

Competitive structures and collective bargaining in the commerce sector throughout Europe

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Outline of this presentation



- 1. Competition and employment in commerce throughout Europe, 2007/08-current**
 - 1.1-1.2 Sales of 'top-20' European commerce employers**
 - 1.3 via sales per employee to**
 - 1.4-1.5 employment in 'top-20' and 'top-10' European commerce employers**

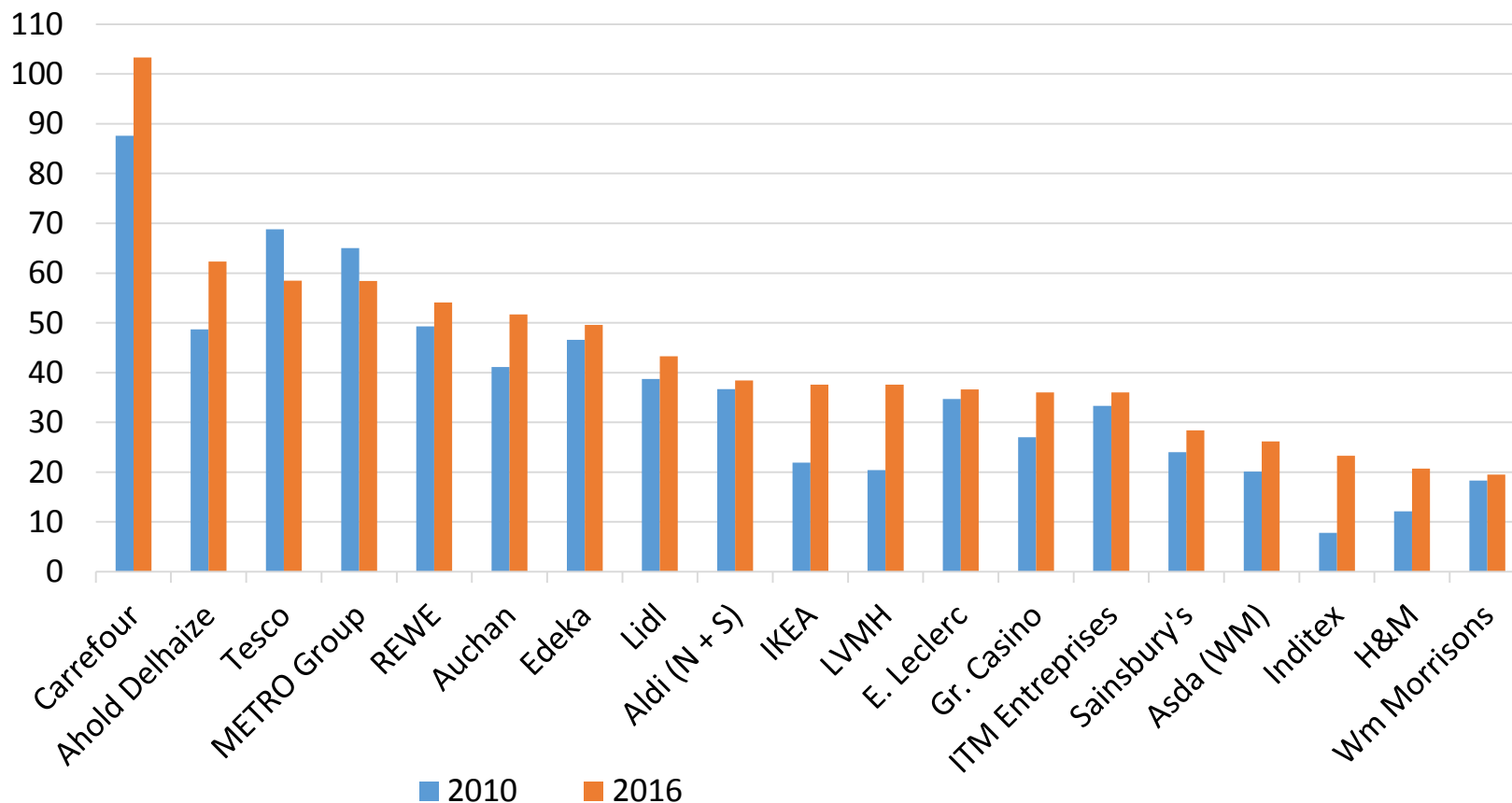
- 2. Foreign Direct Investment (FDI) and employment, 2008-current**
 - 2.1-2.2 FDI and employment across commerce sub-sectors**
 - 2.3 taking into account size of sub-sectors**
 - 2.4 Increase/decrease of employment across sub-sectors**
 - 2.5 Increase/decrease of employment across countries**

- 3. Relationship of employment in commerce with national income (GDP) and with collective bargaining, 2008-2014**
 - 3.1 Development of employment and GDP**
 - 3.2 Development of employment and TUD, CBC and MEB**
 - 3.3 The importance of trade unions and employers' organisations**

