Vandaele, Kurt

Book

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Contents

Abstract

This report provides descriptive evidence of shifts in trade union membership and density at the aggregated level in 32 European countries since 2000, with a particular focus on the current age structure within trade unions. Substantial cross-country variation in unionisation levels remains, and the least unionised countries in the 2000s have largely stayed at the bottom of the 'unionisation league' in the 2010s, while countries with a medium and high average level have maintained their positions in the middle or at the top, irrespective of developments in unionisation. Countries with a moderate to high union density have generally been able either to limit membership shrinkage, or to increase membership. Yet, overall, membership and density rates are heading downwards in most countries, and very drastically in Central and Eastern Europe. Trade unions are not only struggling to keep membership developments in line with growing employment rates but are also 'greying'.

While the unionisation gap between younger and older workers is not new, fewer young people have joined a union over the past years in most European countries. The average age of union members is increasing and is higher than the average age of wage- and salary-earners in general. Simultaneously, while young people generally hold positive views about trade unions, they lack knowledge about them. With the loss in membership going hand in hand with a decrease in revenues, it remains to be seen to what extent and how trade unions will address the membership and generational challenges. Much will depend on trade union identities and the framing of the challenges, unions' conception of membership, and their reliance on membership dues for their organisational sustainability. Whatever the case, the magnitude of the generational and member challenges also necessitates trade unions to reach out to other players to help bolster union security, in combination with unions' own (recruitment and organising) initiatives.

Introduction

Membership levels in many trade unions have been in decline in Europe since the 1990s, a trend especially pronounced in Central and Eastern Europe (CEE) (Blanchflower 2007; Ebbinghaus and Visser 1999; Pedersini 2010; Waddington 2005; Visser 2006, 2011). This decline continued and spread in the next decade, becoming almost universal (Bryson *et al.* 2011). The main objective of this report is to map the most recent developments in trade union membership and density in Europe, providing a descriptive analysis of these dynamics. It principally covers trends in union membership in the following 32 countries since 2000: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and the United Kingdom (UK). The main trade union confederations in these countries are affiliated to the European Trade Union Confederation (ETUC).[1]

This report has been compiled as input to the debate on the future of trade unionism in Europe within the ETUC, and on the very future of the ETUC as a European umbrella organisation (see ETUC 2018). As the overview of this report is at an aggregated level, no principal differentiation can be made between membership dynamics between the member organisations of the ETUC and (smaller) non-affiliated trade unions or trade union confederations. Likewise, no distinction can be made between ETUC member organisations within the same country in the case of union pluralism. Occupational, industrial and other differences in unionisation are also masked. Neither the exogeneous and endogenous drivers explaining union membership and density dynamics will be examined here, nor will any (practical) recommendations be made about possible trade union strategies and policies for reversing dwindling membership – both are beyond the scope of this report.[2]

The report thus simply examines union decline, and sometimes growth, in Europe, with particular attention paid to the age structure within trade unions. The reason for this focus is that organising young people is increasingly becoming a major challenge for unions (Hodder and Krestos 2015; Tapia and Turner 2019; Vandaele

1. The following (small) countries, whose national trade union confederations are also ETUC members, are thus not covered: Andorra, Lichtenstein, Montenegro, North Macedonia, San Marino and Serbia. Similarly, Bosnia and Herzegovina, a country with currently one confederation with ETUC observer status, is not included.

2. As is the (positive) impact of unionisation on reducing income inequality (e.g. Tridico 2018; Van Heuvelen 2018) or on fostering democratic values, societal engagement and solidarity (e.g. Rosetti 2019; Turner *et al.* 2019).

2012, 2018b). In fact, among the various categories of under-represented groups in unions, they are considered the 'most problematic group' (Pedersini 2010: 13) in this regard. If these difficulties in organising young people continue unabated, they will deepen the unions' already biased representation of today's more diversified workforce, (further) questioning their societal legitimacy; they will endanger established institutional positions and their countervailing power required for effective collective bargaining and social dialogue (Traxler *et al.* 2001); and, finally, they will also constrain unions' generational renewal and imaginative thinking needed for their own organisational survival. Other demographic characteristics like gender or ethnicity will not however be analysed in detail in this report. The same applies to union membership data disaggregated according to employment, workplace and industry characteristics such as contract type, workplace size or economic sector. This does not mean that those features are not important. Quite the contrary, workers should not be considered and organised as an entirely homogenous group defined by age; their diversity, whether based on demographic or other characteristics, and their subjective understandings of their job quality should be taken into account in any union strategy and policy for organising (young) people.

Despite the considerable country differences in trade union density, we should emphasise here that 'there are many similarities in the characteristics of union members across countries in terms of the industry where they work, their race, gender and whether they are employed in the public or private sectors' (Blanchflower 2007: 4). Whereas longitudinal compositional shifts in union membership have taken place over time (Visser 1990), and country-specific idiosyncrasies cannot be excluded, fairly similar empirical patterns in unionisation in terms of union members' characteristics can be found across Europe today (Ebbinghaus 2006; OECD 2017; Scheuer 2011). Trade union members are predominantly concentrated in the public sector, including education and health, a feature which goes hand in hand with a rising share of women within unions, especially in the Nordic countries. In fact, women outnumber men among trade union members in 14 of 31 countries today – see Table 4 in Appendix II. The public sector is a union stronghold especially in CEE countries, but also in a number of Western European countries like France and the UK (Visser 2012). The public sector is followed by the manufacturing sector, with blue-collar workers still playing a substantial, yet declining, role, and then the private services sector characterised by low unionisation rates. Partially linked to those long-term shifts in employment is the fact that 'middle- and upper-class employees' are also strongly represented in trade unions in most European countries (Scheuer 2011; Strøby Jensen 2019). Also, workers with an open-ended, permanent contract are more likely to be unionised than workers in non-standard forms of employment like part-time work (OECD 2019).

While unionisation *patterns* are fairly similar across several individual, workplace and other structural characteristics, unionisation *levels* are largely influenced by labour market institutions at macro level, and by normative attitudes towards unionism at individual and societal level. First, it is well-documented that trade union involvement in unemployment insurance systems is an important explanation for a high and stable union density (e.g. Ebbinghaus and Visser 1999; Ebbinghaus *et* *al.* 2011; Van Rie *et al.* 2011; Western 1997; for a historical account, see Rasmussen and Pontusson 2018). The 'Ghent system', named after the Belgian city where this system was successfully introduced, incentivises workers to be a union member by providing access to unemployment insurance. This system institutionally embeds trade unions in the labour market and the welfare state regime in a voluntary unemployment insurance system, whereby state-subsidised union-affiliated funds administer unemployment benefits. Unemployment insurance funds, whose membership is voluntary, are still in place in Denmark, Finland, Iceland and Sweden, while a weaker variant exists in Belgium – in the latter, unions pay out unemployment benefits within a compulsory unemployment insurance system.

Strong institutionalised union access to and presence in the workplace are also essential for unionisation (Toubøl and Strøby Jensen 2014). The degree of access is associated with workplace size, and thus trade union density, and it is no coincidence that members tend to be employed in medium to large companies. Strong workplace access eases union recruitment efforts, as does a social custom of union membership based on reputational effects – not conforming to the custom may lead to a reputation loss (Visser 2002). While establishing a social custom of membership requires large investments costs, interestingly, it has been demonstrated, in the Danish context, that an actual workplace union density rate of between 45 and 65 per cent produces a self-sustainable social custom (Ibsen *et al.* 2017). Furthermore, strongly centralised collective bargaining systems are also associated with a higher unionisation level, as employers have less incentives to obstruct unions at the workplace (Rasmussen 2017). Also, wage-earners on temporary contracts, as an indicator of precariousness, tend to be more unionised in countries where collective bargaining coverage is wide, although mobilisation efforts by unions play a role as well (Shin and Ylä-Anttila 2017). Finally, the ideological and political attitudes of wage-earners also influence their likelihood to unionise (Toubøl and Strøby Jensen 2014), whereby left-wing views are connected with unionism, while societies with a stronger social capital, in which individuals are more inclined to be active in social networks, are also associated with a higher union density (Ebbinghaus *et al.* 2011).

