



# Representativeness of the European social partner organisations: Sport and active leisure industry

## Executive summary

### Introduction

This study aims to provide the necessary information to encourage sectoral social dialogue in the sport and active leisure sector. The EIRO series of representativeness studies, carried out at the request of the European Commission, sets out to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). The study thus identifies the relevant national social partner organisations in the sport and active leisure sector via a top-down approach (listing the members of the European affiliations) and a bottom-up approach via the national correspondents from the European Industrial Relations Observatory (EIRO).

The effectiveness of European social dialogue depends on the representativeness of the sector's relevant national actors – only sufficiently representative associations can be parties to European social dialogue.

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

- a) the association's domain relates to the sector;
- b) the association is either regularly involved in sector-related collective bargaining and/or affiliated to any relevant European interest association.

A European association is considered to be a relevant sector-related interest association if it is on the Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU and/or participates in sector-related European social dialogue and/or has requested consultation under Article 154.

### Defining the sector

For the purpose of this study, the sport and active leisure sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE) (Rev. 2), to ensure the cross-national comparability of the findings. More specifically, this sector is delineated by NACE code R 93.1 (sports activities) – with R 93.2 (other amusement and recreation activities) being outside its remit.

### Economic background

The European sport and active leisure sector covers three main segments: not-for-profit sport, professional sport and active leisure. Despite the lack of reliable data, there is no doubt that sport and active leisure has been a dynamic and fast-growing area for many years due to the diversification of sport activities, the developing leisure industry and the globalisation, professionalisation and commercialisation of sport.

However, the sector is characterised by a high degree of associational fragmentation on both sides of industry at national and European level. This is because the different activities are traditionally based on very diverse organisational structures. Moreover, national social partner organisations within the sector, where they exist, tend to record relatively low levels of organisation as the sport movement is rooted in non-profit organisations and in volunteering. However, professionalisation has increased the need for formalised industrial relations structures.

### Employment characteristics

In terms of employment, the sector is not very large, the share in aggregate employment being under 1% in all countries except Ireland, Malta and the UK. The UK holds an outstanding position with more than 400,000 people in paid employment in the sector. According to Eurostat data (second quarter of 2011), the EU sport and active leisure sector employed about 1.44 million people.

## Recent developments

In contrast to most other sectors, the economic crisis had only minor repercussions on the sector's labour market. However, some countries (Austria, Bulgaria, France, Greece, Luxembourg, the Netherlands, Slovenia and Sweden) have been affected by cutbacks in private sponsorship of professional sport while other countries (Hungary and Ireland) have recorded a significant decline in government funding for sport.

## National level of interest representation

### Trade unions

Given the complex and diverse organisational structures of the world of sport at national level, not all of the national affiliates to the relevant sector-related European-level employee representatives can be identified as genuine trade union organisations. In fact, some of these affiliates are hybrid organisations often operating as guardians of sporting rules rather than industrial relations actors.

Of the 27 countries under consideration, all but four (the Czech Republic, Estonia, Latvia and Slovakia) record at least one sector-related trade union. The scale of the unions involved differs greatly across Europe, ranging from over 2.2 million members of ver.di in Germany (not all in this sector) to only 60 SPS members in Lithuania. In total, 91 sector-related unions fulfilling the criteria for inclusion in the representativeness study were identified.

Some 35% of the unions represent 70% or more of the active employees covered by their domain; about 12% organise less than 15%; and about 28% record a density of between 15% and 50% of their potential active members. These results indicate that overall domain density of the sector-related trade unions tends to be relatively high.

### Employer organisations

In total, 83 sector-related employer organisations in 20 countries were identified. Cyprus, the Czech Republic, Estonia, Lithuania, Luxembourg, Malta and Slovakia had no sector-related employer organisation matching at least one of the two criteria for inclusion. In five countries, there is only one single organisation, demonstrating the prevalence on the employer side, as on the union side, of pluralist associational systems. In 12 countries, at least one organisation is not a party to collective bargaining: they are classified as social partner organisations only because of their affiliation to

one or more of the sector-related European-level employer organisations considered in this study.

### Collective bargaining

Owing to the sector's complex organisational structure and the lack of strong, well-established sectoral social partners in many countries, industrial relations tend to be relatively poorly developed across the Member States. Five of the 20 countries with related data (Belgium, France, Italy, Romania and Spain) record sector-related collective bargaining rates of more than 90%, just two countries (Finland and Sweden) record medium levels, while the remaining countries indicate low or very low levels.

## European level of interest representation

The sport and active leisure organisations listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU are UNI-Europa Sport, EU Athletes and FIFPro representing employees and EASE, EHFA, EC-OE, EPFL and ECA representing employers.

About 40% of the trade unions listed are directly affiliated to UNI-Europa Sport. EU Athletes and FIFPro count 21 and 20 direct members, respectively, thus generally covering the largest Member States through affiliations of unions from these countries. The most prominent exception in this respect is Germany, which lacks any affiliation to FIFPro. However, European organisations other than UNI-Europa Sport, EU Athletes and FIFPro represent a relatively large proportion of both sector-related trade unions and countries.

Most employer associations are affiliated to EASE, EHFA, EC-OE, EPFL and ECA. One other European association, UEFA – covering three countries – participates in the existing sectoral social dialogue committee in the professional football sector. However, since it does not consider itself to be an employer representative or an industrial relations actor, it is not deemed to be a representative sector-related European organisation.

## Conclusions

The study concludes that UNI-Europa Sport, EU Athletes and FIFPro on the employee side and EASE, EHFA, EC-OE, EPFL and ECA on the employer side should be regarded as the most significant EU-wide representatives of employees and employers in the sport and active leisure sector.

### Further information

The report *Representativeness of the European social partner organisations: Sport and active leisure industry* is available at <http://www.eurofound.europa.eu/eiro/studies/tn1105058s/index.htm>

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