1.1 Competition in European commerce: development of sales of 'top-20' employers, without ...



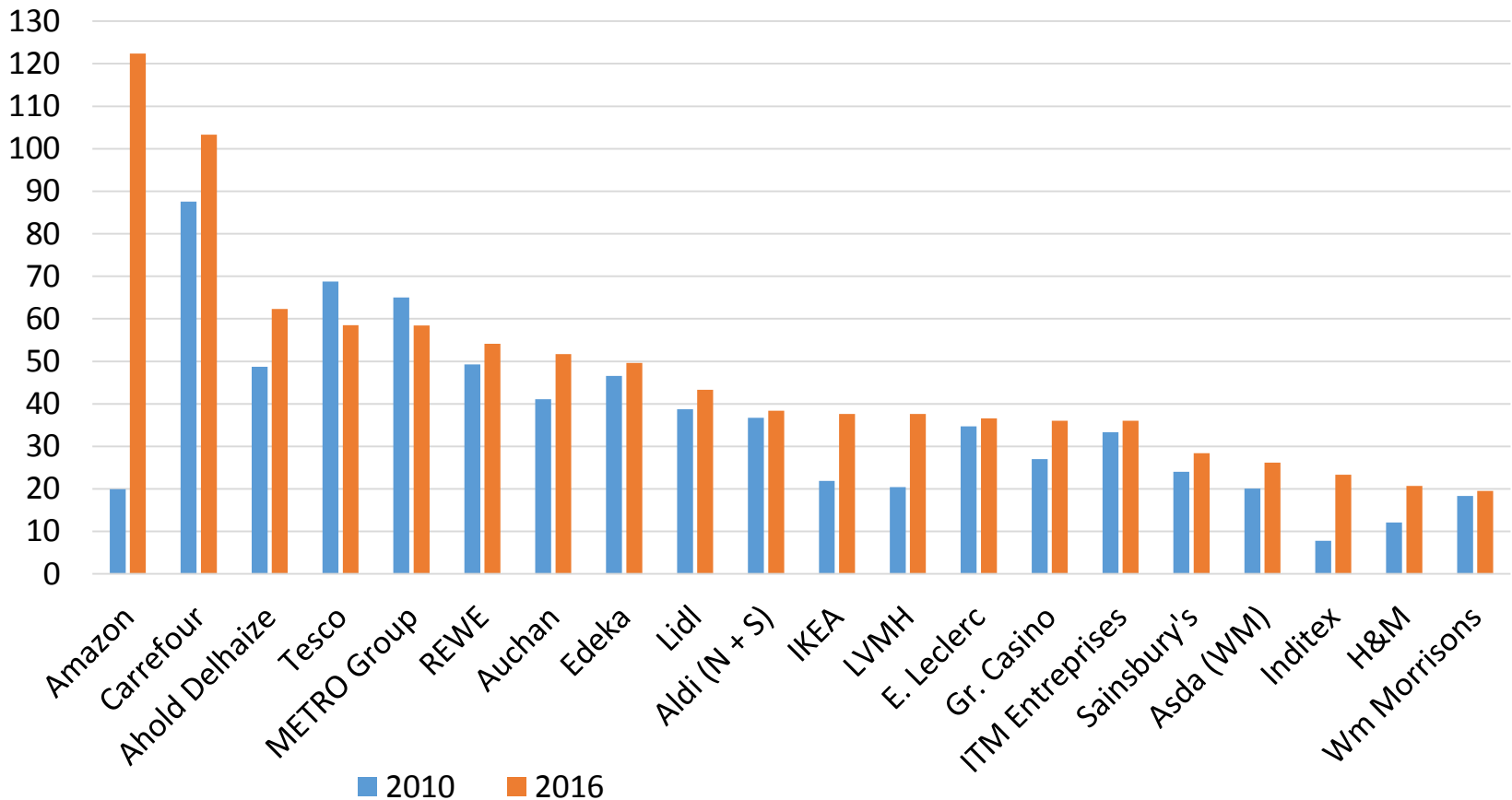
Net sales of 20 largest European commerce employers, 2010 and 2016, in billion Euro



1.2 Amazon, or including this 'wholesaler'



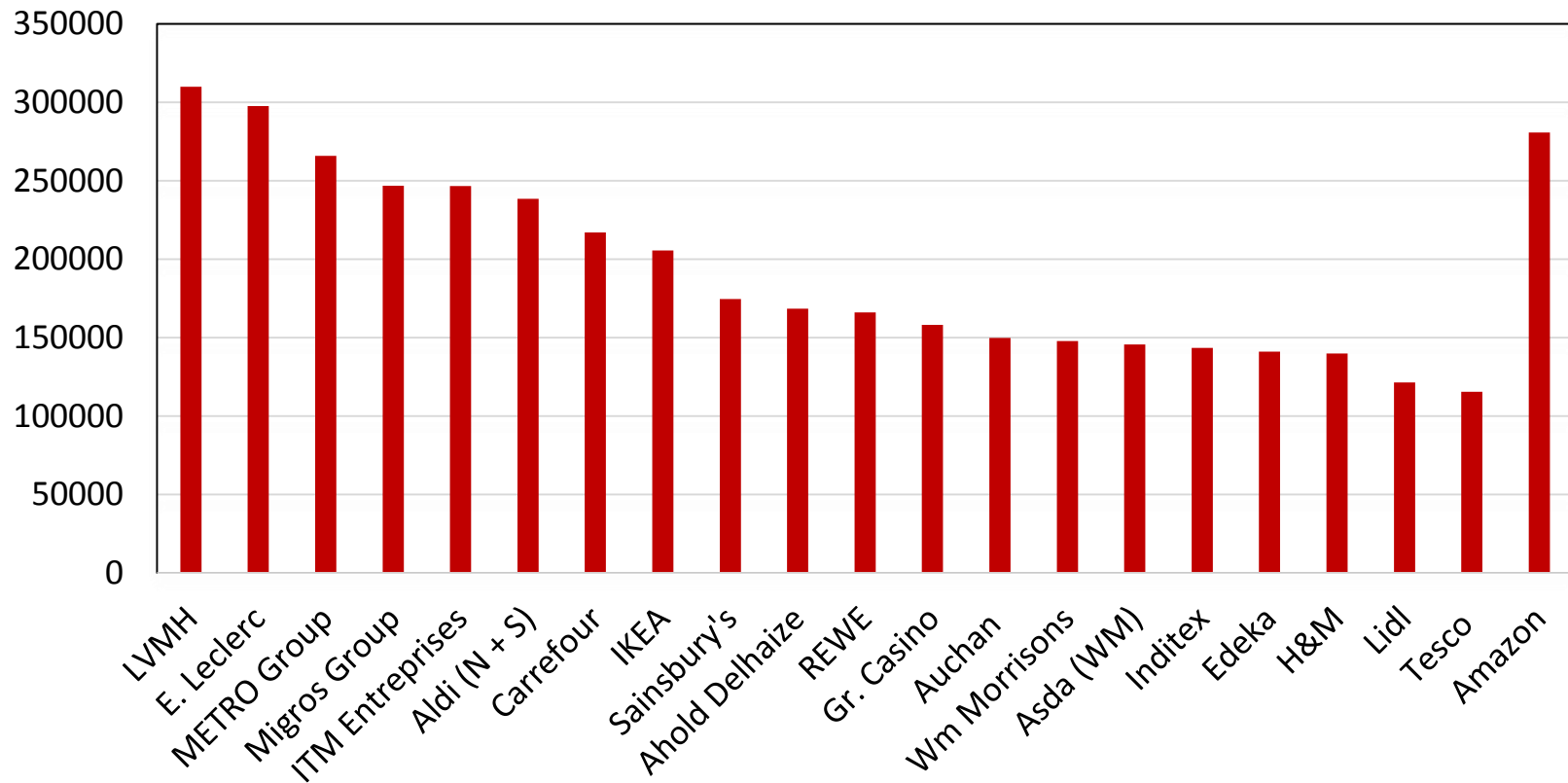
Net sales of 20 largest European commerce employers + Amazon, 2010 and 2016, in billion Euro



