers. Collective bargaining is virtually only at company or organisation level and even here the extent of bargaining is limited. On the whole, collective bargaining covers no more than 15% of employees.

Employers' associations

Title	Scope	Focus	Size	In short
LVDK www.lvdk.eu	N	General	more than 1800 enterprises and about 60 associated structures	Lithuanian Business Employers' Confederation is the biggest organization in Lithuania uniting small and medium business subjects, individual businessmen as well as regional and sectorial associations of SME's. The main branches represented are: retail trade, transportation, wood processing, food industry, textile, construction, car repairs, public catering, business services, etc.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
LVDK	X	X		X	X	

Workers' associations

Title	Scope	Focus	Size	In short
LCWTU - Lithuanian Communication Workers' Trade Union		ICT	•	It is the Lithuanian Unions representing post and telecommunication workers
LMPSS Lithuanian Unification of Metal Workers' Trade Unions http://www.litmetal.lt/en		General	-	The Lithuanian Union of Metalworkers represents members working in the field of engineering industry- metal products, machinery, bicycles, electrical and electronics.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
LCWTU		X					
LMPSS				X			

²⁸ Invest Lithuania, www.investlithuania.com

Other organisations

Title	Scope	Focus	Size	In short
INFOBALT www.infobalt.lt	N	ICT	over 130 members: national/global businesses, universities and colleges, research institutions, employing over 10.000 experienced ICT professionals, teachers and researchers.	Founded in 1994, INFOBALT is a locally and internationally recognized representative of Lithuanian ICT industry. It promotes use of Information and Communication Technologies' to benefit society, businesses and public sector. It participates in solving strategic issues for developing the ICT products and services market, facilitating exports and international activities. It advocates extensive ICT education to society through training and networking activities.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
INFOBALT	x	x	x		x	

Luxembourg

Luxembourg is a service-based economy (85.6 % of the Gross Value Added in 2012), a considerable share being taken by financial activities. The sector of information and communication is gaining importance, it represents about 6.6 % of GVA and share around 4% of the total employment. ²⁹Thanks to its central Europe location, its infrastructure, communication networks and high security framework for handling sensitive data, Luxembourg has become a centre of excellence for the activities of electronic trade and services and for the storage and distribution of electronic data. ICT also encompasses activities linked to Publishing, Audio-visual sector, as well as Computer programming, consultancy and information services.

In Luxembourg the participation in unions reaches 40% of the workforce, with a coverage rate of the collective agreements around 50%. The bargaining is at company and industry level, even if the latter are much fewer. Most of the larger ICT firms have company agreements.

Employers' associations

Title	Scope	Focus	Size	In short
APSI Association for Professionals in the Information Society www.apsi.lu	N	ICT	about 62 member companies	APSI is an active employer organization in the field of ICT. The mission is to inform, advise, represent and defend the interests of member companies and to participate in the promotion of the information society in Luxembourg.
FEDIL-ICT www.fedil.lu/fr/fedilict	N	ICT	-	Fedil-ICT is part of FEDIL the business federation multisectoral industry. It represents the leading players of the Luxembourg Information and Communications Technology sector and acts as the voice and the principal interest group of the digital technology industry. The member companies range from innovative SMEs to major ICT companies.
ICTLuxembourg http://ictluxembourg.lu	N	ICT	-	Founded in 2011 by APSI and FedilICT, ICTLuxembourg is the single voice for the ICT industry in Luxembourg, representing the interests of all national and international companies and supporting key initiatives. It works as a coordination platform and acts as the spokesperson for the ICT industry in Luxembourg when it comes to having contact with major authorities, such as the public agency Luxembourg for Business – Proud to promote ICT, or Ministries. ICTLuxembourg also participates in the business and trade missions organized by the Luxembourg government.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
APSI	X		X	X	X	
FEDIL-ICT	X	X	X	X	X	
ICTLuxembourg	X	X	X		X	

²⁹Luxembourg and ICT: a snapshot, Luxembourg for Business-Proud to promote ICT, <http://ict.investinluxembourg.lu/ict/luxembourg-and-ict-a-snapshot>

Workers' associations

Title	Scope	Focus	Size	In short
FLTL www.ogbl.lu	N	General	-	FLTL is the Union of Printing, Media and Culture. The union is also responsible for companies and organizations of artistic and recreational environment.
OGB-L - Confédération Syndicale Indépendante du Luxembourg www.ogbl.lu	N	General	-	OGB-L is present in all sectors of the Luxembourg economy.
SYNDICAT DES P&T http://syndicat-pt.lu	N	ICT	-	The union represents workers in the Post and Telecommunication sector.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
FLTL						x	x
OGB-L			x	x	x	x	x
SYNDICAT DES P&T		x					

Other organisations

Title	Scope	Focus	Size	In short
Luxembourg ICT cluster www.ictcluster.lu	N	ICT	46 Companies 4 Public research org. 5 other bodies	The Luxembourg ICT Cluster brings together various actors in the field of ICT in Luxembourg with the goal of fostering new and sustainable business opportunities through collaborative research, development and innovation projects. It aims at optimising the uptake of ICT as an enabling technology for various sectors and the further development of the existing ICT sector by encouraging networking and collaboration between the private and public sectors. The cluster provides specific support activities and services to its members and offers a platform for networking, collaboration and exchange of experience.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
Luxembourg ICT cluster	x	x	x		x	

Malta

ICT sector, including Digital Games Industry, e-Commerce, Media and Internet Law - have evolved rapidly in Malta over the past years and now constitute an integral part of the local economy. Employment in the ICT sector is esteemed around 4,5%.

Proportion of employees in unions is relatively high in Malta, at about 51%. Collective bargaining takes place at company level mainly in the private sector. Only the public sector normally negotiates common conditions across a range of workplaces. In ICT there is no collective agreement. Due to the shortage of experienced IT workers and, on the other hand, the high demand of companies for ICT jobs, bargaining in this sector is even likely to work more at individual level.

Employers' associations

Title	Scope	Focus	Size	In short
ITTS www.maltachamber.org.mt	N	ICT	-	It is the Information Technology Trade Section of the Malta Chamber of Commerce (MCCEI) and aims to: enhance the profile of the Business Section; engage with the Education authorities on various issues; monitor the State of the Industry.
MEA Malta Employers' Association www.maltaemployers.com	N	General	About 30% of market	The Malta Employers' Association (MEA) brings together employers from all sectors of industry and commerce in Malta. It is, in effect, the "trade union" of employers, formally registered as such under the Employment and Industrial Relations Act (2002). The principal purpose is the regulation of relations between employers and workers and trade unions. Its business sectors are: Banking, Insurance, and Finance; Beverages, Food and Tobacco; Construction, Electrical, Engineering and Metal; Electronics and Pharmaceuticals; General Manufacturing; Hospitality, Tourism and Travel; Transport, Communications, Shipping and Freight; Wholesale, Retail and other Commercial Services; Professional services.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ITTS	X	X	X	X	X	
MEA	X	X		X	X	X

Workers' associations

Title	Scope	Focus	Size	In short
GWU -- General Workers' Union www.gwu.org.mt	N	General	•	GWU consists of 8 sections such as: Technology, Electronics and Communication; Professional, Finance and Services (which includes Media).
UHM-Manufacturing, IT and Private Sector Section www.uhm.org.mt	N	General	over 26.000 members	Union HaddiemaMaghqudin (UHM) was established in 1966 under the name of Malta Government Clerical Union (MGCU).

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
GWU				X	X		X
UHM				X	X	X	X

Netherlands

The ICT sector in the country is esteemed to have a share of 4,6% of the national GVA and to employ about 240,000 workers, about 3% of the total employment³⁰.

A fifth of employees (20%) are union members in the Netherlands, and the proportion has been gradually falling in recent years. Anyway, the vast majority of employees (80%) are covered by collective bargaining, mostly at industry and company level. In ICT sector the industrial relations are developing constantly and vary greatly by company. There is a sector collective agreement, binding to companies that are members of the employers' association ICT. In addition, a few large IT enterprises have their own company agreements. Most other companies work with individual employment contracts.