The report uses two data sources – see also Appendix I. The first source is the Database on Institutional Characteristics of Trade Unions, Wage Setting, State Intervention and Social Pacts (ICTWSS) of the Amsterdam Institute for Advanced Labour Studies of the University of Amsterdam. This ICTWSS database is mainly used for monitoring general developments in trade union membership and density. The second source is the European Social Survey (ESS).[3] This individual-level data is used for describing the relationship between union membership and age. It tends to slightly overestimate union membership as it covers trade unions and 'similar organisations', the terminology used in the ESS questionnaire. Trade union density based on the ESS data is, however, generally a (bit) lower than the assessment of union density based on administrative data. Also, when it comes to subcategories, the sample size might be low. ESS union membership data is used in this report mainly to demonstrate patterns over time and between countries. The

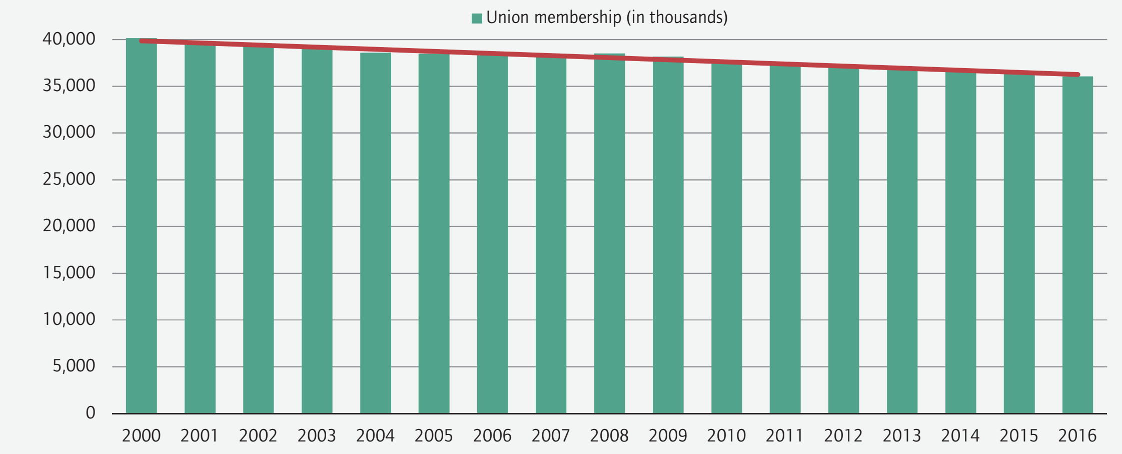
3. See https://www.europeansocialsurvey.org data concerns respondents aged between 15 and 64 years, in paid employment, and a member of a trade union or 'similar organisation'; the self-employed are thus excluded.

This report proceeds as follows. Section 1 provides a snapshot of trade union membership dynamics since 2000. A similar descriptive analysis, this time focusing on union density, is undertaken in section 2. Since demographic change is a fundamental issue for membership-based organisations, the age structure within trade unions is the spotlight of section 3. Section 4 provides an overview of possible different union responses to falls in revenues due to declining membership. The argument is made that such falls do not necessarily imply that trade unions will vigorously tackle the generational and membership challenge since membership levels, revenues and union influence are not always strongly interlinked. This section also adds a touch of optimism to this report by stressing that young people do actually demonstrate union sympathies, although they seem to have less knowledge about unions, and work in general. The appendices of this report provide further details on the sources used, and on the dynamics of union membership and density. Appendix I lists the sources used. Appendix II provides data on the share of women in unions, and unionisation rates among men and women. Appendix III provides respectively further details on the annual development in union membership and density over time in all 32 countries.

1. An almost general decline in union membership

This section charts the extent of the decline in trade union membership from 2000 to 2017 (or the latest year available). 'Non-active' or 'passive' members (i.e. not in employment) like students, the unemployed, pensioners and the self-employed are excluded from the analysis (for details, see Visser 2006). Trade unions may either offer special membership arrangements for (some of) these categories, or their internal rules will not allow them to join. For instance, students, the unemployed or pensioners can be offered free or reduced membership dues, while wage-earners with high unemployment risks in 'Ghent-system' countries have 'selective incentives' to become and remain a union member. Similarly, in Italy, pensioners have an incentive to join a union, as specialised offices run by the unions help them gain access to welfare benefits (Frangi and Barisione 2015). Not all trade unions across Europe have opened up membership to freelancers and other forms of solo self-employment. This is not to say that such member categories and others are not important for trade unions. However, excluding them makes the union data more standardised for country comparisons. Likewise, utilising 'adjusted' union membership for calculating trade union density is also of greater relevance for 'measuring' the associational power of workers in workplaces, companies and industries.

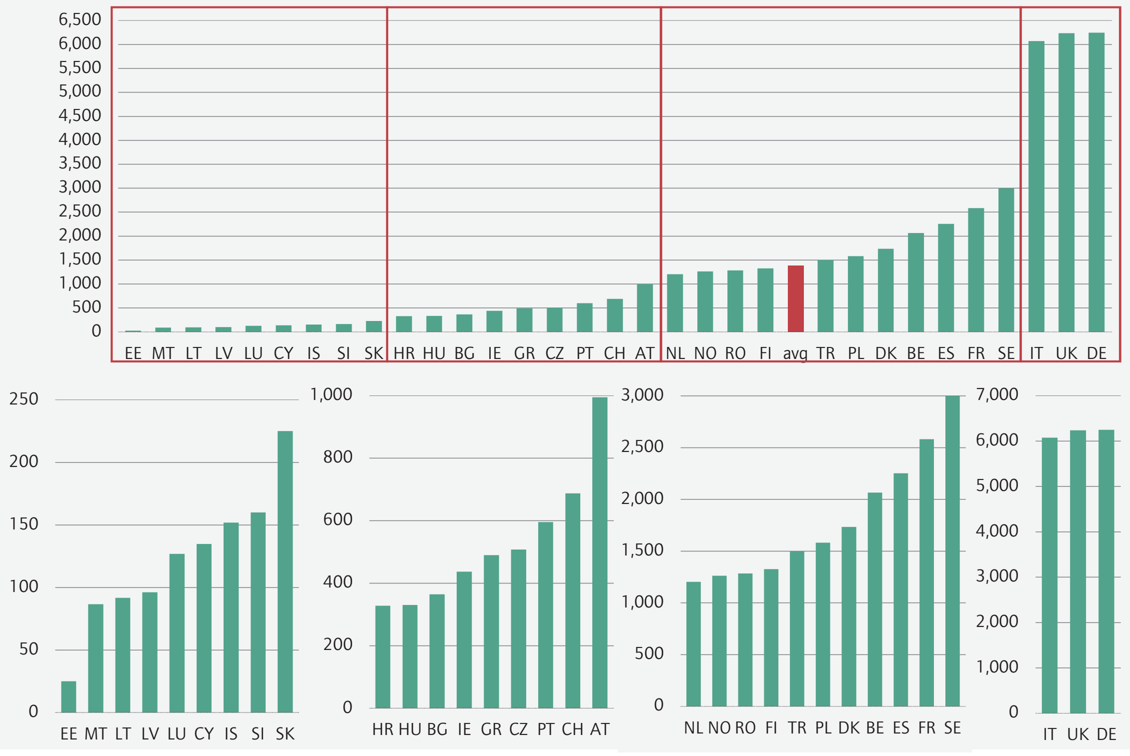
Figure 1. Overall union membership and change in Europe (based on 20 countries), 2000-2016



Source: Visser (2019a).