1.3 ... while taking into account: sales per employee ...



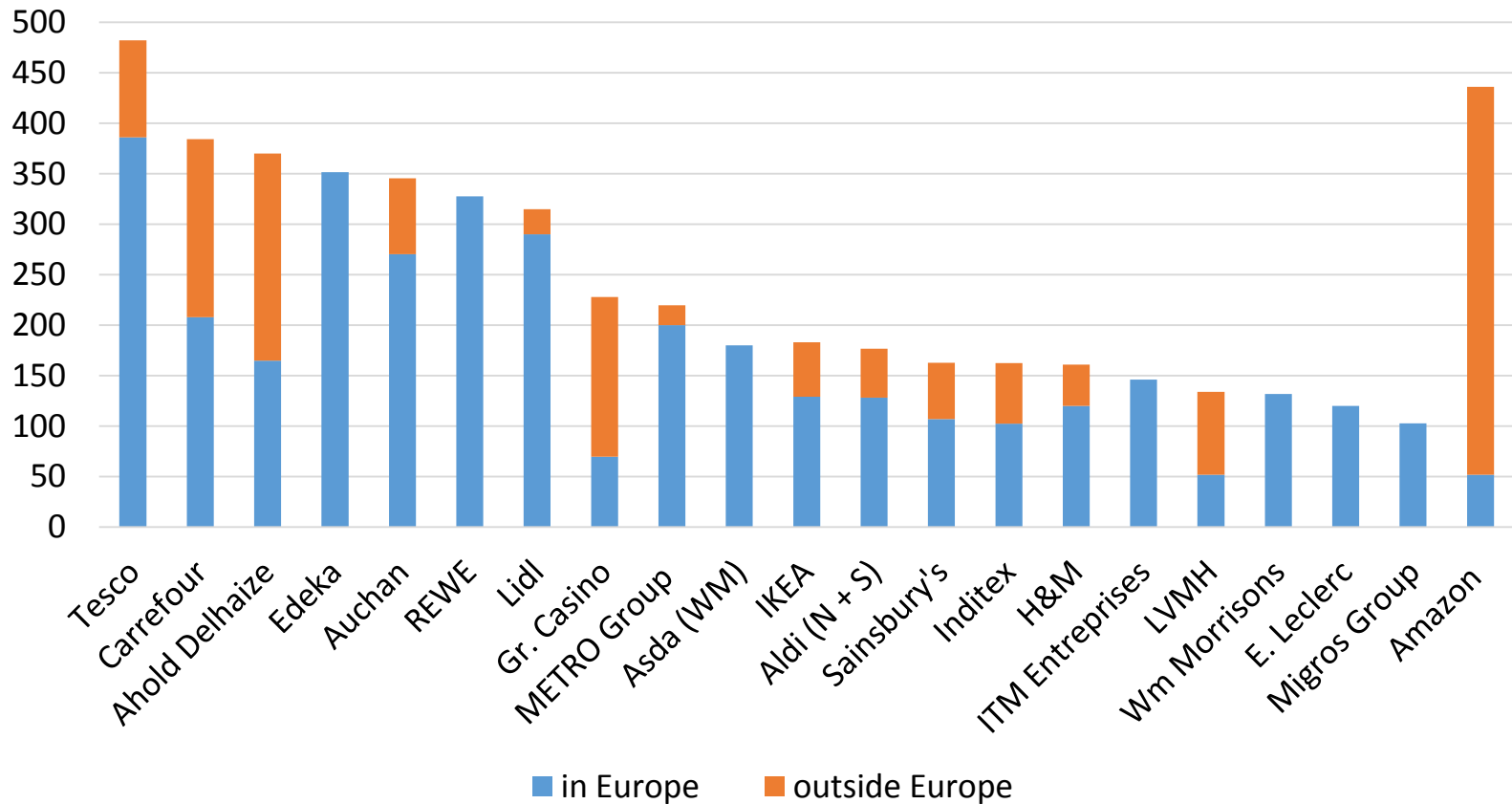
Net sales per employee of 20 largest European commerce employers
+ Amazon, 2016, in Euro



1.4 ... ending up in employment, albeit not always in Europe ...