Employers' associations

Title	Scope	Focus	Size	In short
FIAR CE www.fiar.nl	N	ICT+	about 28 member companies; 90% of the market	It is the only industry association for suppliers in the field of consumer electronics, manufacturers, importers and agents of the so called "browngoods" (audio- and visual equipment). FIAR CE represents the collective interests of its members in relation to government and politics, consumer, media and public opinion.
NEDERLAND ICT - ICT Employers' association www.nederlandict.nl	N	ICT	more than 550 members; over 250.000 employees.	Nederland ICT is the trade association for IT, telecom, internet and office companies in the Netherlands. Its mission is to provide the highest possible quality service and opportunities to its members in the ICT sector, and help them make the right decisions in delivering commercial solutions and achieving growth and profitability. Nederland ICT is active in the area of market promotion, advocacy and individual services, for example in the legal domain.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
FIAR CE	x	x		x	x	
NEDERLAND ICT	x	x		x	x	x

Workers' associations

Title	Scope	Focus	Size	In short
ABVAKABO www.abvakabofnv.nl	N	ICT+	350.000 members	Abvakabo FNV is the largest union in the public sector. It is committed to the interests of workers in different occupations, from hospitals to post offices, from university to public transport.
De Unie www.unie.nl	N	ICT+	-	The Union for industry and services with its branch on ICT for many years has been playing a leading role in the ICT sector at both collective and individual level.
Dienstenbond CNV www.cnvdienstenbond.nl	N	ICT+	-	The CNV Services Federation is the union for employees in the services sector. It looks after the interests of employees in wholesale and retail business, auctions, graphical and media business, banking and insurance companies, ICT and more.
FNV Bondgenoten www.fnvbondgenoten.nl	N	ICT+	-	FNV is the largest union in the private sector representing workers in the industry- including the relative new branch of ICT-, metal, transportation, agricultural, commercial or services. It is very active also in facing issues concerning ICT workforce.
FNV Zelfstandigen www.fnvzfp.nl	N	General	-	Self FNV is the association for freelancers and self-employed without employees.

³⁰ Data 2011, Eurostat.

Title	ICT	Post&Tel., TLC	Audio- visual media graphics	Electrical Electronics	Technology- based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank- Insurance- Finance; Business; Tourism; Culture)
ABVAKABO		x					x
De Unie	x			x	x		x
Dienstenbond CNV	x		x				x
FNV Bondgenoten	x						x
FNV Zelfstandigen							x

Poland

Polish IT sector is one of the most vital and robust industry within the national economy, characterised by a continuous positive trend in the last years above all in Business Software and Hardware. The ICT value amounts to almost 2% of the national GDP. The largest customer of Polish sectorial companies is still public administration. ICT growth is largely due to heavy foreign investment in the sector, around 70% of the largest IT companies in Poland being owned by foreign capital like Microsoft, HP, Google, Oracle, IBM or SAP.³¹

In Poland the participation in trade unions is relatively low at around 12% of employees and membership is divided between a large number of organisations. Only a minority of employees in Poland are covered by collective bargaining (30%), which takes place largely at company or workplace level. In ICT sector, the Postal & Telecommunication workers seem to be mainly represented.

Employers' associations

Title	Scope	Focus	Size	In short
KIGEIT National Chamber of Electronics and Telecommunications www.kigeit.org.pl	N	ICT	177 companies	The National Chamber of Commerce for Electronics and Telecommunications (KIGEIT), established in 1992, is a non-profit organization of the operators involved in the production, trade, services and scientific research work in the field of electronics and telecommunications, as well as in radio and television broadcasting services. It provides training, consultancy, information.
PIIT Polish Chamber of Information Technology and Telecommunications www.piit.org.pl	N	ICT	over 130 companies	Settled in 1993, its members are the operators of the business activity in the ICT sector - telecommunications and information technology.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
KIGEIT	x		x		x	
PIIT	x	x		x	x	

Workers' associations

Title	Scope	Focus	Size	In short
Sekretariat Łączności NSZZ Solidarność www.solidarnosc.org.pl/pl/sekcje/sekretariat-laczności.html	N	ICT	-	It is the Communication section representing Postal and Communication workers.
OPZZ All-Poland Alliance of Trade Unions www.opzz.org.pl	N	General	79 trade union organisations	OPZZ is a nationwide confederation of 79 nation-wide trade union organisations, grouped in 9 branches: Mine, Chemical and Energy; Metalworkers; Education and Science; Public Services; Food, Agriculture and Tourism; Building and Woodworkers; Textiles, Clothing and Leather; Transport; Commerce, Services, Culture and Art.

³¹Ministry of Treasury of Poland, <http://msp.gov.pl/en/polish-economy/economic-news/4426,ITICT-sector-in-Poland-its-good-and-its-going-to-get-even-better.html>

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology- based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank- Insurance- Finance; Business; Tourism; Culture)
NSZZ Solidarnosc		x					
OPZZ							x

Other organisations

Title	Scope	Focus	Size	In short
PTI Polish Information Processing Society www.pti.org.pl	N	ICT	over 1.700 individual members	The Polish Information Processing Society was established in 1981 as professional organization representing people who work in the IT. It fosters links between experts from industry, academia and business promoting education, knowledge sharing, codes of conduct and skills frameworks. It voices the Society's members opinions, needs, interests, and rights in relations with the general public, local and central government and with other associations in Poland and abroad.

Title	National business development	Internationa- lisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
PTI			x		x	

Portugal

Portugal has become a diversified and increasingly service-based economy since joining the European Community in 1986. Over the past decade, an ongoing privatisation process of many state-controlled firms led to liberalise key areas of the economy, including the financial and telecommunications sectors.³² SMEs are a quite important component of the national economy structure. Nowadays the labour force is employed in Services for over 60%, in Industry for around 30% and finally in Agriculture for less than 10%. Over the past years, Industry sector, especially manufacturing, has significantly changed moving to new sectors involving larger incorporation of technology: motor vehicles and components, electronics, pharmaceuticals and new technologies.³³

Portugal has traditionally had a high level of collective bargaining coverage, esteemed around 90% – partially through the extension of agreements by the government. Nevertheless union participation is rather low (19%), with a stronger presence in sectors such as Financial Services, Telecommunication and Trade Retail. Hardware manufacturing companies are mostly covered by electronic equipment industry agreements, while the larger telecommunication companies generally have their own agreement and ICT services are often covered by electrical, photographic and electronic commerce sectorial agreement.

Employers' associations

Title	Scope	Focus	Size	In short
AGEFE www.agefe.pt	N	ICT+	about 200 companies; 11.000 jobs	The AGEFE is the Business Association of Electric Utilities, Appliance, Electronic and Photographic. It is a nationwide business association, created in the late '60s. Associated companies are grouped into three divisions: Appliances; Electronics; Electrical Equipment (Wholesalers; Importers).
ANETIE www.anetie.pt	N	ICT	about 240 member companies	ANETIE is the National Association of Companies in Information Technology and Electronics. It seeks to uphold the interests of the business sector and promotes its sustainable growth.
CIP Business Confederation of Portugal www.cip.org.pt	N	General	71 sectorial/ regional associations; 27 companies; 7 Chambers of Commerce and Industry	CIP is a membership organization with corporate seat in the Economic and Social Council and in the Commission for Social Dialogue, which defends the primacy of the market economy, the focus on production of tradable goods and services, businesses and private initiative, and the dignifying of entrepreneurs and businessmen.
AIP Associação Industrial Portuguesa www.aip.pt	N	General	-	The Portuguese Industrial Association (AIP), founded in 1837 and based in Lisbon , is a nationwide business association, which operates as Chamber of Commerce and Industry. It develops activities for the associates in the fields of economic information, education and training, consulting, trade fairs and congresses, technology and information systems and represent their interests to governmental and foreign bodies.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
AGEFE	x		x	x	x	x
ANETIE	x	x	x		x	
CIP	x	x			x	
AIP Portuguesa	x	x	x		x	

³²www.portugal.com

³³Aicep Portugal Global - Trade & Investment Agency www.portugalglobal.pt

Workers' associations

Title	Scope	Focus	Size	In short
CPQTC www.conf-quadros.pt	N	General	•	It is a Portuguese Confederation of Technical and Scientific Staff and Managers. It aims to represent workers at the level of middle management, exercising their profession in the areas of production, scientific research, technology, administration, culture, health and social areas.
SINDETELCO www.sindetelco.pt	N	ICT+	-	SINDETELCO is the Democratic Union of Workers of Communications and Media. It addresses the Telecommunications, Post, Graphic & Media sectors.
SERS www.sers.pt	N	General	about 5000 members	It is the Union of Engineers. Its associates are spread amongst branches of business in more than 700 companies. It covers all professionals with degrees in engineering officially recognized.
SNTCT www.sntct.pt	N	ICT	-	SNTCT is the National Union of Workers of Posts and Telecommunications.
SINTTAV http://sinttav.org	N	ICT	Representing workers in over 200 companies	Settled in 2006, SINTTAV is the Telecommunications and audiovisual workers' union and today represents workers in more than two hundred companies.
SITese www.sitese.pt	N	General	-	SITese is the Commerce, hotels and services workers' union, founded in 1934.
STPT www.stpt.pt	N	ICT	-	STPT is the Union of workers of the Portugal Telecom Group

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
CPQTC					X		X
SINDETELCO		X	X				
SERS					X		X
SNTCT		X					
SINTTAV		X	X				
SITese							X
STPT		X					

Romania

The Romanian economy is characterised by Service for around 60% of national GDP, Industry for 32% and Agriculture for around 8%. ICT sector plays an important and growing role in the national economic upturn. The software industry and ICT services represent a particularly dynamic area.