Overall, membership rates are heading downwards. Whereas total membership in the 32 countries surveyed stood at 45.7 million in 2000, it had declined to 43.4 million in 2016, i.e. at an average rate of -0.1 per cent a year in the period 2000-2016.[4] However, this figure is misleading, as some countries are included for the whole period, others not.[5] The fall in membership can be best grasped if only countries with full data for the whole period are taken into account.[6] Figure 1 shows the dynamics in 'adjusted' or net trade union membership at aggregated level for countries with data for the whole period, i.e. from 2000 until 2016. Membership in those twenty countries decreased from 40.2 million in 2000 to 36.1 million in 2016, i.e. at an average rate of -0.7 per cent a year for the whole period, but with a slightly stronger decline of -0.8 per cent in the most recent period. Dividing the period into a period before and a period after the crisis of the finance-dominated accumulation regime shows an average decrease of -0.5 per cent in the period 2000-2008, rising to -0.8 per cent in the period 2009-2016.

Figure 2. Union membership in 32 European countries, 2017 (or latest year available, in thousands)

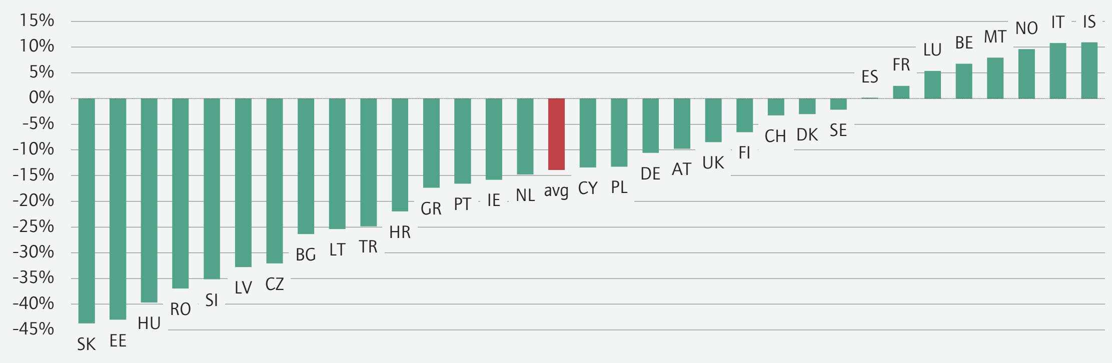


Source: Visser (2019a).

4. Although missing data for certain countries in certain years 'disturbs' the overall picture of union membership trends, the accessions to the European Union (EU) in 2004, 2007 and 2013 could at best only 'produce' a temporal halt to the decline; the same applies to the several eurozone enlargements. A possible Brexit, based on 2016 data, would imply a substantial loss of about 6.2 million union members, or 15.6 per cent, to the EU membership figure.
5. Those countries are Bulgaria, Croatia, France, Greece, Hungary, Iceland, Latvia, Lithuania, Luxembourg, Portugal, Romania and Turkey.
6. Those twenty countries are Austria, Belgium, Cyprus, Czechia, Denmark, Estonia, Finland, Germany, Ireland, Italy, Malta, the Netherlands, Norway, Poland, Slovakia, Slovenia, Spain, Sweden, Switzerland and the UK.

Figure 2 depicts 'adjusted' trade union membership in the 32 European countries in the latest year available, i.e. 2017 for twelve countries. Given the great differences in overall workforce size across countries, it comes as no surprise that the distribution of union membership is markedly asymmetrical across the countries: its skewness and kurtosis stand at 1.99 and 3.57, respectively. Whereas the simple average is 1,379,900 members, the median is 641,600 members. The number of members exceeds one million in large countries like France, Germany, Italy, Poland, Spain, Turkey and the UK. Absolute membership figures are close to each other in Germany, Italy and the UK today, with each having around 6 million members and with these three largely contributing to the skewness of the data. Yet, while there are also more than a million members in Netherlands and Romania – both countries with a medium-sized population –, union membership is also close to a million in Austria, and even above a million or even (much) more in smaller countries, i.e. Belgium, Denmark, Finland, Norway, and Sweden. Nevertheless, even if total membership is below a million, trade unions can still be labelled 'mass organisations' in almost all, if not all, European countries. It is hard to imagine any other member organisations, based on voluntary membership, with such a size. Czechia, Portugal and Switzerland all have more than 500,000 union members, while Bulgaria, Croatia, Greece, Hungary and Ireland all have more than 250,000. Cyprus, Iceland, Luxembourg, Slovakia and Slovenia each have at least 100,000 union members, while only the three Baltic States and Malta have less than 100,000 members (with the lowest number – around 25,000 – in Estonia).

Figure 3. Change in union membership in Europe (32 countries), 2000s vs. 2010-2017



Source: Visser (2019a).

In order to make a very first assessment of the dynamics in union membership at aggregated level, a comparison is made between the membership averages in the periods 2000-2009 and 2010-2017 (or the latest year available) in Figure 3. The intention here is to show the percental change between those two averages for each country. A fall in union membership occurred in 24 of the 32 European countries surveyed, with the decline averaging 13.9 per cent. The decline is modest in (only) three countries: Sweden (-2.2%), Denmark (-3.1%) and Switzerland (-3.3%). Two of these, Denmark and Sweden, are 'Ghent system' countries. The membership loss in these two countries is mainly the result of deliberate policies to weaken the Ghent system (Bockerman and Uusitalo 2006; Høgedahl and Kongshøj 2017).

Policy changes have either affected unemployment benefits, in terms of their duration, coverage or eligibility, or they have encouraged organisations other than trade unions to set up their own unemployment funds. In Denmark, for instance, so-called 'yellow unions', which typically do not participate in collective bargaining and industrial action, are winning members at the expense of the longstanding trade unions (Ibsen *et al.* 2013). Indeed, the success of those yellow unions is masking membership decline within the longstanding unions. A reform of Finland's Ghent system encouraging independent unemployment funds also explains its membership fall (Shin and Böckerman 2019). The country's (-6.5%) average decline is in the 5-10 per cent bracket, accompanying the UK (-8.5%) and Austria (-9.8%).

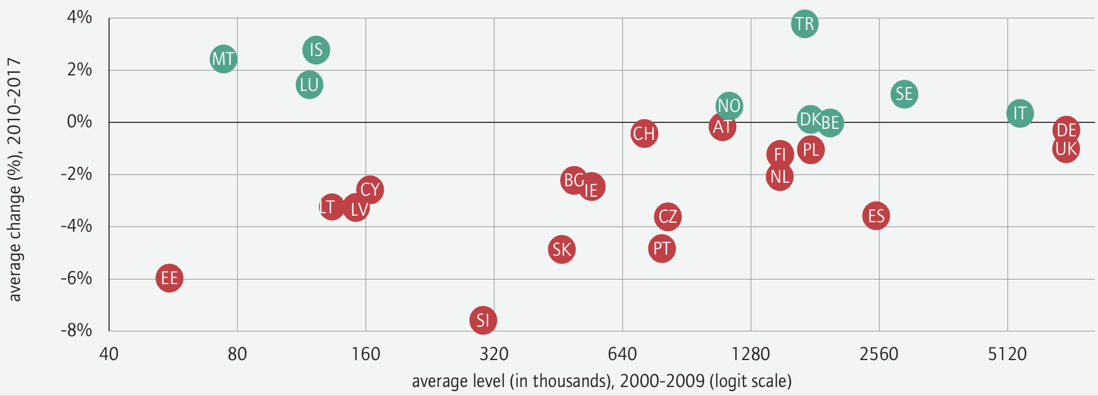
The lost in membership is close to ten per cent in Germany (-10.6%).[7] The continuing erosion of Germany's dual system of industrial relations, with its ongoing shrinkage of the coverage of collective bargaining and works councils, might explain the further German de-unionisation (Addison *et al.* 2010). Nevertheless, Germany's largest union, *IG Metall*, through combining considerable resources, 'organising'-inspired strategies and a bit of (economic) luck, has been able to increase its membership (Schmalz and Thiel 2017). Furthermore, compared to the first decade of the twenty-first century, trade unions have experienced, on average, a substantial decrease in membership between ten to twenty per cent in the period 2010-2017 in six countries: Poland (-13.3%), Cyprus (-13.4%), the Netherlands (-14.8%), Ireland (-15.8%), Portugal (-16.5%) and Greece (-17.4%). A severe decrease in membership exceeding twenty per cent but below thirty per cent, has been registered in Croatia (-22.0%), Turkey (-24.9%), Lithuania (-25.4%) and Bulgaria (-26.4%). Finally, a massive decrease in union membership has taken place in seven CEE-countries: Czechia (-32.1%), Latvia (-32.8%), Slovenia (-35.2%), Romania (-37.0%), Hungary (-39.6%), Estonia (-43.0%) and Slovakia (-43.7%). While such decreases were almost inevitable in the CEE countries in the post-millennium decade, given the abandonment of 'compulsory' membership in the 1990s – a 'relict' of the communist past –, this trend has not been reversed but continues today.