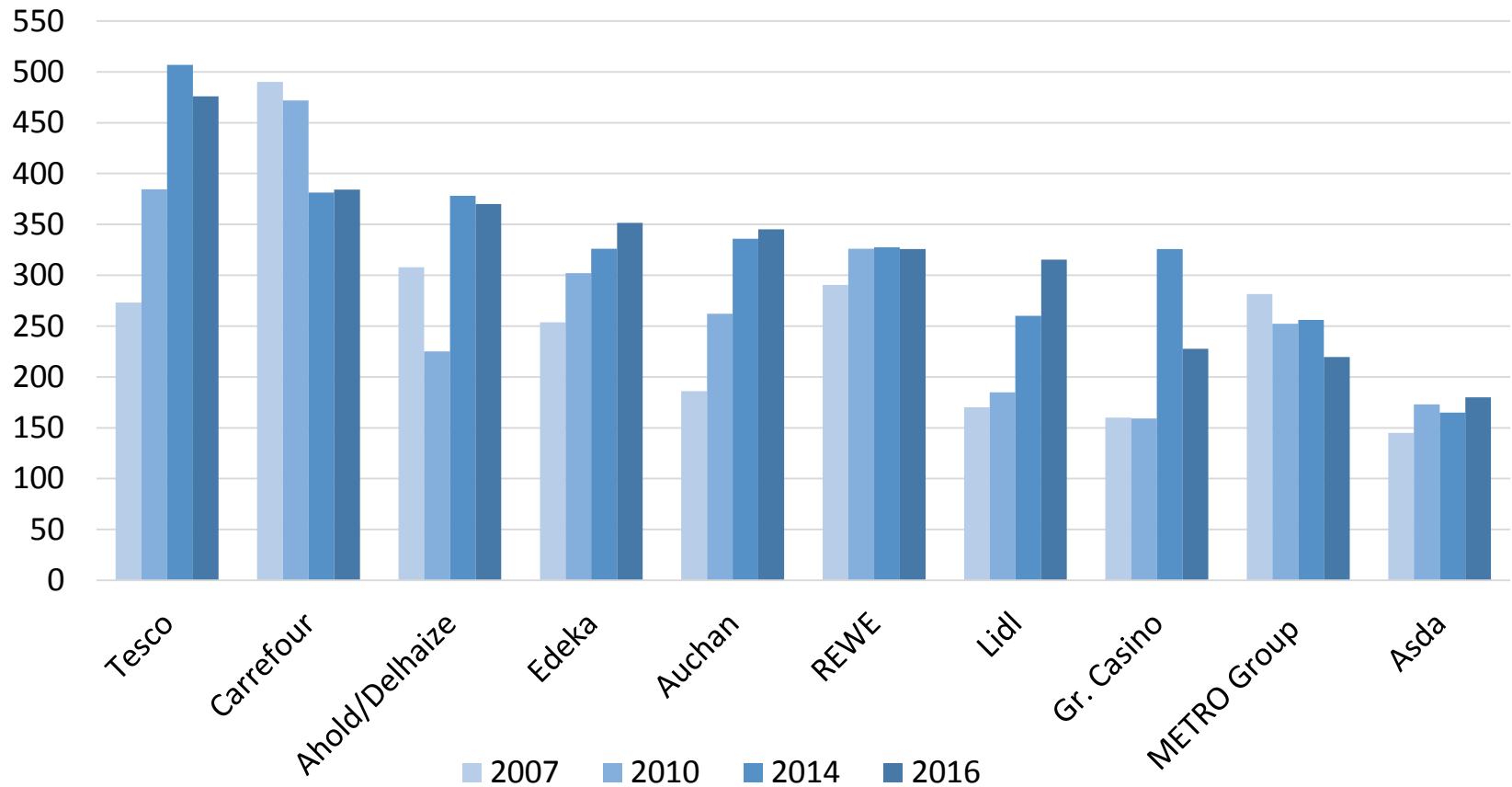
No. of employees in 20 largest European commerce employers + Amazon, 2016, x 1,000



1.5 ... with ups and downs, also for the 'top-10' in commerce



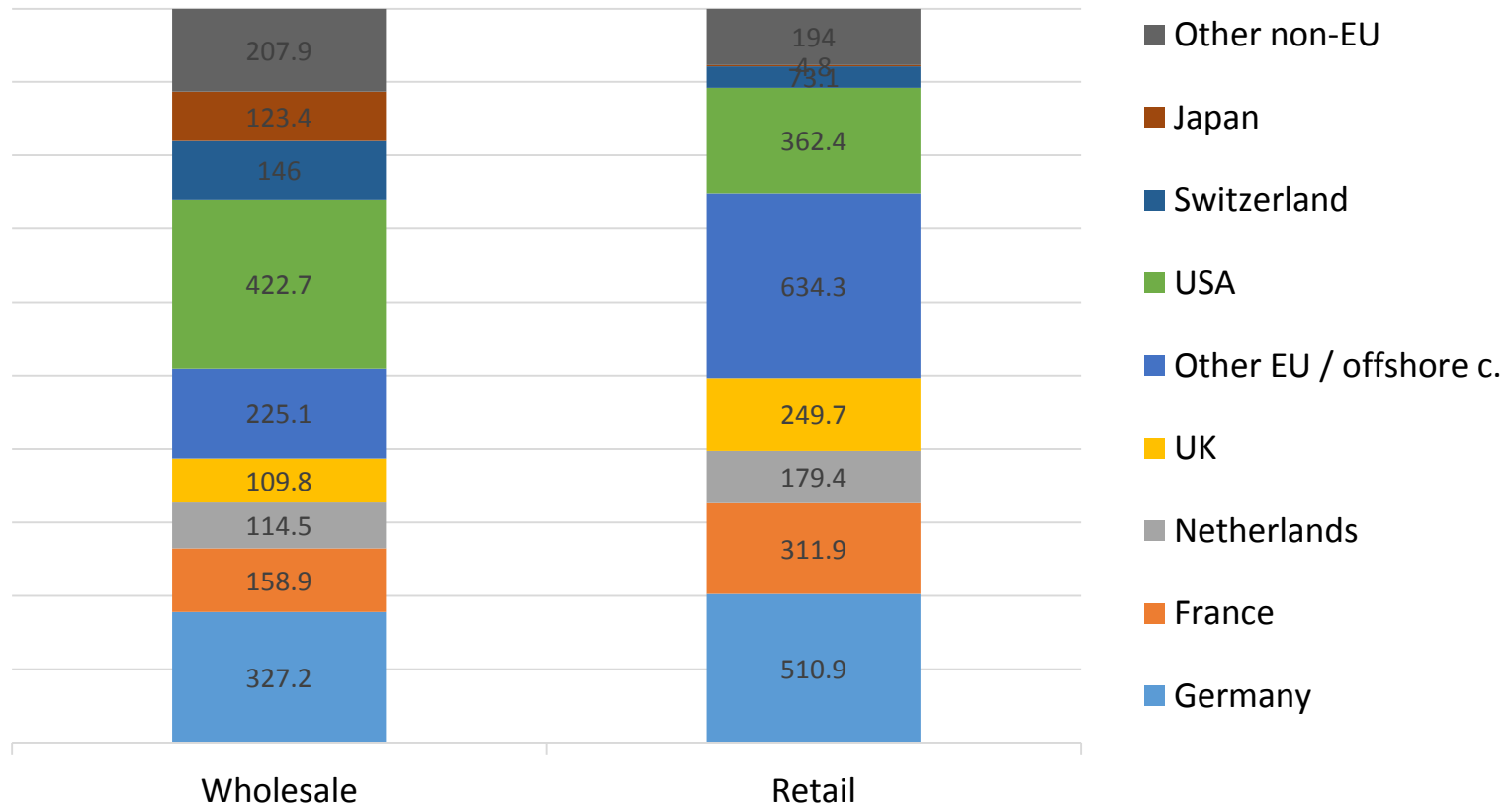
No. of employees in 10 largest European commerce employers
(x 1,000), 2007-2010-2014-2016