The collective bargaining system has been fundamentally changed by legislation in 2011 when the Social Dialogue Act established the abolishment of the collective bargaining at national level and new rules for bargaining at industry and company level. As the result the position of unions weakened and the number of employees covered by collective bargaining fell sharply from 98% to around 36%. There are unions mainly in the Post & Telecommunication sector. On the other side, IT workers don't seem to be similarly represented.

Employers' associations

Title	Scope	Focus	Size	In short
ANIS Employers' Association of the Software and Services Industry www.anis.ro	N	ICT	over 100 companies	It is a non-governmental and non-profit organization representing software producers and related service providers in Romania. Established in 1998, ANIS took a strategic option to merge with ARIES – Romanian Association for the Software and Electronic Industry in 2007, in order to create the most representative national organization in the national IT field.
ARIES Romanian Association for the Software and Electronic Industry www.aries.ro	N	ICT+	over 250 companies	ARIES is the Romanian Association for Electronic and Software Industry. Considered the largest association of its kind in South-Eastern Europe, it is now an important source of information for the business community IT & C, mainly composed of SMEs and large enterprises. It fosters the growth of the sector through activities of innovation, partnerships, clustering, support services and transport technology.
ATIC - Association for Information Technology and Communication www.atic.org.ro	N	ICT	around 25 affiliates both national and international companies	ATIC is an independent non-governmental organization in the IT&C field in Romania, active since 1990. It represents ICT in both the business and the scientific sector, including the most important Romanian IT&C companies as full members as well as well-known professionals from universities and research field as individual members. ATIC organizes and promotes the information exchange, collaboration and cooperation between its members.
CNIPMMR www.cnipmmr.ro	N	General	•	CNIPMMR is the National Council of Private Small and Medium Enterprises in Romania. It focuses on developing a functional business environment, the promotion, defense and representation of interests of entrepreneurs and private companies in their relations with the organs of state power and administration, as well as relations with other organizations in the country and abroad.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ANIS	x	x	x	x	x	
ARIES	x	x	x		x	
ATIC	x	x	x		x	
CNIPMMR	x	x		x	x	

Workers' associations

Title	Scope	Focus	Size	In short
FSCOM - Trade Union Federation of Communication http://www.fscm.ro	N	ICT	•	FSCOM includes unions representing workers in Telecommunication and Video & Media sectors.
FSRT- Federatia Sindicatelor Din Romtelecom	N	ICT	-	It is the Federation of Unions of Romtelecom
FSTC - Trade Union Telecommunication	N	ICT	-	It is a trade Union of Telecommunication

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
FSCOM		x	x				
FSRT		x					
FSTC		x					

Slovakia

ICT in Slovakia has experienced a continuous growth with an increase of the sectorial employment around 170% over the past decade³⁴. In 2013 the Information and Communication sector recorded around 4% of the GDP, with a stronger contribution of telecommunication, software, Information services and finally audio-visual activities.³⁵

The participation in Unions is about 16 % of employees, a rather high rate within the Eastern Europe context. Collective bargaining covers around 35% of employees with a general downturn in the last years. Negotiations take place at both industry and company level. ICT workers look scarcely represented in unions but the Telecom sector which counts existing collective agreements.

Employers' associations

Title	Scope	Focus	Size	In short
ITAS www.itas.sk	N	ICT	about 85 member companies ; more than 85% of Slovak ICT market.	IT Association of Slovakia is leading professional association of domestic and foreign companies operating in the field of information and communication technologies since 1999. Main activities include: active contribute to the ICT development; participation in the drafting of legislation relating to ICT; promotion of Slovak IT industry in domestic and foreign markets; explaining the possibilities of ICT for public and private sector; defending the interests of info-communications industry.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ITAS	x	x	x	x	x	

Workers' associations

Title	Scope	Focus	Size	In short
OZT www.oztelemek.sk	N	ICT	•	It is the Trade Union Telekom, settled in 2010 as a split of the former Slovak Trade Union of Workers of Posts, Telecommunications and radio communications established in 1990 and afterwards divided into two parts: Trade Union Telekom and Trade Union Posts and Logistics.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
OZT		x					

³⁴ EU Skills Panorama Analytical Highlight, November 2012, <http://euskills Panorama.ec.europa.eu>

³⁵ Figures 2013, Statistical Office of the Slovak Republic, <http://portal.statistics.sk>.

Other organisations

Title	Scope	Focus	Size	In short
SSCS - Slovak Society for computer science	N	ICT	-	It is a civic association, based in Bratislava with the basic mission to create conditions for the development of informatics and information technology in the Slovak Republic. It brings together professionals working in the theory and practice of information processing. It collaborates with institutions dealing with theory, teaching and applications of informatics and information technology. It collaborates with similarly targeted institutions and companies abroad and represent Slovak Informatics in relevant international organizations.
SASAR - Slovak Association for Science and Applied Research	N	General	-	SASAR identifies a platform of entities oriented on supporting activities to improve conditions in the field of science, research and innovation in research centres, universities and business sector in Slovakia. The primary objectives of the association are: to enhance a constructive social debate; to implement activities aimed at promotion of primarily Slovak entities; to lead to scientific and technological progress as a prerequisite for building knowledge-based society in the context of sustainable growth.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
SSCS	x	x	x		x	
SASAR	x	x	x		x	

Slovenia

ICT in Slovenia has experienced a continuous growth with an increase of the sectorial employment over 170% in the past decade³⁶. The ICT sector in Slovenia employs today more than 20.000 people in some 2.600 companies.

The proportion of employees in trade unions is relatively high in Slovenia, between 25% and 30%. The union structure is rather fragmented. Collective agreements cover almost all employees (90%) thanks to the fact that in the past all employers had to belong to chambers of commerce and industry. Nevertheless ICT is not generally represented with rare exceptions in the telecom sector and at company level.

Employers' associations

Title	Scope	Focus	Size	In short
ZIT Association of Information Technology and Telecommunications http://zitex.gzs.si/slo/	N	ICT	-	ZIT is one of the 26 trade associations operating in the Slovenian Chamber of Commerce. It represents large, medium and small enterprises in the field of ICT, working in the business of computer science and informatics as well as in telecommunication such as Internet Service Providers. Some of its main activities are: increase investment in ICT in the business and the public administration (i.e. e-government and information society services); connect countries and ICT companies.
OZS Chamber of Craft and Small Business of Slovenia www.ozs.si	N	General	Around 52.000 members	The Chamber of Craft and Small Business of Slovenia is a nation-wide umbrella organisation. It is structured in thirty industry sectors among which Paper Graphic Business, Printing and Electronics.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ZIT	x	x	x	x	x	
OZS	x	x		x	x	

Workers' associations

Title	Scope	Focus	Size	In short
TS Telekom Slovenije www.telekom.si/	N	ICT	-	It is the Telekom Slovenia trade union.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
TS Telekom Slovenije		X					

³⁶ EU Skills Panorama Analytical Highlight, November 2012, <http://euskills Panorama.ec.europa.eu>

Spain

Despite of crisis, ICT economy in Spain has kept an overall positive trend with a share of about 7% of GDP³⁷. The country has invested on the development of the sector, especially in application fields such as e-government, e-health and Services. The leading ICT international companies are located in Spain as well, although national SMEs are an important component of the economic system. Over the past decade, employment has also seen a continuous growth of about 120%.