Member decline is not ubiquitous though. The dark picture painted above masks differences in membership developments between workplaces, occupations and industries, and thus between trade unions. It also does not rule out that individual (smaller) unions may still have seen membership growth. In fact, out of the 32 European countries covered here, eight countries have seen, *on average*, a rise in trade union membership in the period 2010-2017, although the increase is close to stability in the case of Spain (+0.2%), and fairly modest in France (+2.5%). Membership growth is, on average, higher than five per cent in Luxembourg (+5.4%), Belgium (+6.7%) and Malta (+7.9%), whereas it is close to ten per cent in Norway (+9.6%) or even a bit more in Italy (+10.7%) and Iceland (+10.9%). Moreover, union membership among women has (slightly) increased in most countries, linked to the proliferation of employment in personal, public

7. For a recent detailed overview on union membership in Germany, see Hassel and Schroeder (2018).

and social services (see Visser 2019b). Estonia, Lithuania, Hungary, Sweden and Turkey are exceptions, with women's share in unions declining here – see Table 4 in Appendix II.

Figure 4. Average union membership level (2000s) and its average change (2010-2017) in Europe (27 countries)



Source: Visser (2019a).

Figure 4 provides further details on the extent of the fall in trade union membership in most countries covered here. The figure compares the average level of membership on a logarithmic scale in the 2000s (horizontal axis) with the average percental change in the period 2010-2017, or the latest data available (vertical axis). The annual rate of decline is highest in Slovenia (-7.6%), followed by two other CEE countries, Estonia (-6.0%) and Slovakia (-4.9%). The rate is also close to five percent in Portugal (-4.8%). The outflow of members was also quite fast in Croatia (-4.0%), Czechia (-3.6%), Spain (-3.6%), Latvia (-3.3%), Lithuania (-3.2%), Cyprus (-2.6%), Ireland (-2.5%), Bulgaria (-2.2%), and the Netherlands (-2.1%) in the period 2010-2017 – all countries with a rate of decline above two percent. Though no full figures exist for the period 2010-2017, Croatia, Greece and Hungary probably also belong to this group of countries. Spain is the only large country within this group. The pace of decline *tends* thus to be stronger in smaller countries, i.e. with a membership under one million members. With its medium-sized population, the Netherlands is another exception to this observation, with an average membership of about 1.5 million in the period 2000-2010 but with an average annual decline above two per cent. Other small-country exceptions are Finland (-1.2%), Austria (-0.2%) and Switzerland (-0.4%), all with a modest decrease, and Luxembourg (+1.4%), Malta (+2.4%) and Iceland (+2.8%) with an annual member increase in most recent years.

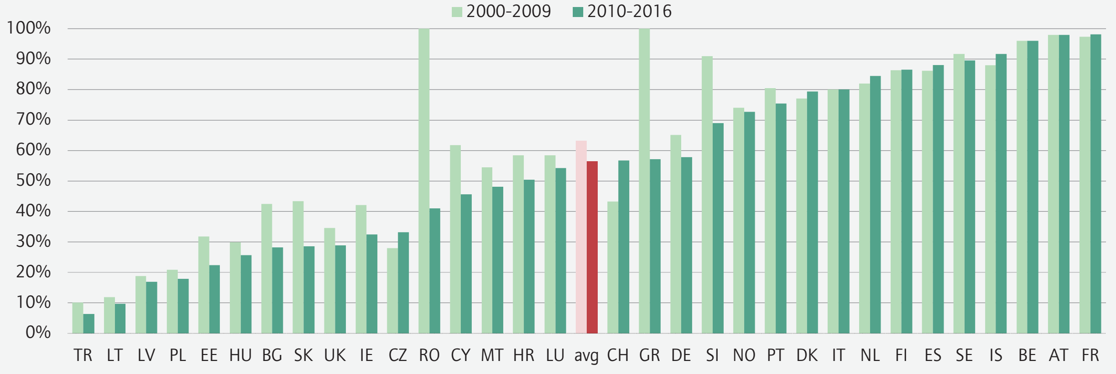
Five other countries, among them three Nordic countries, have seen membership increase: Denmark (+0.1%), Italy (+0.3%), Norway (+0.6%), Sweden (+1.1%) and Turkey (+3.8%). The average zero growth in Belgium in the period 2010-2017 points to the fact that the decline in the most recent years outnumbers the minor membership growth in the early 2010s (Vandaele 2017) – see also Appendix III. Belgian trade unions in particular are recruiting members among 'working-class employees' and less so among the 'middle- and upper-class employees' (Strøby Jensen 2019), pointing to the influence of the Ghent system that encourages workers with relatively high unemployment risks, or with lower educational attainment, to become and remain a union member (Van Rie *et al.* 2011). Apart from Spain, with its relatively high rate of decline, the rate of change has been rather small in other countries with membership levels exceeding 2 million. The increases for Italy and Sweden have already been mentioned, whereas the rates for Germany (-0.3%), Poland (-1.0%) and the UK (-1.0%) are declining; France probably belongs to this group of small change with possibly a positive rate in the period 2010-2016. In Romania, another country with more than 2 million members in the period 2000-2009, the pace of decline, similar to other CEE countries, seems rather drastic.

Combining the results of Figures 3 and 4, it becomes clear that real membership growth – i.e. average membership in the period 2010-2017 is higher than the previous decade – has only occurred in five countries: Italy, Luxembourg and Malta, Norway and Iceland. France and Belgium are marked by relative stability, with membership decline of recent nature in case of Belgium. The Belgian decline in union membership could only be partly attributed to a strengthening of the unemployment regulation since 2013, indirectly affecting the 'quasi-Ghent system', as membership decline set in some years earlier (Vandaele 2017). Denmark, Turkey and Sweden are countries with recent growth, though not enough to compensate for previous losses. Furthermore, membership grew in Cyprus, Greece, Ireland, Portugal, Romania and Spain in the period 2000-2009, but has since decreased. A large group of sixteen countries has seen membership decline in the entire period. While this decline accelerated in Finland, Hungary, Slovenia, Switzerland and the UK in the recent period, it slowed down in Austria, Bulgaria, Croatia, Czechia, Germany, Latvia, Lithuania, the Netherlands, Poland and Slovakia. In Estonia, it stayed at the same average rate of -6.0 per cent in both periods.