2.1 Employment also relates to Foreign Direct Investment (FDI)



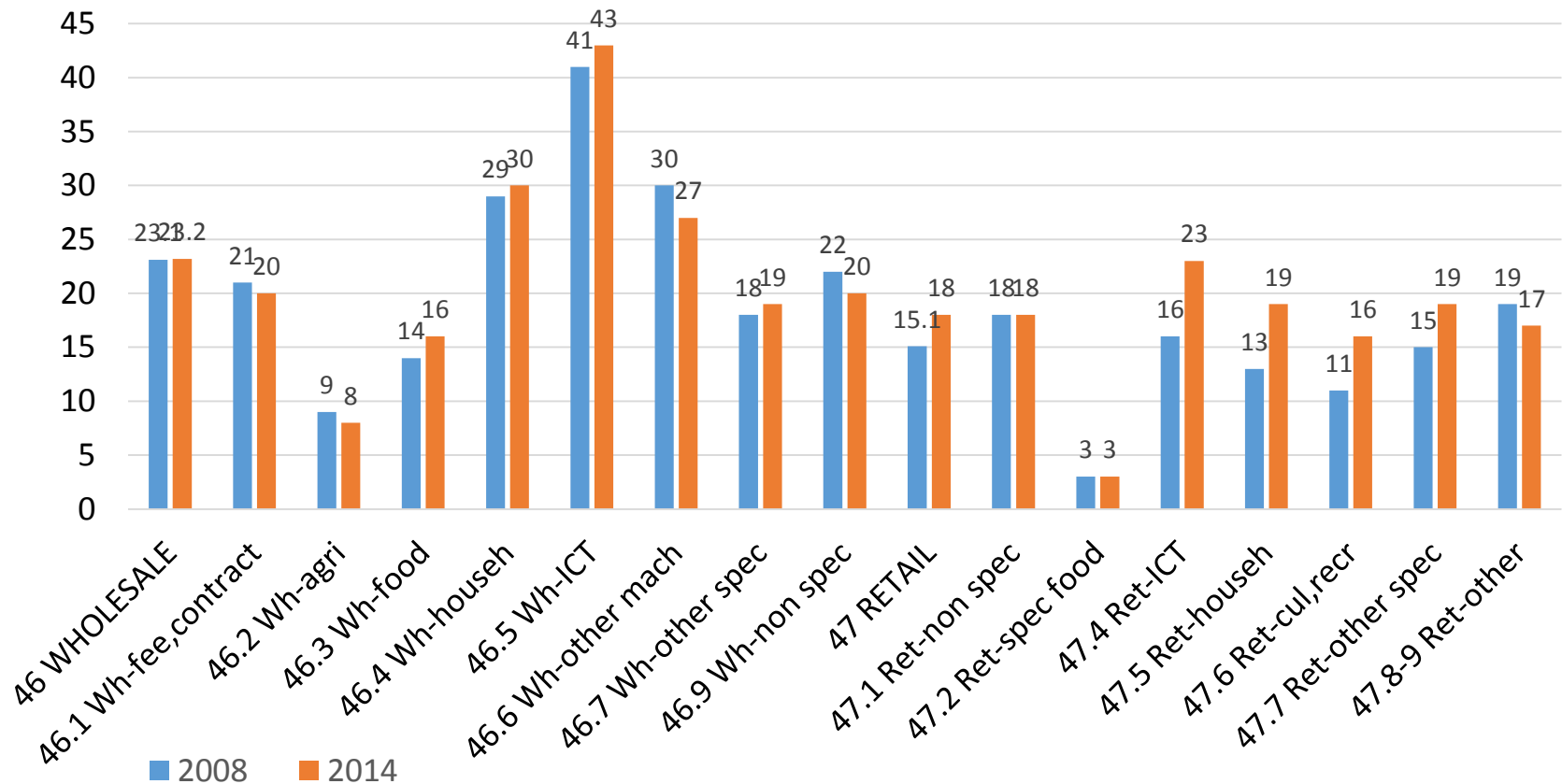
FDI-related employment in commerce in EU28 by country of origin of investor (x 1,000 employed), 2014



2.2 ... with employment related to FDI growing but varying by sub-sector ...