The overall level of coverage is high at around 70% of the total workforce with negotiations taking place mainly at industry level, although company level has lately increased importance thanks to new legislation. The participation in the unions is around 20% of the workforce. In the ICT sector, the two dominant confederations, CC.OO and UGT, have internally developed two main branches, specifically focused on one side on TLC and, on the other one, on ICT. There is no sectoral agreement in ICT except for telemarketing. Hardware manufacturing, software and Services companies are generally covered by a variety of other industry agreement such as metalworking and Offices. Company agreements are recorded in large telecommunication firms.

Employers' associations

Title	Scope	Focus	Size	In short
AMETIC www.ametic.es	N	ICT+	over 5.000 companies; 386.000 employees; about 7% of GDP.	Established in 2010, AMETIC is a new Spanish employers' association promoting and fostering the sectors of electronics, information technology, telecommunications and digital content. It consists of 5 sectoral areas: Consumer electronics; Electronics Industry; Information Technology; Operators; Digital Content and Services.
PIMEB Confederació de la Petita i Mitjana Empresa de Balears www.pimeb.net	L	General	Over 150 companies	PIMEB is the most representative business organisation in the Balearic Islands. It is composed by three insular federations, one from Majorca (PIMEM), one from Minorca (PIME Menorca) and one from Ibiza and Formentera (PIMEEF).
CEPYME Spanish Confederation of Small and Medium Enterprises www.cepyme.es	N	General	113 regional/national org.; over 3.000 companies; 99% of SMEs.	CEPYME is a national professional and inter-confederal organization to defend, represent and promote the interests of small and medium enterprises and the self-employed entrepreneurs. It has the focus on the needs of information, advice, technical assistance, research and development of organizations, companies and affiliate entrepreneurs.
CONETIC www.conetic.info	N	ICT+	13 associations; over 1.700 companies	CONETIC is the Spanish Confederation of Business Information Technology, Communications and Electronics, created in 2005 as a non-profit entity.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
AMETIC	x	x	x		x	
PIMEB	x	x		x	x	x
CEPYME	x	x			x	
CONETIC	x	x	x			

³⁷ Figures 2011, CONETIC Statistical Survey, INFORME DEL ESTUDIO RETRIBUTIVO DEL SECTOR TIC ESPAÑOL DICIEMBRE 2012, www.conetic.info

Workers' associations

Title	Scope	Focus	Size	In short
CCOO Telecommunications Sector www.fsc.ccoo.es/webfsct/elecomunicaciones/	N	ICT	over 14.000 members	It is the sectoral organization of the Federation of Citizen Services CCOO, made by all workers in the operators of wireline, wireless and auxiliary enterprises. It mainly represent the Telecom companies.
COMFIA CC.OO www.comfia.net	N	ICT+	-	Comfia (acronym for financial and administrative fees) is the Federation of Financial and Administrative Services CC.OO, born from the merger of FEBA (Federation of Bank and Savings) and FES (Federation of Insurance), which later joined administrative services, telemarketing and call centers, engineering, computer planning and information technology services.
ELA STV www.ela-sindikatua.org	L	General	over 100.000 workers Country	ELA - Basque Workers Solidarity is the Basque trade union representing the largest number of workers from the southern Basque. Its framework includes 4 Federations: Metal; Public Services; Private services; non-metallurgy industry, construction, transport.
FES-UGT www.fesugt.es	N	ICT+	-	It is the Federation Services General Workers Union (FeS-UGT) and includes different sectors such as: Financial Sector; Communication, Culture and Graphic Arts; Cleaning and Services to the Company; Private Security and Ancillary Services; Insurance and Offices. It's the branch that organizes the ICT sector.
TCM-UGT www.tcmugt.es	N	ICT+	-	TCM is the Transport and Communication workers' federation. Its sectors are: Air; Road and Urban; Communications; Rail and Tourist Services; Sea; Ports, Custom and Consignee. It is the branch that organizes Telecom.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
CCOO TLC Sector		X					
COMFIA CC.OO	X						X
ELA STV							X
FES-UGT	X		X				X
TCM-UGT		X					X

Sweden

IT sector in Sweden plays an important role in the growth of the national economy and IT industry has increased by around 16% since 2008 up to 2012. The sector accounted in 2012 for 4.1% of total employment in Sweden, with around 183.000 workers. Software and IT Services are the major contributor of the Swedish IT industry and sales, with the 83% of firms focused on this subsector. The Swedish economy is dominated by SMEs and 89% of all enterprises working in IT has less than 10 people.³⁸

The proportion of employees in unions is rather high (over 70%) and most of workers are covered by a collective agreement (90%), which are mainly negotiated at industry level even if the system leaves a high margin of negotiation at company level too. ICT sector is only partially covered by specific agreements, mostly concerning telecommunication. On the whole larger companies are generally covered by a wide range of other industry agreements, otherwise some of the larger ICT ones have their own company agreements.

Employers' associations

Title	Scope	Focus	Size	In short
Confederation of Swedish Enterprise www.svensktnaringslivet.se	N	General	about 50 organisations; 60.000 companies; over 1.6 million employees	It is Sweden's largest, most representative and most influential business federation. It was founded in 2001 through the merger between the Swedish Employers' Confederation (SAF) and the Federation of Swedish Industry (SI). It is structured in 21 regional offices providing proximity and contact with decision makers and media around the entire country. It has one office in Brussels, to create contacts and put forward the views of Swedish enterprise in the EU Commission and EU Parliament.
Swedish IT & Telecom Industries www.itotelekomforet.agen.se	N	ICT	about 1.000 member companies; nearly 101.000 employees	Swedish IT and Telecom Industries is a member organization for companies of all sizes within the entire IT and telecom sector, that wish to join the largest industry network in Sweden in order to promote and further develop the IT market and conditions for IT enterprises. Swedish IT and Telecom Industries is one of seven branch and employer associations that work together as Almega. Basic membership offers companies advice on sector issues and the opportunity to access collective agreements and employer support.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
Confederation of Swedish Enterprise	X	X			X	
Swedish IT & Telecom Industries	X	X	X	X	X	X

³⁸ Figures 2012, www.itstatistik.se

Workers' associations

Title	Scope	Focus	Size	In short
CivilekonomernaRiksförbund www.civilekonomerna.se	N	General	about 40.000 members, of which 12.000 students	The Swedish Association of Graduates in Business Administration and Economics
JUSEK www.jusek.se	N	General		It is a Swedish Union of University Graduates of Law, Business Administration and Economics, Computer and Systems Science, Personnel Management and Social Science.
IFMetall the Swedish engineering workers union www.ifmetall.se	N	General	about 355.000 members; 12.100 jobs	It represents workers in the Industry such as Chemical, Ironworks, Engineering, Machinery; Electronics; Transportation; Chemical; Pharmaceutical; Textile; Textile and oil refinery; etc. Its main purposes are: active industrial policy; Sustainable work; security at workplace; mutual support.
Ledarna – The Swedish Organization for Managers www.ledarna.se	N	General		Ledarna is the union of managers in the different business function such as CEO, CIO and Personnel chief. It is the first organization in Sweden that was formed by managers for managers since 1905. It has a dual perspective and supports leaders both as manager and as an employee. It is organised in 23 Industry associations among which: Trade; Energy&Technology; Media Graphic.
SEKO - Facket för Service och Kommunikation www.seko.se	N	ICT+	121,000 members	SEKO is a trade union organizing service and communication employees in nine industries: Civil; Energy; Defense; Post; Seafarers; Telecommunications; Traffic; Health; Road & ban.
SI - The Swedish Association of Graduate Engineers Unionen www.sverigesingenjorer.se	N	General	137.000 members	It is the country's largest network for graduate engineers
Unionen www.unionen.se	N	General	over 500.000 members	The Union is the largest union in the private sector and the country's largest white-collar representative of more than 65 000 jobs.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
CivilekonomernaRiksförbund							x
JUSEK							x
IFMetall				x			
Ledarna			x		x		x
SEKO		x					
SI				x	x		x
Unionen							x

United Kingdom

ICT industry, with a major contribution of software and IT services, represents an important sector in the national economy. The UK ICT market accounts for around 8% of GVA and 1,3 million employed in the sector³⁹ Small businesses employ more than half of all private sector workers and contribute 50% of UK GDP⁴⁰, being actually an important contributor in the ICT sector as well.