2. Trends in union density: an even darker picture

While data on union membership corresponds to the number of wage- and salary-earners belonging to a union, trade union density expresses its proportion. This ratio is likely overestimated, however, as the denominator does not include all workers 'relevant' for unions, such as the solo self-employed and workers in the 'shadow economy' (see also Visser 2019b). Union density is a general indicator for comparing the associational power of workers across industries or countries (Ebbinghaus and Visser 1999; Visser 2006): the ratio 'weighs the totality of constraints imposed by joint regulation on managerial prerogative' (Vernon 2006: 203). It is an incomplete measure, however. Union density provides little information about internal member dynamics within unions, i.e. the relative representation of particular groups within unions, and their relative power, i.e. in comparison to their size in the labour market (Koçer 2018). Also, in addition to workers' associational power, expressed by union density, other power resources and the unions' capabilities to use them (see Lévesque and Murray 2010) should certainly be considered when assessing workers' power *vis-à-vis* employers' power. Last but not least, the understanding of trade union membership matters. France for instance, with its particular low union density, illustrates that trade union power can also be based on unions' mobilisation capacity (Sullivan 2009), with such a 'unionism of activists' also somehow holding true in other Southern European countries (Gumbrell-McCormick and Hyman 2013; Visser 2011). Likewise, the legitimacy of trade unions in Spain is achieved via union elections for workplace representatives and works council representatives in companies – it can thus be characterised a "voters' trade unionism' rather than a 'members' trade unionism" (Martínez Lucio 2017: 91). By contrast, countries with a high number of union members do not necessarily reflect a vibrant labour movement, as the relative proportion of 'passive members', i.e. those members with a very low union participation, could be high, particularly in countries with a Ghent system (Bergene and Mamelund 2015; Vandaele 2017).

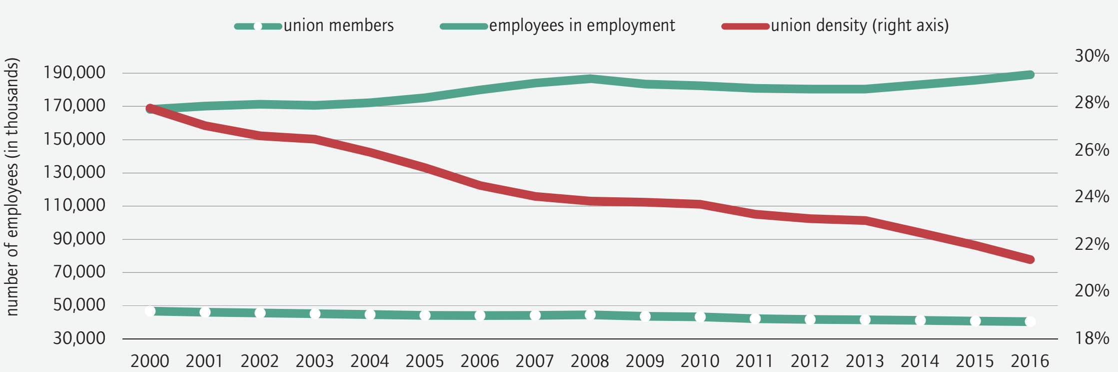
Figure 5. Collective bargaining coverage in Europe (32 countries), 2000s and 2010-2016



Source: Visser (2019a).

An alternative indicator for measuring the possible influence of trade unions and their effectiveness in labour markets is collective bargaining coverage, although its level is mainly driven by the associational rate of employers' organisations (Hayter and Visser 2018). Figure 5 compares the average shares of wage- and salary-earners covered by a collective agreement in the periods 2000-2009 and 2010-2016. Countries with a high coverage, associated with multi-employer bargaining, in general show stability, except for Slovenia (-22%), Greece (-43%) and Romania (-59%), all of which have seen a drastic decline in coverage due to legislative changes. Bargaining coverage has only declined slightly in most countries with medium to low coverage marked by either less dominant systems of multi-employer bargaining or single-employer bargaining. Exceptions to this pattern are Bulgaria (-14%), Cyprus (-16%), Estonia (-9%), Ireland (-10%) and Slovakia (-15%), countries featuring a considerable drop of some ten percentage points or more. Bargaining coverage increased a bit, on average, in France (+1%), Czechia (+5%), Denmark (+2%), Iceland (+4%), Spain (+2%), and to a greater extent in Switzerland (+13%).

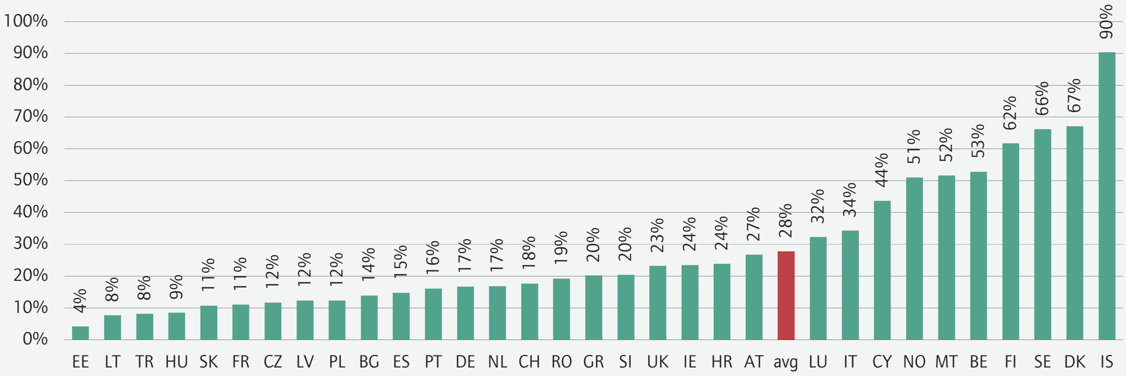
Figure 6. Weighted union density in Europe (based on 32 countries), 2000-2016



Source: Visser (2019a).

Figure 6, with adjusted vertical axes, plots the annual development of the *weighted average* in trade union density in Europe since 2000, showing the slow but steady de-unionisation in Europe (right-hand axis). While, on average, more than one in four wage-earners were unionised in Europe in 2000, this proportion had declined to 21.4 per cent in 2016, a drop of 6.4 percentage points. The continual decline in union density is not only the result of falling union membership, but also of higher labour market participation (left-hand axes). Thus, while trade unions in *some* countries have indeed still been able to recruit new members, it seems that membership gains have not kept pace with this increasing participation in *most* countries. The rate of decline in both periods is almost equal. The 2000s were marked by a total decrease in membership of -7.0 per cent, rising to -7.8 per cent in the latter period (until 2016). Splitting the years into a period before and a period after the crisis, however, yields an average decrease of -0.6 per cent in the period 2000-2008, doubling to -1.2 per cent in the period 2009-2016.

Figure 7. Union density in 32 European countries, 2017 (or latest year available)

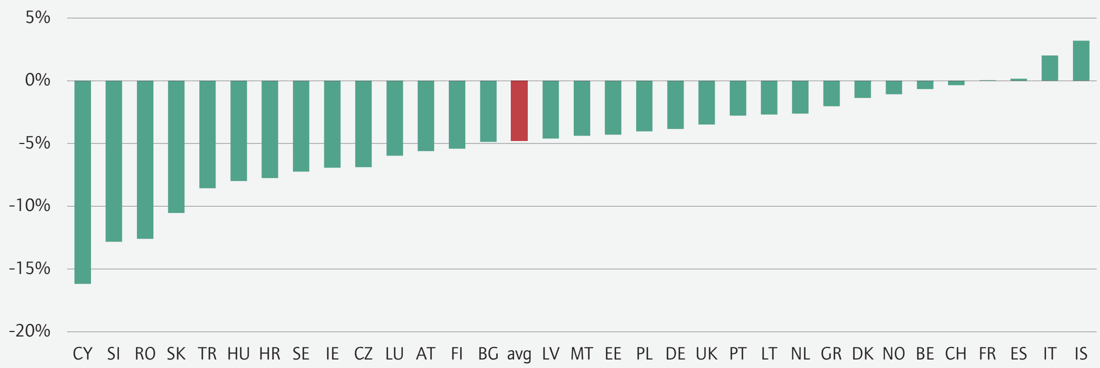


Source: Visser (2019a).