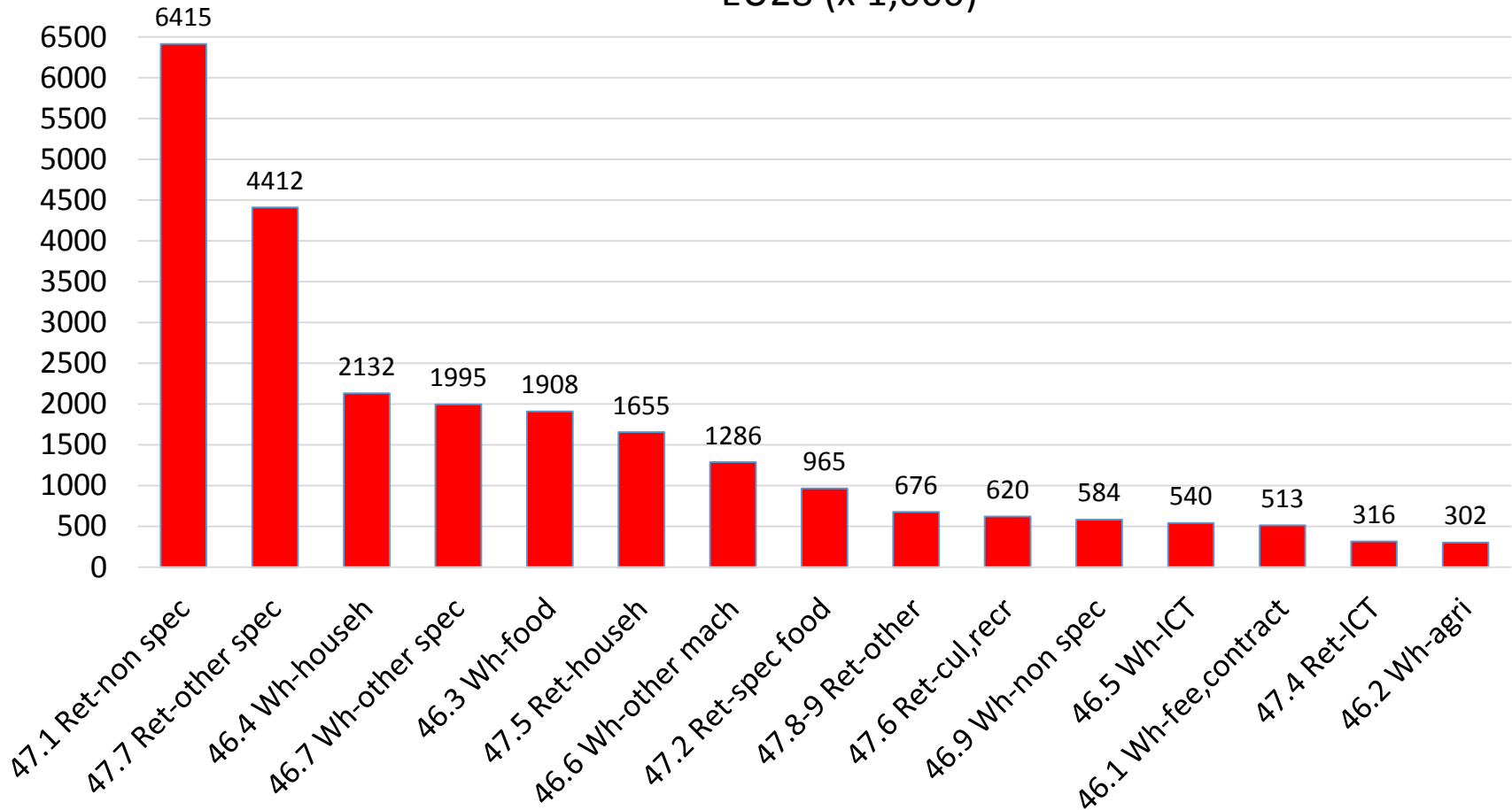
Shares of FDI-related employment in EU28 in commerce by sub-sector, 2008 and 2014



2.3 ... whereas these sub-sectors differ anyway widely in size ...



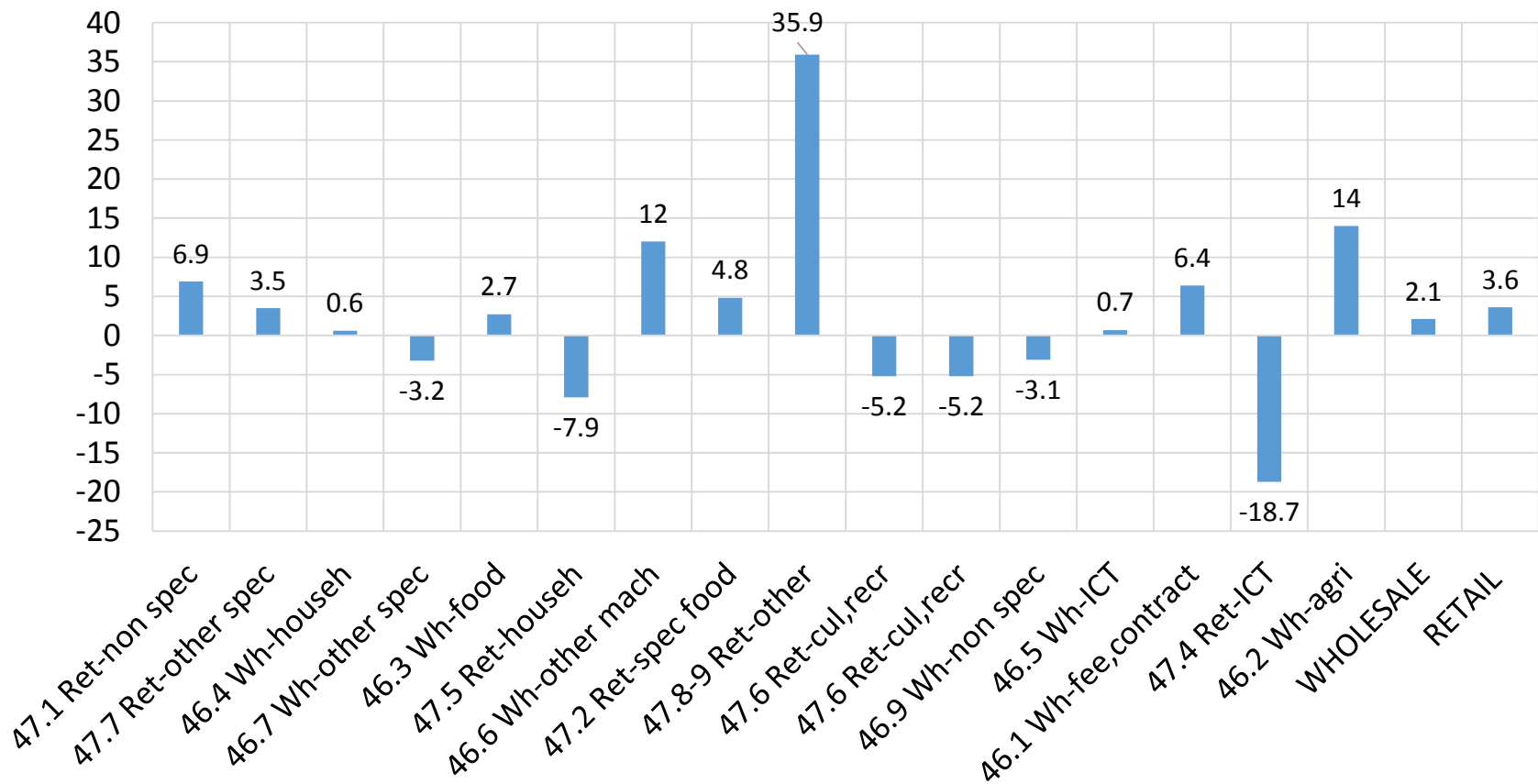
No. of employees in commerce by sub-sector, 2015,
EU28 (x 1,000)