Union density is around 25% with a much higher rate in the public sector than in the private one. Less than a third (29%) of all employees in the UK are covered by collective bargaining, which is mainly played at company or workplace level. In the ICT sector collective bargaining is rather scarce. There are some company agreements mostly in hardware manufacturing or bargaining at even lower level in some larger service /software firms.

Employers' associations

Title	Scope	Focus	Size	In short
FSB Federation of Small Businesses www.fsb.org.uk	N	General	200.000 members	It is the UK's largest campaigning pressure group promoting and protecting the interests of the self-employed and owners of small firms. Formed in 1974, it now has members across 33 regions and 194 branches. Being SMEs an important presence in the UK economy, FSB aims at representing them in Westminster, Whitehall and Brussels as well as councils across the UK, giving them voice mainly through Press and Media communication campaigns.
Intellect www.intellectuk.org	N	ICT+	over 850 companies from SMEs to multinationals	It is the leading trade association representing the UK technology industry. It associates many hundreds of smaller technology companies and acts as the hub for this community. It organises as many programmes as member working groups on hot topics such as: Big Data and Information Management; Cloud and IT as a Service; Growth and Tech; Innovation; IT Hardware Regulation and Compliance; Satellite and space services; Skills and Human Capital.
UKITA United Kingdom IT Association www.ukita.co.uk	N	ICT	about 134 member companies	The UK IT Association (UKITA) was established as the private sector organisation responsible for the development of a credible and thriving IT industry across the United Kingdom. The primary focus is to encourage the growth of SMEs through the delivery of business opportunities, tenders and projects and by promoting the members businesses. It also provides services around marketing for IT and digital businesses of all sizes.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
FSB	x				x	
Intellect	x		x		x	
UKITA	x		x	x	x	

³⁹ ONS data 2011.

⁴⁰ Figures 2013, <http://www.fsb.org.uk/stats>

Workers' associations

Title	Scope	Focus	Size	In short
CWU - Communications Workers' Union www.cwu.org	N	ICT	204.000 members	CWU is the biggest union for the communications industry in the UK. CWU members work in Royal Mail, the Post Office, BT, O2 and other telecommunication companies, cable TV, Accenture HR Services, financial services, and the Alliance & Leicester (now Santander). The members' expertise includes engineering, computing, clerical, mechanical, driving, retail, financial and manual skills.
GMB www.gmb.org.uk	N	General	619.000 members	GMB is a general union working in every part of the economy.
PCS Public and Commercial Services Union www.pcs.org.uk	N	ICT+	270.000 members	One of the largest trade unions in the UK, PCS represents employee working in a huge variety of roles including: Air traffic control; Benefits and welfare advice; Border and immigration; Coastguards; Courts service; information technology; Police support; Royal Palaces; Security; State pensions; taxation.
Prospect www.connectuk.org www.prospect.org.uk	N	ICT	over 16.000 IT and TLC workers	It is a campaigning trade union representing managers and professionals in the communications industry which merged into <i>prospect</i> , the British Trade union representing engineers, managers, scientists and other specialists in both the public and private sectors.
UNITE THE UNION www.unitetheunion.org	N	ICT+		The union includes 24 sectors among which there are: Graphical, Paper&Media; Electrical Engineering and Electronics; IT&Communication; Services and General Industries.
USDAW - Union of Shop, Distributive and Allied Workers www.usdaw.org.uk	N	General	over 432.000 members	Usdaw members work in a variety of occupations and industries including: shopworkers, factory and warehouse workers, drivers, call centres, clerical workers, milkround and dairy process, butchers and meat packers, catering, laundries, chemical processing, home shopping and pharmaceutical.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
CWU	x	x					x
GMB				x	x		x
PCS	x						x
Prospect	x	x					
UNITE	x		x	x		x	x
USDAW					x		x

Countries not included in the Europe membership

The study has included some more countries which don't belong to the European Union. Norway and Switzerland complete the study in the Baltic area and in the Centre Europe. Albania, Kosovo and Serbia have been included as representative of Balkan area, currently in status of Candidate or Potential Candidate countries of the European Union. Turkey represents a growing IT economy at the Easter border which also advocates to become an European member.

Albania

Albanian economy accounts for a GDP growth of 3% with an estimated share of IT market equal to 1,5% of GDP and a growth rate of 1,6%.⁴¹ In IT sector, there are about 1.600 registered companies, even if it is estimated that only a minority of them are actively involved in the field of IT at a significant level. Most of them are very small enterprises. In addition, it is esteemed there is a lively informal sector operating in this field, mainly in the web development, services and maintenance.

Employers' associations

Title	Scope	Focus	Size	In short
AITA www.aita-al.org	N	ICT	61 members	The Albanian Information and Communication Technology Association was established in 2007 as an initiative of Albanian IT enterprises. It coordinates representation towards the Government, promotes cross-sectoral and international cooperation.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
AITA	x	x	x		x	

Workers' associations

Title	Scope	Focus	Size	In short
Trade Unions Federation of Transport and Telecommunication Workers of Albania http://kssh.org/en/	N	ICT+	•	It is devoted to social dialogue, in the sector of Transport, Post and Telecommunication such as Telephone services and mobile telephony.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
Trade Unions Federation of Transport and Telecommunication Workers of Albania		x					

⁴¹Figures 2011. Source: GENERAL OVERVIEW OF INFORMATION TECHNOLOGY COMPANIES IN ALBANIA, AITA Publications, September 2012. www.aita-al.org

Kosovo

Kosovo experienced in relatively few years a profound transformation due to the transition from a centralised into an open market economy and a process of privatization. Information and communication has a major contribution in Bank and Financial intermediation. Most of ICT companies are concentrated on vendor hardware and software (23%) and software development and programming (22%)⁴². Kosovo records an high rate of unemployment. The active workforce is esteemed to be employed 14,6% in agriculture, 20.7% in industry and construction, 64.8% in services such as administration and education⁴³.

The participation in the unions is esteemed about 90% but it matters only the public sector where all the workers are likely covered by a collective agreements. On the whole, collective bargaining is quite scarce, primarily negotiated at national level, with few initiatives at company or organisation level.

Employers' associations

Title	Scope	Focus	Size	In short
STIKK - Kosovo Association of Information and Communication Technology http://216.67.253.142/		ICT	-	The Kosovo Association of Information and Communication Technology (STIKK) plays a central role in stimulating dynamic growth of the ICT sector across Kosovo by opening up new opportunities and increasing the overall competitiveness of the sector.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
STIKK	X	X	X		X	

Workers' associations

Title	Scope	Focus	Size	In short
BSPK www.bspk.org	N	General	11 unions	It is the union of independent Trade Unions of Kosovo.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
BSPK							X

⁴²Source: STIKK Publications About ICT Market

⁴³Eurostat 2011

Norway

Norwegian Information and Communication sector accounts for a growth of 2,3% from 2013, around 15.000 companies and a coherent growing trend of employment which counts around 89.000 people. The sector is dominated by IT service, including computer programming, consultancy and related activities, with an annual growth rate of 4%. Secondly, there is the telecommunication industry and finally media publishing and audio visual.⁴⁴

More than half Norway's employees are in unions and about 70% of the workforce is covered by collective agreements. Norwegian bargaining at national level provides much of the industrial relations framework which is then detailed through annual negotiations at both industry and company/organisation level. Telecommunication companies generally have company agreements. Hardware manufacturing firms are generally covered by engineering agreements. Software and Service company refer to a few specific sectoral agreements, especially for data and office equipment , electronic media and information processing.