The general development in trade union density hides the considerable cross-country variation in the aggregate unionisation rates, as shown in Figure 7. Union density ranges from a very low 4.2 per cent in Estonia (in 2017) to 90.4 per cent in Iceland (in 2016) (though there is a gap of more than twenty percentage points between Iceland and the next countries). Somewhat more than two-thirds of wage-earners are unionised in Denmark and Sweden, dropping to 61.7 per cent in Finland. Excluding the so-called 'yellow unions' from the analysis would imply, however, that union density is a lot lower (about ten percentage points) in Denmark (Ibsen *et al.* 2013). Nordic countries, including Norway, continue to top the 'unionisation league', showing an encompassing trade union membership and recording the highest union density rates in Europe due largely to, as discussed in the introduction of this report, a relatively benevolent institutional setting. Moving down the league table, Norwegian, Belgian and Maltese trade unions are also able to attract more than half of the wage- and salary-earning population into union membership. While trade union density stands at 43.7 per cent in Cyprus, Luxembourg and Italy are the only two other countries with a density close to or higher than one third of wage- and salary-earners.

All other 22 European countries have a density below the European average. About one in four wage-earners are unionised in Austria. Yet, in countries with a similar industrial relations system, this ratio is nearer to 15 per cent – as seen in Switzerland, the Netherlands and Germany. Union density is similar in Ireland and the UK (23.5 and 23.2 per cent, respectively). Greece has a density above twenty per cent, some five percentage points higher than two other South European countries, Portugal and Spain. As 'labour-friendly' labour market institutions are generally lacking in CEE countries, it comes as no surprise that most of them are at the bottom of the 'unionisation league', with a trade union density below 15 per cent. This backs 'the notion that to some degree European integration has served as a neoliberal project to advance the interest of capitalists' (Vachon *et al.* 2016: 13); Croatia, Slovenia and Romania are the only exceptions with a union density above twenty per cent, although density is plummeting as we will see.

Figure 8. Change in union density in Europe (32 countries), 2000s vs. 2010-2017



Source: Visser (2019a).

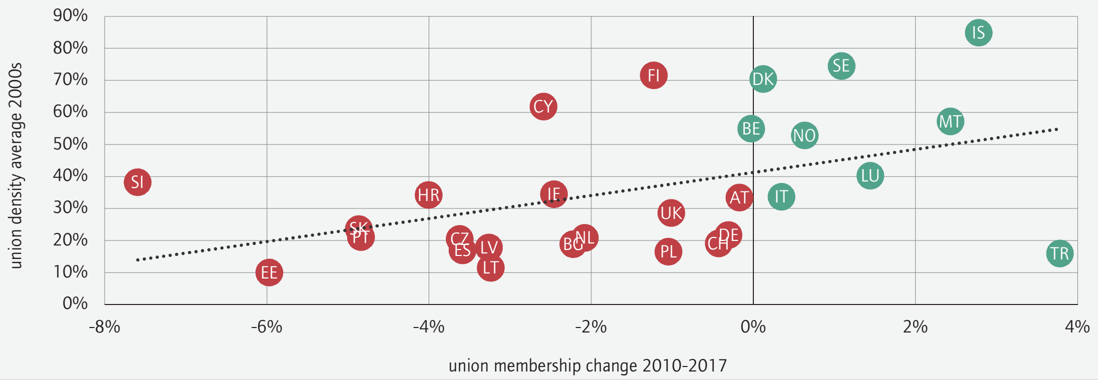
Figure 8 provides an overview of the differences between the average levels in trade union density in the 2000s and the period 2010-2017, or the latest year available. Comparing these two periods, it is clear that density has declined in the majority of countries. There are just four exceptions. Alongside Iceland (+3.2%) with its very high level of union density, Italy (2.0%) shows a slight but noteworthy increase (for details, see Regalia and Regini 2018), whereas Spain (0.2%) and France (0.1%) show stability, albeit at a much lower level of union density. However, the Spanish stability is not the result of union growth but of membership falling at a slower rate than employment. Swiss (-0.4%) and Belgian (-0.7%) unions have managed to keep their membership levels almost in line with the rise in the number of wage- and salary-earners. The fall in trade union density is also rather limited in Norway (-1.1%) and Denmark (-1.4%) – two countries with a high union density. In the case of Denmark, it should be recalled, however, that the 'yellow unions' are disturbing the picture.

Four countries have seen a decline in density below three per cent: Greece (-2.0%), the Netherlands (-2.6%), Lithuania (-2.7%) and Portugal (-2.8%). The declines in the UK (-3.5%) and Germany (-3.8%) are similar, whereas the drops are greater in Austria (-5.6%), Luxembourg (-6.0%) and Ireland (-6.9%). Apart from Lithuania, de-unionisation is widespread and (very) strong in all CEE countries: Poland (-4.0%), Estonia (-4.3%), Latvia (-4.6%), Bulgaria (-4.9%), Czechia (-6.9%), Croatia (-7.8%), Hungary (-8.0%), Slovakia (-10.5%), Romania (-12.8%) and Slovenia (-12.8%). Thus, even a stabilisation of union density at low levels seems not to hold true for the CEE countries. Yet even Finland (-5.4%) and

Sweden (-7.2%), two countries with a high union density, have seen quite strong falls. The same applies to Turkey, this time a country with a low union density (-8.6%). Finally, whereas de-unionisation is quite pronounced in Malta (-4.4%), its neighbouring Mediterranean island, Cyprus (-16.2%), has seen the largest drop in union density in the period observed.

Although data is inconsistent for most countries, looking at unionisation by gender (see Table 5 in Appendix II), the most frequent pattern is that de-unionisation is more pronounced among men in fifteen out of 29 countries for which data is available. This is the case in Austria, Cyprus, Czechia, Denmark, France, Germany, Ireland, Finland, the Netherlands, Poland, Portugal, Slovakia, Sweden, Turkey and the UK. De-unionisation for men and women also holds true for Estonia, Greece, Hungary, Latvia, Lithuania, Luxembourg and Slovenia but is even stronger among women. Union density is declining among men in Belgium, Norway and Switzerland, while it is stable or increasing among women. The opposite is true in Malta: unionisation is increasing among men but declining among women. Finally, unionisation is increasing among both men and women in Iceland, Italy and Spain, with a higher increase among men.

Figure 9. Union density level in the 2000s and member change in 2010-2017



Source: Visser (2019a).

Finally, Figure 9 compares the level of trade union density in the 2000s (vertical axis) with the rate of change in union membership (horizontal axis) in the next period for 28 countries.[8] It appears that countries with a moderate to high union density have been able either to limit membership decline, as is the case for Finland, or to increase membership, as in Iceland, Sweden, Denmark, Malta, Belgium, Norway and Luxembourg. The only exception to this pattern is Cyprus, with a moderate density level in the 2000s, but with an average rate of decline in union membership of 2.6 per cent in the most recent period. Furthermore, six countries with union density equal to or below 40 per cent in the first period have either seen a small average increase in trade union membership in the period 2010-2017 (Italy), or a relatively limited decline (Austria, Germany, Poland, Switzerland and the UK).