2.4 ... and in increase / decrease of employment, across sub-sectors ...



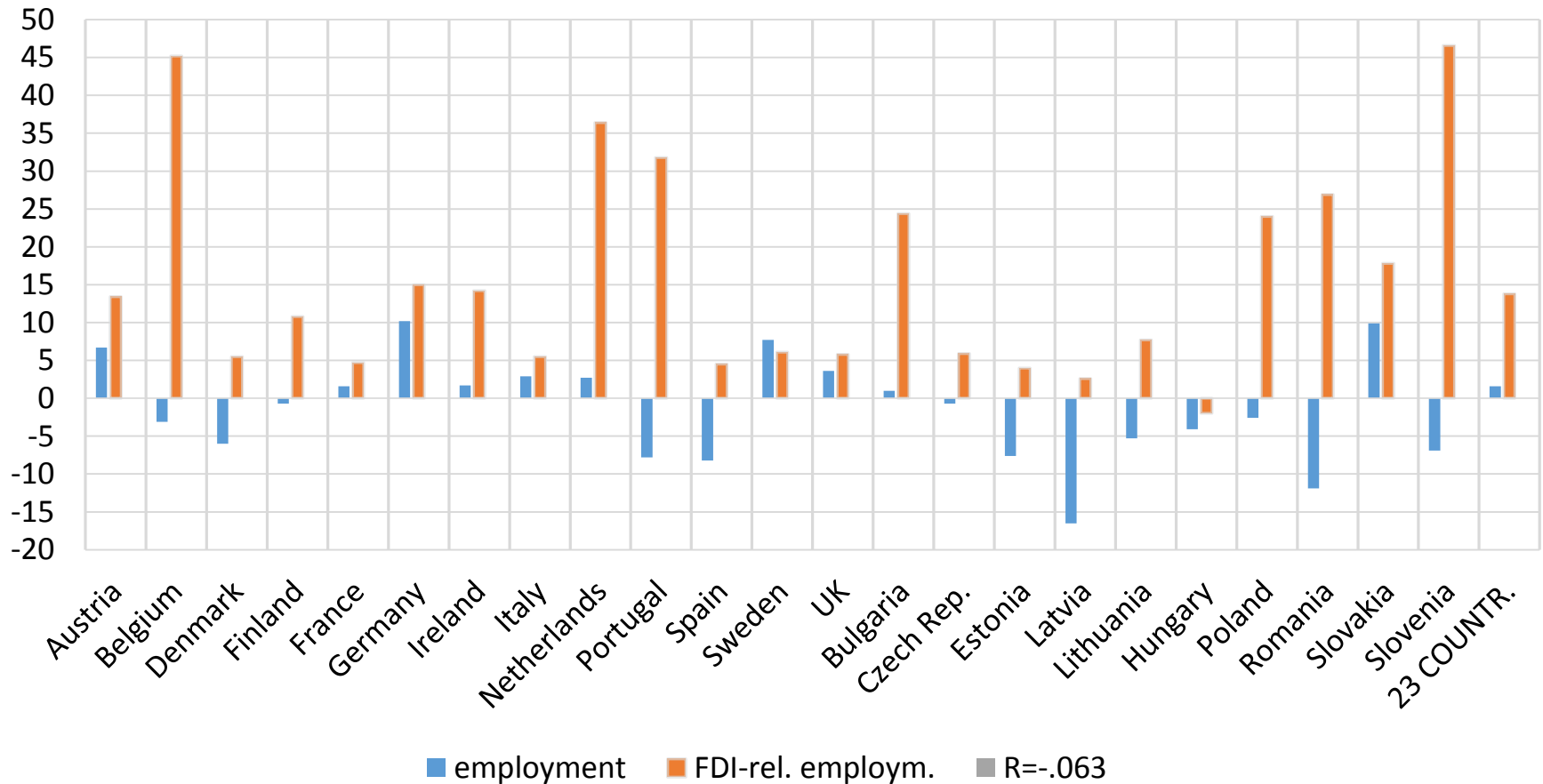
% change in no. of employees in commerce by sub-sector, 2008-2015, EU28