Employers' associations

Title	Scope	Focus	Size	In short
ABELIA Business Association of Norwegian knowledge- and technology based enterprises http://abelia.no	N	ICT	over 1.100 members	Founded in 2001 as Norway's first employers' association for the information and communications technology (ICT) sector, ABELIA is a trade and employers association associated with Norway largest employers' organisation (NHO Confederation of Norwegian Business and Industry). Abelia is dedicated to improve the business environment for its member companies in the knowledge- and technology based sector, and to promote the industry's contribution to economic growth and social progress. By influencing policy, Abelia improves business opportunities for members and supports initiatives that stimulate demand for members' products and services.
IKT Norge www.ikt-norge.no	N	ICT	over 350 members	IKT Norge is the trade organisation for the Norwegian ICT industry. It works to increase the market for ICT products and services and to enhance the credibility of the ICT sector. It also promotes the use of ICT throughout Norwegian society and encourages its member companies to participate in R&D projects.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ABELIA	X	X	X	X	X	
IKT Norge	X	X	X		X	

Workers' associations

Title	Scope	Focus	Size	In short
EL&IT Forbundet - electricians and IT workers union www.elogit.no	N	ICT+	about 37.000 members	Established in 1999 as a merge of former Norwegian Electrical and Power Station Association and the Telecommunications and Data Association, it is a nationwide organisation of workers in these sectors: Telecommunications (engineering, installation and service); Electrical engineering (installation, services, maintenance); Energy (production, distribution, maintenance); IT (Software/hardware, system operators, maintenance).

⁴⁴Figures 2013, Source: Statistics Norway, www.ssb.no

FLT - Norwegian Engineers and Managers Association www.lo.no/u/Om-LO/Organisasjonen-LO1/Forbundene/Forbundet-for-Ledelse-og-Teknikk-FLT/	N	General		Its members are mainly employed in the private knowledge and technology companies, industry and services.
HK - Handel og Kontor i Norge http://www.lo.no/u/Om-LO/Organisasjonen-LO1/Forbundene/Handel-og-Kontor-i-Norge-HK/	N	General		It is dedicated to Commerce and Offices and organises workers in trade, service and management in the private sector.
NEGOTIA www.ys.no	N	ICT+	21.500 members	It organizes employees in all types of private businesses working in office administration, information technology, sales, service, accounting, inventory and labor management, technical staff.
NITO - The Norwegian Society of Engineers www.nito.no	N	General	about 72.000 members	It is the largest union for engineers and technologists in Norway.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
EL&IT	x	x		x	x		
FLT					x		x
HK							x
NEGOTIA	x						x
NITO					x		x

Serbia

ICT sector represents around 6% of Serbian GDP within an economic context of recovery from stagnation and still lasting weakness. As a measure for reducing the negative impact of the current economic crisis, the Government has increased the actions for foreign interested companies to set-up their businesses in the country. Anyway, business in the IT sector is not so much regulated as it is in the telecommunication and, on the whole, the sector suffers from various consequent difficulties. More than half of the Serbian IT market is made up of IT hardware whose contribution continued to decrease in the last years, while the Software and Service still accounts for a slightly positive trend. The IT Serbian industry is characterised by a huge number of micro, small-medium enterprises and very few larger ones with international owners. The overall employment in IT and Telecommunication is esteemed less than 3% of the total workforce, but with an increasing trend.⁴⁵

Employers' associations

Title	Scope	Focus	Size	In short
Belgrade Chamber of Commerce IT Association www.kombeg.org.rs	N	ICT	-	Association of Information Technologies Belgrade Chamber of Commerce is an association of businesses and organizations in the field of information and communication technologies (ICT). Its three groups for hardware, software and e-commerce, gather all Serbian IT companies.
SAE Serbian Association of Employers (UPS) www.poslodavci.rs	N	General	-	SAE gathers companies of various forms and sizes in order to articulate their common goals and interest and attain most favorable position for them in relation to the Government and trade unions within the field of social policy.
Vojvodina ICT Cluster http://vojvodinaictcluster.org	N	ICT	27 associates; over 1.500 jobs	Founded through a bottom-up initiative in 2010, Vojvodina ICT Cluster serves as a platform for cooperation and provides a portfolio of services to the ICT companies in Serbia.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
Belgrade Chamber of Commerce IT Association	x	x	x		x	
SAE	x			x	x	x
Vojvodina ICT Cluster	x	x	x		x	

Workers' associations

Title	Scope	Focus	Size	In short
Trade Union of Transport and Communications "Independence" www.nezavisnost.org	N	ICT+	200.000 members	It gathers unions grouped in 18 branches among which Building, Energy Health&Welfare, Tourism, Sports, Media and Culture. The 9th branch is devoted to Transport and Telecommunication.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance;)
"Independence"		x	x		x		x

⁴⁵ Figures 2011 Source: *ICT in Serbia at a glance*, VOICT, ICT Net, NiCAT in cooperation with Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, January 2013.

Switzerland

The Swiss ICT sector is the fifth largest industry in the country with a share of around 5,1% of GVA and a continuous growth in the past years. Even in the recession year 2009 with an overall decline in the Swiss economy's output, ICT sector was slightly positive. Swiss ICT is a cross-cutting function for all industries, as well as for the public administration. Just around a third of ICT employees operates in the ICT sector itself. More than two-thirds of the total 177.000 ICT workers are in other sectors such as banks, insurance and companies in the wholesale, retail trade, administration or industry.⁴⁶

The participation in unions is about 21% and around the half of workers – with a growing trend- are covered by collective agreements. The dominant level of bargaining is the sector one, although there are numerous collective agreements with individual firms besides the major sectorial agreements. A few ICT collective agreements are active for Post and Telecommunication companies (i.e. Swisscom) and for Call Centre operators.

Employers' associations

Title	Scope	Focus	Size	In short
ICTswitzerland http://ictswitzerland.ch	N	ICT	22 associations, 20 business companies	ICTswitzerland is the umbrella organization of associations and providers and corporate users of ICT. It is the collective voice to the public, the authorities and other organizations and forms the platform for synergistic activities and common interests. ICTswitzerland aims at the promotion and development of ICT and the professionals working in organizations and in Switzerland.
SIMSA Swiss Internet Industry Association www.simsa.ch	N	ICT	159 members	SIMSA gathers companies and individuals who work within the digital business world: Content & Services (media, advertisers, consultants); Systems (web agencies, Software manufacturers); Infrastructure providers (ISPs and hosting providers, network, cloud provider). Its objective is to strengthen the added value of ICT services and software companies on Switzerland location and promote the development, dissemination and use of computer science based content and processes of new media and Internet.
SWICO www.swico.ch	N	ICT	over 400 members; 36.000 people	Swico is the association of ICT suppliers and other related industries in Switzerland, founded in 1940. It sits as a business association for its members' interests in politics, economy and society, and also offers them a wide range of business services. Through its Interest Groups, SWICO members debate and face significant issues on ICT sectors. Two groups of them are dedicated to "Software, Consulting, Services" and "Technology" with a participation of about 300 members.
Swiss ICT www.swissict.ch	N	ICT	3.000 members (ICT providers, User companies, Professionals)	SwissICT, established in 2000 by the merger of two organizations - Swiss Association of Data Processing (SVD) and computer science-industry trade association (WIF), is now the primary representative of the ICT business in Switzerland. Among its main activities: to promote the image of the Swiss ICT; to commit good political and economic conditions; to promote the professional know-how; to bundle needs; to publish report and data researches on ICT sector; to award the "Swiss ICT Award" , the "Oscars of the Swiss computer science".
SwissMedia – Swiss IT & Multimedia Association www.swissmedia.ch	N	ICT		SwissMedia Association was founded in 1995 by 34 private and public organizations, engaged in the electronic media, information technology, communications and multimedia. SwissMedia offers a range of information, support and services to entrepreneurs, SMEs in their start up and development.