8. This exercise again excludes France, Greece, Hungary and Romania.

Croatia, Czechia, Estonia, Ireland, Latvia, Lithuania, the Netherlands, Portugal, Slovakia, Slovenia, Spain and Turkey are all countries with a moderate to low union density in the 2000s, and which found themselves confronted with a severe or sharp decline in union membership in the subsequent period. Greece, Hungary and Romania can likely be added to this group, whereas trade unions in France have probably managed to maintain their membership levels despite the low union density. In any case, apart from the six exceptions mentioned, in all countries with a moderate to low union density, union membership is declining faster than in countries with a high density. Further contributing to this bleak picture is the growing percentage of wage- and salary-earners who have never become a trade union member. This is a tendency common to all European countries (Kirmanoğlu and Başlevent 2012: 695), as seen in Germany (Schnabel and Wagner 2006) and the UK (Booth *et al.* 2010a). Although the employment shift from the traditionally highly unionised manufacturing sector to the less unionised private services sector has contributed to the rise in never-membership, this is not the whole story. De-unionisation would have occurred even in the absence of such a structural employment shift in the labour market (Ebbinghaus and Visser 1999). Put differently, intra-industrial changes, linked to changes in the characteristics of employment, must also be taken into account for explaining de-unionisation.

Remarkably, despite the cross-national differences in unionisation levels and rates of change, there have been very few changes to the 'unionisation league' in Europe (see also Bryson *et al.* 2011). Thus, a rank correlation test based on the averages in union density demonstrates that the relative position of countries in the recent period 2010-2016/7 has hardly changed compared to the previous decade ($r_s(32) = 0.96$, $p = 0.00$). Indeed, while the simple average in trade union density shows a declining trend, the standard deviation between the countries (those with a full data set) has remained stable, i.e. between 20 and 22 per cent. Put differently, the least unionised countries in the 2000s stayed more or less at the bottom of the league in the most recent period, while countries with a medium and high average level maintained their position in the middle or at the top, irrespective of the developments in unionisation. Thus, despite broad, common societal trends (see Visser 2019b), union density remains divergent in Europe.[9] This not only reflects the influence of 'labour-friendly' labour market institutions, as particularly expressed in the Nordic and 'Ghent system' countries, but also points to different conceptual understandings of union membership, as seen in southern European countries.

9. These trends include ongoing technological and organisational change, deindustrialisation and offshoring, the expansion of (low-paid) private services and the advent of the platform economy; the increase of non-standard forms of employment and precariousness; privatisation, austerity policies and contracting public employment; the financialisation of the economy (see Kollmeyer and Peters 2018; Grady and Simms 2018); and employers' union avoidance and busting tactics and the dominance of neoliberal thinking infusing anti-union regulation.

Table 1 **Average collective bargaining coverage and union density, 2000s and 2010-2016**

	Trade union density		Collective bargaining coverage		Difference	
	2000-2009	2010-2016	2000-2009	2010-2016	2000-2009	2010-2016
Nordic and 'Ghent system' countries						
Belgium	55%	54%	96%	96%	-41%	-42%
Denmark	70%	69%	77%	79%	-7%	-10%
Finland	71%	66%	86%	87%	-15%	-20%
Iceland	85%	88%	88%	92%	-3%	-4%
Norway	53%	52%	74%	73%	-21%	-21%
Sweden	75%	67%	92%	90%	-17%	-22%
Liberal-west European countries						
Cyprus	62%	46%	62%	46%	0%	0%
Ireland	34%	27%	42%	32%	-8%	-5%
Malta	57%	53%	55%	48%	+3%	+5%
UK	29%	25%	35%	29%	-6%	-4%
Central European countries						
Austria	33%	28%	98%	98%	-65%	-70%
Germany	22%	18%	65%	58%	-43%	-40%
Luxembourg	40%	34%	58%	54%	-18%	-20%
Netherlands	21%	18%	82%	84%	-61%	-66%
Switzerland	19%	19%	43%	57%	-24%	-38%
Southern European countries						
France	11%	11%	97%	98%	-86%	-87%
Greece	24%	22%	100%	57%	-76%	-35%
Italy	34%	36%	80%	80%	-46%	-44%
Portugal	21%	18%	80%	75%	-59%	-57%
Spain	17%	17%	86%	87%	-69%	-71%
Eastern European countries						
Bulgaria	19%	14%	42%	28%	-24%	-14%
Croatia	34%	26%	58%	50%	-24%	-24%
Czechia	20%	14%	28%	33%	-7%	-20%
Estonia	10%	6%	32%	22%	-22%	-17%
Hungary	18%	10%	30%	26%	-12%	-16%
Latvia	18%	13%	19%	17%	-1%	-4%
Lithuania	11%	9%	12%	10%	-1%	-1%
Poland	16%	12%	21%	17%	-4%	-5%
Romania	33%	21%	100%	41%	-67%	-20%
Slovakia	24%	13%	43%	29%	-20%	-16%
Slovenia	38%	25%	91%	69%	-53%	-44%
Other countries						
Turkey	16%	7%	10%	6%	+6%	+1%

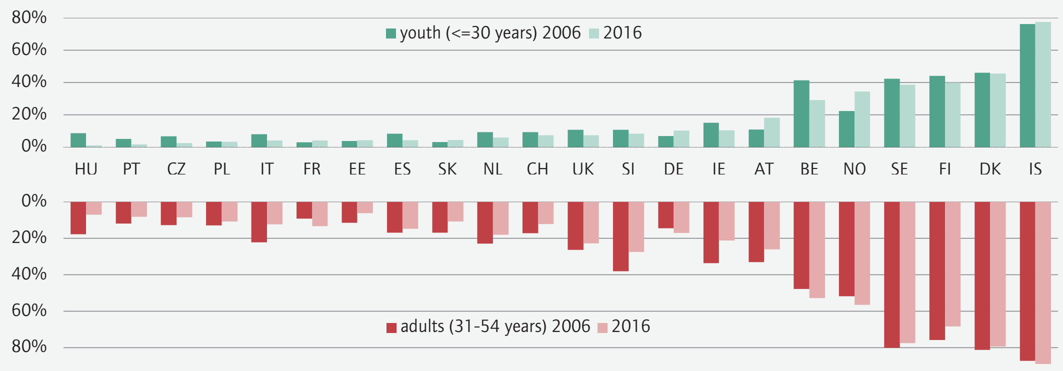
Note: Rounding errors possible.
Source: Visser (2019a).

Based on shared political-legal and other characteristics within their respective industrial relations systems, countries can be grouped together (Gumbrell-McCormick and Hyman 2013; Visser 2011). Table 1 shows such country groupings, with the averages in trade union density and collective bargaining coverage in the periods 2000-2009 and 2010-2016. Thus, Nordic and 'Ghent system' countries all share high rates of union density and bargaining coverage, with both indicators relatively stable and close to each other (except Belgium). Liberal-west European countries are characterised by voluntarist industrial relations systems, with changes in union density mirrored in bargaining coverage. By contrast, the gap between union density and bargaining coverage is substantial in Central European countries, except for Luxembourg. This discrepancy has mostly widened, with density decreasing and coverage remaining stable. The gap between union density and bargaining coverage is even more evident in Southern European countries, with density and coverage being fairly stable at low and high levels, respectively, except for Greece where bargaining coverage has dropped substantially due to legal changes hampering the extension of collective agreements. CEE countries stand out on account of the continued decline in both union density and coverage, with the gap between those two indicators diminishing, although Czechia is an exception. Finally, trade union density and bargaining coverage remain at a very low level in Turkey, with coverage slightly higher than density.

3. Early unionisation is key, but unions are 'greying' and predictions bleak

The earlier-mentioned rise of 'never-membership' can be considered a 'demographic time bomb' for unions, with priority needing to be given to organising young workers. Hence, this section focuses on membership developments and shifts within trade unions across Europe regarding age structure. In contrast to the previous two sections, 'passive' members on the labour market like students, the unemployed or pensioners will be included in the analysis in this section, as they can influence union decision-making.[10] Figure 10 compares the unionisation rates among 'youth' and 'adults' for 22 countries in 2006 and 2016, although the data is only illustrative for those countries with a low unionisation rate.[11] Trade union members aged 30 or younger are labelled 'young' and members between 31 and 54 'adult'.[12] Three conclusions can be drawn from this figure.