2.5 and across countries, by total and FDI-related employment



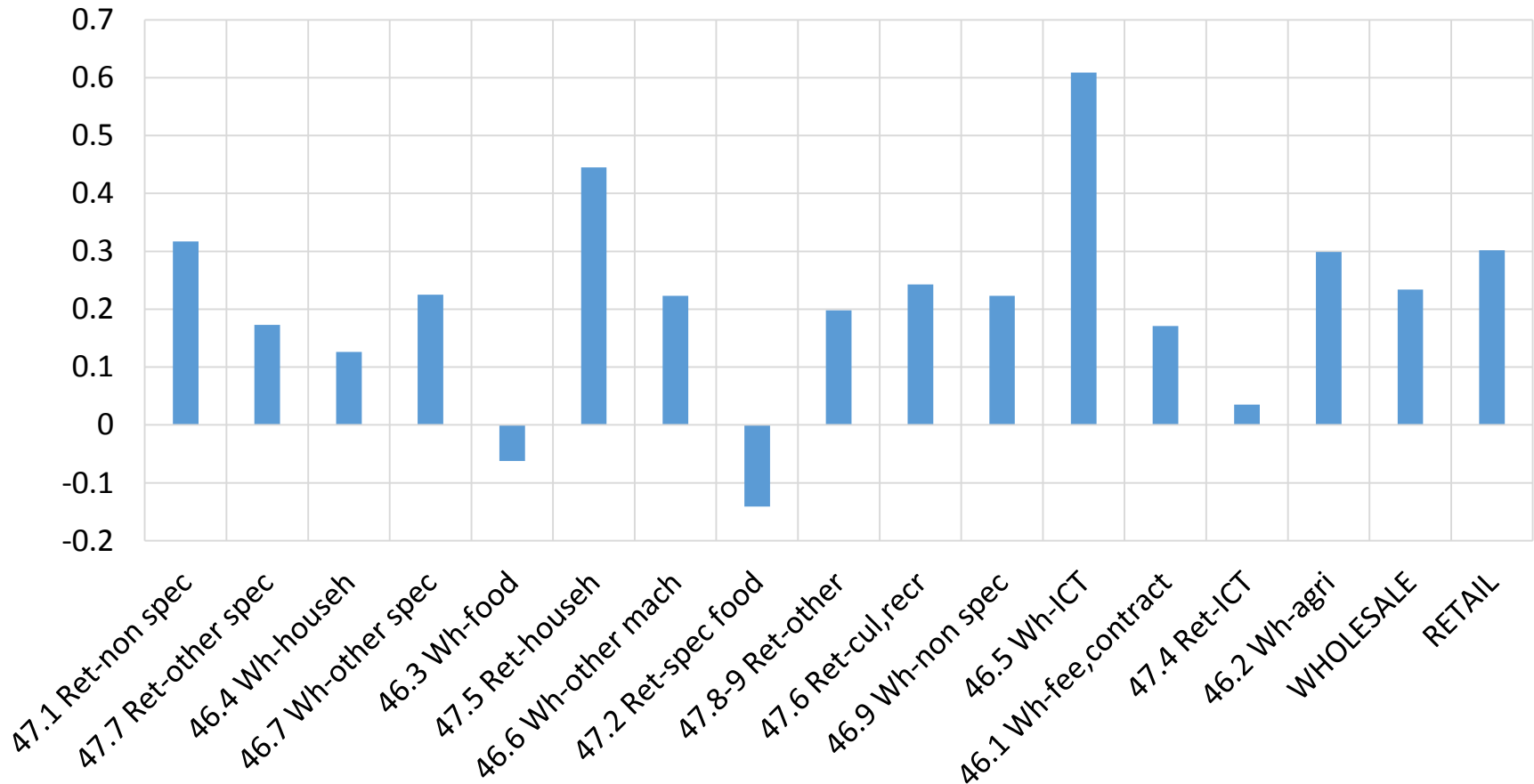
% change in employment in commerce by countries, total (2008-15) and FDI-related (2008-14), EU23 (excl. CY, EL, HR, LU, MT)



3.1 Economy and employment: the relationship between development of Gross National Product (GDP) and employment in commerce



Correlations between development of GDP and of employment in commerce by sub-sector, 2008-2014, 23 EU countries (*R* values)



3.2 and how does in/decrease of employment relate to collective bargaining?



- Connect increase/decrease of employment in commerce in 2008-2014 with industrial relations in the industry: trade union density (TUD), collective bargaining coverage (CBC) and multi-employer bargaining (MEB) in 2013/14,
- for 23 EU countries by calculating correlation coefficients (R) for development of employment versus development of TUD / CBC / MEB: 1.00 = totally positive relationship, 0.00 = no relationship, -1.00 = totally negative relationship,
- allows as conclusions:
 - countries with higher TUD, CBC and MEB rates in commerce did better in terms of employment growth, notably for overall employment / CBC
 - relatively high employment growth in commerce is not at odds with high CBC and MEB rates neither, to some extent, with high TUD
 - → trade union membership and collective bargaining do not disturb 'going business'

R	Trade union density (TUD)		Collective bargaining coverage (CBC)		Multi-employer bargaining (MEB)	
Employment	0.187	*	0.530	**	0.307	*
FDI-related employment	0.113		0.322	*	0.331	*

3.3 But what about the importance of trade unions and employers' organisations for collective bargaining?



- Missed for commerce information on employers' organisation density (EOD) in too many countries → inclusion of EOD only possible with national data (WIBAR3 research outcomes)
- Connect development of TUD and EOD with that of CBC and MEB year-by-year for two periods, 2001/02-2007 (1st period) and 2007-2013/14 (2nd period), for 23 EU countries
- Allows as conclusions (not in Table: correlation CBC – MEB > 0.900):
 - Changes in TUD hardly relevant for changes in CBC and MEB, thanks to extension mechanisms in large majority of countries → importance of supportive state policies
 - Over time, high MEB is key to maintaining high CBC
 - Changes in EOD have substantial influence on changes in CBC and MEB → importance of existence of strong employers' organisations willing to engage in meaningful collective bargaining = multi-employer bargaining → employers should realize advantages of MEB
 - Cannot be decoupled from deployment of trade union power!

<i>R</i>	TUD 2001-2007	TUD 2007-2013/14	EOD 2001/02-2007	EOD 2007-2013/14
CBC 2001-2007	-.197		0.658***	
CBC 2007-2013/14		0.034		0.370*

That's it!



Thank you for your attention 😊 😊

Questions? Today +
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