⁴⁶Figures 2011, <http://ictswitzerland.ch/themen/wirtschaftskraft/>

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
ICTswitzerland	x		x		x	
SIMSA Swiss Internet Industry Association	x		x	x	x	x
SWICO	x	x	x		x	
Swiss ICT	x		x	x	x	
SwissMedia – Swiss IT & Multimedia Association	x	x			x	

Workers' associations

Title	Scope	Focus	Size	In short
UNIA www.unia.ch	N	General	over 200.000 members	The union represents 4 main sectors: Building; Craftsmanship; Industry (Metal-mechanics; Electronics; Pharmaceutical; Paper); Tertiary and Services.
SYNDICOM www.syndicom.ch	N	ICT+	about 43.000 members	It is the Union of Media and Communication and includes sectors such as: Posts; Couriers; Transport&Infrastructures; ICT; Telecommunication; Facilities; Call centres; Security; Press and Multimedia Publishing.
TransFair www.transfair.ch	N	ICT+	approx.13.000 members	TransFair is the staff association for those working in the sectors of Postal / Logistics , Communication , Public Transport , Public Administration. In the Communication industry TransFair is social partner of Swisscom and its subsidiaries.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
UNIA				x	x	x	x
SYNDICOM	x	x				x	x
TransFair		x					x

Turkey

The Turkish ICT sector is one of the key sectors in Turkey with an estimated growth of 8-10% for 2012, despite the economic global crisis. The Turkish IT services market is expected to grow at even 14% over 2012-2016.⁴⁷ It is estimated that Turkey represents 2% of the European ICT.⁴⁸

Regarding statistics on industrial relations in Turkey data and sources are rather uncertain. The union density is estimated around 8-10% in 2013 with a high rate of informal employment that makes statistics even more difficult.⁴⁹

Employers' associations

Title	Scope	Focus	Size	In short
TESİD www.tesid.org.tr	N	ICT+	160 members	TESİD, established in 1989, represents members belonging to 70 different industrial establishments in electronics industry, information technologies and services. Its goal is to strengthen technological innovation and to promote the business, taking into account the views from scientists to decision-making authority.
TUBISAD www.tubisad.org.tr	N	ICT	Over 200 companies representing annual turnover of 40 billion USD	TUBISAD represents companies operating in Information and Communications Technology (ICT) and New Media sectors. The primary mission of TUBISAD is to foster ICT in becoming the fundamental sector contributing to Turkey's economic growth and to promote collective interests of the member companies.

Title	National business development	Internationalisation	ICT and digital culture promotion	Legal information service	Dialogue with institutions	Collective agreement
TESİD	X	X	X		X	
TUBISAD	X	X	X		X	

Workers' associations

Title	Scope	Focus	Size	In short
TÜRKİYE HABER-IS www.haberis.org.tr	N	ICT	•	It is the union for Postal, Telegraph, Telephone, Radio and Television Workers
MEDYA – IS www.medya.is.org	N	ICT	-	It is the Media Workers' Union.

Title	ICT	Post&Tel., TLC	Audio-visual media graphics	Electrical Electronics	Technology-based sectors (i.e. Research labs; Energy; Health)	Print. Publishing Advertising	Services (i.e. Bank-Insurance-Finance; Business; Tourism; Culture)
TÜRKİYE HABER-IS		X					
MEDYA - IS	X		X			X	

⁴⁷ ICT MARKET IN TURKEY 2012, US Commercial Service.

⁴⁸YASED, Information and Communication Technologies on the Road to 2023 , September 20112, Deloitte, http://www.yased.org.tr/webportal/English/Yayinlar/Documents/yased_2023_ict_on_the_road_to_2023_targets.pdf

⁴⁹ <http://industrialrelationsinturkey.com/statistics-on-turkish-industrial-relations>

European organisations

The mapping study has highlighted a few workers' and employers' organizations which are mostly representative of Union Federations and Business associations across the European countries. They have been here reported as **General**, when they are cross-sectoral bodies; **ICT**, when they are specifically focused on the Information and Communication Technology sector; **TLC**, when they primarily represent the actors in the Telecommunication sector.

The following table shows the European organisations mapped as **General** by the study.

Organisation	Overview
BASTUN www.bastun.eu	<p>BASTUN is the Baltic Sea Trade Union Network and works as a forum where the trade unions of the Baltic Sea Region exchange information and discuss and define common interests. The network aims at political and social influencing, coordinates joint projects and raises issues related to the Region within the international trade union family. BASTUN is a strategic partner of the Council of Baltic Sea States (CBSS) and cooperates closely with the Baltic Sea Parliamentary Conference (BSPC).</p>
BUSINESSEUROPE www.business-europe.eu	<p>It represents 41 central industrial and employers' federations from 35 countries, working together to achieve growth and competitiveness in Europe for both small, medium and large companies. Its mandate is to actively promote member interests by informing and influencing EU policy makers. It operates in four main areas: encouraging entrepreneurship; creating space for business; improving labor market flexibility; promoting a balanced sustainable development policy.</p>
CEA - PME Confederation Europeenne des Associations de Petites et Moyennes Entreprises www.cea-pme.org	<p>CEA-PME is a confederation of national business organisations. It represents the interests of small and medium-sized enterprises of all branches and professional groups towards the European institutions. It represents its members towards the institutions of the European Union and supplies for services in the field of public procurement, international networking and market access, legal support, public relations and cultural events such as events and seminars.</p>
CEEMET www.ceemet.org	<p>CEEMET is the European employers' organisation representing the interests of the metal, engineering and technology-based industries with a particular focus on social policy and industrial relations issues. The members are national employers' organisations and federations, representing 200.000 member companies across Europe, the vast majority of which are SMEs, covering different sectors such as TLC, ICT, Pharma, Automotive, Shipbuilding, Chemical, Energy. CEEMET is a recognised consultation body and discussion partner of the European Institutions, BusinessEurope, fellow associations from the MET and related industry sectors (ACEA, ASD, CESA, CLEPA, ECEG, EUROFER, FIEC, ORGALIME), European-level trade unions (EMF-FEM) and the International Labour Organisation (ILO) and International Organisation of Employers (IOE).</p>
IndustriALL European Trade Union www.industrial-europe.eu	<p>It is a European trade union federation founded in 2012. It represents different sectors such as Telecommunication, ICT, Pharma, Mechanical Engineering; Automotive; Aerospace; Shipbuilding; Chemical; Energy.</p>
UEAPME European Association of craft, Small and Medium-sized enterprises www.ueapme.com	<p>UEAPME is the employers' organisation representing the interests of European crafts, trades and SMEs at EU level. UEAPME is a recognised European Social Partner and acts on behalf of crafts and SMEs in the European Social Dialogue and in discussions with the EU institutions. Its sectoral policies are explicitly addressed to sector such as: Construction; Cosmetics; Food; Meditech; Retail; Tourism; Transport.</p>

The following table shows the European organisations mapped as **ICT focused** by the study.

Organisation	Overview
CEEEOA - Central and Eastern European Outsourcing Association http://ceeo.org/	CEEEOA brings together the IT outsourcing provider associations of the Central and Eastern European region that includes countries such as Hungary, Bulgaria, Romania, Poland, Lithuania, Slovenia, Ukraine. It strives to act as an effective resource of industry knowledge, effective promotional tool and effective communication channel for the associates to become a competitive alternative to other global IT and business outsourcing providers. It supports the increase of regional and international competitiveness through networking and international expansion of CEE IT service providers.
DIGITALEUROPE www.digitaleurope.org	DIGITALEUROPE is the Brussels-based trade association representing the digital technology industry in Europe. Its members include some of the world's largest IT, telecoms and consumer electronics companies and national associations from every part of Europe.
EAI - European Alliance for Innovation http://eai.eu	EAI is a community-driven organisation, created by leaders from industry, research, and policy making organisations to engage the global community with the shared goal of securing Europe's future competitiveness through innovation. By harnessing the potential of the ICT revolution, EAI engages the global community in all sectors of society to explore ways in which innovation in technology and business can benefit society at large. The key activities are addressed to 6 segments of interest: education and professional enhancement; dissemination and personal recognition; research and technology transfer; policy and regulation; funding and business development; market trends and society.
PIN-SME www.pin-sme.eu	The Pan European ICT & eBusiness Network for SMEs is the first European association exclusively focused on representing the interests of the SME community in the ICT sector.
UNI ICTS Information and Communication Technology Services www.uniglobalunion.org/sectors/icts	UNI ICTS is the representative part of Global Union for the information, communication, technology and services industry.

The following table shows the European organisations mapped as **TLC focused** by the study.

Organisation	Overview
ECTA European Competitive Telecommunication Association www.ectaportal.com	Founded in 1998, ECTA is a European non-profit trade association which promotes a regulatory environment for the European Communications Sector in order to support free market competition, investment, innovation in European ICT sector and lead to political, social and economic benefits for all Europe's businesses and consumers. ECTA represents the telecommunications industry to key government and regulatory bodies.
ESOA www.esoa.net/	ESOA is a non-profit European organisation established to be the reference point for the European satellite operators industry. Today it represents the interests of 10 satellite operators who deliver information communication services across the globe. It potentially includes companies or organisations who are not themselves operators but who engage in satellite-related activities as well.
ETNO www.etno.be	ETNO is the voice of Europe's Telecommunication network operators and is the principal policy group for European Electronic Communication network operators.
EURO ISPA www.euroispa.org	EuroISPA is a pan European association of European Internet Services Providers Associations (ISPAs).

Conclusions

The objective of this study was to select the relevant employers and workers associations in each EU country, potentially interested in joining a future European social dialogue platform in the ICT.

The study started from scratch as there are no previous structured works on this topic in the ICT sector. Accordingly, this outcome is to be seen as a starting point, that's an initial, basic framework collecting sectorial information about the ICT business and the players, to be further developed, enriched and even updated over time.

Taken for granted that this study is only an initial input for further investigation rather than a full achievement, and the analysis is not exhaustive, some remarks can be made nonetheless, to foster social dialogue at European level.

The collective bargaining as an usual and common basis for social dialogue

In the ICT sector, the situation is quite varied and fragmented across European countries. However, we can cluster the ICT contract regulation as follows:

- Countries who have no sectorial collective agreement in the ICT, such as Italy, Spain, Germany, Portugal or Malta;
- Countries who have a sectorial collective agreement at national level, such as Austria, France or Finland;
- Countries who have collective agreements in the ICT defined at industry level or even at company level only, e.g. Estonia, Hungary, the UK, Lithuania, Luxembourg, the Netherlands, Slovenia, Sweden, Bulgaria, Slovakia, and may others.

On the whole, ICT sectorial collective bargaining regulated nationwide is not easy to find in the European countries, apart from some few ones that have already been mentioned above.

An interpretation of this situation might be that the emerging branch of Information Technology and the so called Industry related Services, made of new firms and spin-offs of HW and SW production and service, are afraid of being encapsulated in fixed, traditional collective agreements.

In fact, in the countries where ICT represents an important sector for their economy, it doesn't seem to suffer from a lack of sectorial collective agreements nationwide; on the other hand, in countries where the ICT sector is characterized by a high fragmentation, such as Italy, the lack of a sectorial collective bargaining, that even means the lack of effective social consultations between the parties at the Government level, might represent a disadvantage.

In fact, well-established sectors attract funds and financial support for the continuing education and training and innovation. The lack of a consolidated identity as other traditional sectors have developed for a long time, makes the ICT sector weaker against the international competitors.

What's happening in Europe

ICT is becoming more and more crucial, a key factor for competitiveness, pervasive in any business and our lives. Yet, several parts of Europe are still not ready to catch the opportunity: a deep mismatch of ICT competences and professionalism is reported by the labour market

The European Commission intends to cope with this challenge: the Digital Agenda for Europe, launched in May 2010 as part of the 2020 Strategy for Europe, in its updated version of December 2012, identifies the new priorities for 2013-2014 ("to-do" list 2020 Strategy for Digital Jobs, European Commission - IP/12/1389

18/12/2012). Within the seven priorities, the Grand Coalition for Digital Skills and Jobs, led by the DG Connect, DG Enterprise, DG Employment and DG Education and Culture, is building up a “multi-stakeholder” partnership to solve the lack of competences in the ICT sector. One of the key issues is to “Improve recognition of qualifications across countries by stimulating take-up of a European certification scheme for digital skills of ICT professionals, based on the existing e-Competence Framework (<https://ec.europa.eu/digital-agenda/node/21022>).

In fact, the e-CF (The European E-Competence Framework) is seen as a possible starting point for a common understanding, a shared language, mutual dialogue between all the key players, companies, education and training, trade unions, policy makers, etc.

The e-CF is a framework including 40 e-competences and five proficiency levels. It is very flexible and founded on a modular conception of any learning, training and career paths (www.ecompetences.eu). Based on competences, it provides a new way of considering ICT professionals, employees, workers as a whole, their skills, developments and career paths; a new basis for e.g., sectorial centralized/decentralized bargaining revision and renewal as just started in Italy.

In this scenario, the Grand Coalition for Digital Skills and Jobs is encouraging and promoting the creation of “pledges” between the parties involved in the labour market issues, about the common use of the e-CF and possible concrete actions together to enhance skills and employability.

On the other hand, DG Employment has launched the three year project ESCO, a shared European classification of the sectoral professions (covering all industry and user sectors), aimed at facilitating the international job-matching between companies and workers, and hence a sound, transnational mobility, as well as the competence development through shared education and training paths (<http://ec.europa.eu/social/main.jsp?catId=1042&langId=en>).

Accordingly, ESCO for the ICT sector (based on the e-CF) can become another tool facilitating the dialogue between the parties and the Government, even at transnational level.

Which role the European social dialogue may have in the ICT sector

This European scenario can give the cue to conceive and propose new forms of dialogue between the parties, more coherent with the need of flexibility and compatible with the demands of service companies, dynamic, and focused on innovation and growth.

European Social dialogue can really contribute to foster innovative solutions to facilitate employability and workability in the ICT sector, and work together to the development of a common innovative framework of a European ICT sectoral collective agreement, flexible and in line with the ICT sector’s specific requirements. In respect to that,

- To what extent can considering competences (and the e-CF itself) the starting point of sectorial bargaining help this innovation process?
- To what extent can a Pledge on such topic signed by the European representatives of the social parties involved help speed up the process?

Furthermore, the certification issue is a topic that is to be included in the social dialogue agenda. How can certifications become an instrument for employability, occupation, and innovation? How can they help the job match between workers and SMEs? Social dialogue should help this system implementation and regulation be accepted by the parties.

References

For the information included in the brief national overview which introduces each analytical card:

- http://www.eurofound.europa.eu/eiro/country_index.htm the European industrial relations observatory online which can be browsed by country. It provides background information on industrial relations in the EU member states and a number of other countries.
- Robbert van het Kaar and Marianne Grünell, HIS, Industrial relations in the information and communications technology sector, Eironline Comparative study 2001. <http://www.eurofound.europa.eu/eiro/2001/08/study/tn0108201s.htm>
- <http://www.worker-participation.eu/National-Industrial-Relations/Countries> the Gateway to information on worker participation issues in Europe. It summarises key features on how the industrial relations are arranged in the different member states and provides a list of useful links for each country.

More national resources concerning each specific country are directly reported in pagenote across the report, such as national offices of statistics, government website and national reports.

The main websites screened in the top-down approach:

- BASTUN Baltic Sea trade Union Network <http://www.bastun.nu>
- BUSINESSEUROPE <http://www.businesseurope.eu>
- CEA - PME Confederation Europeenne des Associations de Petites et Moyennes Entreprises <http://www.cea-pme.org>
- CEEOA Central and Eastern European Outsourcing Association <http://ceeo.org>
- CEPIS Council of European Professional Informatics Societies <http://www.cepis.org>
- CESI - European Confederation of Independent Trade Unions <http://www.cesi.org>
- DIGITALEUROPE <http://www.digitaleurope.org>
- EAI - European Alliance for Innovation <http://eai.eu>
- ECTA European Competitive Telecommunication Association <http://www.ectaportal.com>
- EITO European Information Technology Observatory <http://www.eito.com>
- ETNO <http://www.etno.be>
- ETUC <http://www.etuc.org/a/82>
- EURO ISPA <http://www.euroispa.org>
- Global Unions Database <http://www.youunionize.info/>
- ICT CLUSTER Bulgaria [http://www.i3p.it/files/3\[1\].%20ICT%20Cluster%20-%20BULGARIA.pdf](http://www.i3p.it/files/3[1].%20ICT%20Cluster%20-%20BULGARIA.pdf)
- IMF International Metalworker Federation <http://www.imfmetal.org>
- IndustrialLL- European trade Union <http://www.industrialll-europe.eu>
- IndustrialLL - Global Union <http://www.industrialll-union.org>
- IOE International Organisation of Employers <http://www.ioe-emp.org>
- IT STAR <http://www.starbus.org>
- ITBEurope <http://www.itbeurope.org>
- ITUC <http://www.ituc-csi.org/?page=abook&lang=en>
- PIN-SME <http://www.pin-sme.eu>
- UEAPME <http://www.ueapme.com>
- UNI ICTS Global Union <http://www.uniglobalunion.org>
- VISEGRAD GROUP <http://www.visegradgroup.eu/about>
- WITSA - World Information Technology and Services Alliance <http://www.witsa.org>