Figure 10. Unionisation rates among youth and adults in Europe (22 countries), 2006 and 2016



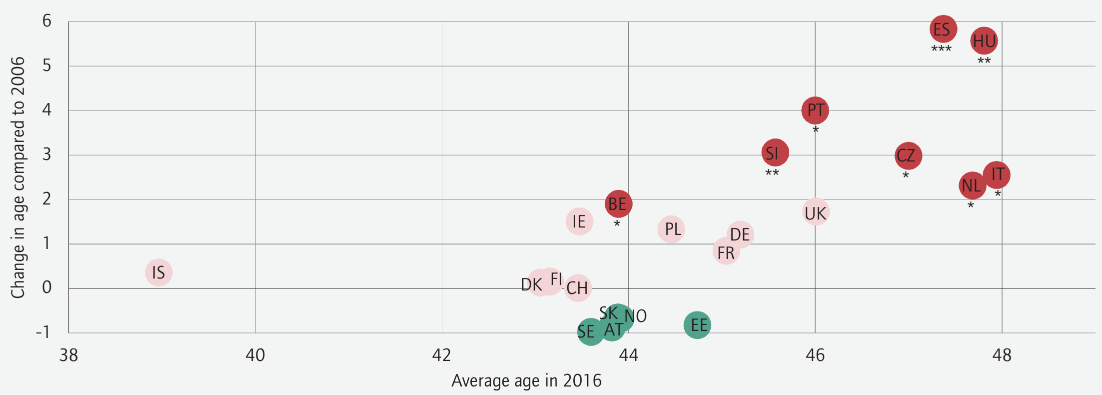
Note: 2004 versus 2012 for Slovakia; 2004 versus 2014 for Denmark; 2004 versus 2016 for Czechia, Iceland and Italy.
Source: ESS (2006 and 2016).

First, both youth and adult unionisation rates have fallen in most, but not all, countries, with sometimes a relatively stronger decrease in youth unionisation. In other words, over the past ten years in most European countries considered here, fewer young people have joined a union. The fall in youth unionisation

10. Obviously, member categories or the average age in each country shift slightly if only active union members are included in the count; however, country trends over time remain.
11. This analysis could not be undertaken for Bulgaria, Croatia, Cyprus, Greece, Latvia, Lithuania, Luxembourg, Malta, Romania, and Turkey.
12. Trade unions in Europe generally use a broader definition by setting the maximum age for 'youth' to 35 (Vandaele 2012: 208).

is especially conspicuous in Belgium, a country in which adult unionisation looks to have improved. Youth unionisation seems to have only increased in Austria, Germany and Norway. Second, country differences in youth and adult unionisation are generally persistent over time. Thus, while the country ranking is very stable regarding union density in general (see Section 2), this also holds true for the youth unionisation rates between 2006 and 2016 ($r_s(22) = 0.86$, $p = 0.00$). This points to distinct patterns in the school-to-work transition and the different degrees of trade union involvement in this transition (Vandaele 2018b). Finally, and importantly, the mirroring image in Figure 10 illustrates the strong self-perpetuating tendencies of early trade union membership, underlining that early unionisation is vital. Thus, while the typical union member is middle-aged, the first encounter with trade unions is very likely to happen when a worker is still young (Booth *et al.* 2010a: 48). Evidence from, for instance, Denmark (Toubøl and Strøby Jensen 2014: 150) and the Netherlands (Visser 2002: 416) suggests that it is more likely for a worker to join a union when she or he is young and entering the labour market than later on. Put differently, there are many 'first-timers' but far fewer 'late bloomers' in trade unions (Booth *et al.* 2010b). This essentially suggests that the window of opportunity for unions to organise workers becomes decidedly smaller, the older they get (Budd 2010), although it is somehow encouraging that young workers seem 'sensitive to reputational effects even at low levels of workplace union density' (Ibsen *et al.* 2017: 10).

Figure 11. Average age of union members in Europe (22 countries) in 2016 versus its change compared to 2006



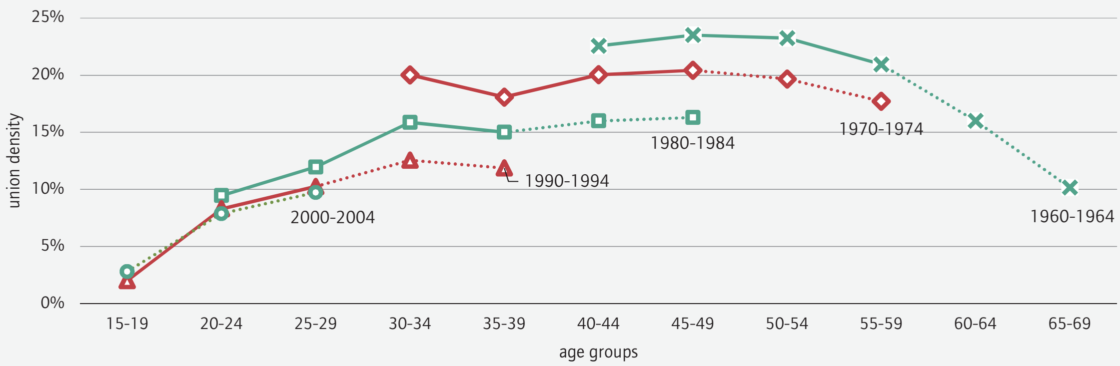
Note: 2004 versus 2012 for Slovakia; 2004 versus 2014 for Denmark; 2004 versus 2016 for Czechia, Iceland and Italy; *p<0.05; **p<0.01; ***p<0.00.
Source: ESS (2006 and 2016).

Since, by and large, many trade unions in most countries in Europe are struggling to organise young people or, at least, cannot keep membership developments in line with growing employment rates, it can be expected that the average age of union members is on the rise. This is exactly what Figure 11 illustrates. It shows the average age of a trade union member in 2016 (horizontal axis) and to what extent this has changed since 2006 (vertical axis) for 22 countries.[13] Average age increased *significantly* in eight countries between 2006 and 2016: Belgium, Czechia, Hungary, Italy, the Netherlands, Portugal, Slovenia and Spain. Importantly, this

13. See footnote 11.

very likely implies that the same cohort effect applies to trade union activists and representatives in many industries in these countries.[14] A slightly higher average age was noted in eight other countries, although the rise was not significant. The six other countries experienced no change or a slight decline in average age, although again not significant. Apart from a declining inflow of young people, other factors might also contribute to the 'greying' of trade unions, such as declining birth rates, young people's later labour market entrance in the wake of higher tertiary education rates, and youth emigration. The average age of the trade union members is consistently older than the average of the wage- and salary-earners in general. While this gap widened significantly in the Netherlands in the period 2002-2016, such a trend is less clear for other countries, mainly due to a lack of data for the whole period. Nevertheless, in general, the average age of a trade union member lies somewhere between 43 and 48 years in Europe except in Iceland. It should, however, be noted that, in reality, the average age will be (slightly) higher, as the maximum age for calculating the average has been set to 64 years.

Figure 12. Weighted union density in Europe (23 countries) by age cohort, actual and predicted



Source: ESS (2004, 2008, 2012 and 2016).

Providing a touch of flavour to the generational challenge, Figure 12 shows the actual and predicted trends in the weighted average of trade union density, based on twenty-three countries, per age cohort. Those countries are the high union density countries Belgium, Denmark, Finland, Norway and Sweden, as well as Austria, Czechia, Estonia, France, Germany, Hungary, Iceland, Ireland, Italy, Lithuania, the Netherlands, Poland, Portugal, Slovenia, Slovakia, Spain, Switzerland, and the UK – i.e. countries from all five country groups. Data is missing, however, for some of those countries, influencing the actual and predicted patterns.[15] Needless to say, the weighted average in union density hides country differences, meaning that the extent of the generational challenge differs from country to country, and between occupations and industries within countries. Five age cohorts are depicted in Figure 12. The actual dynamics in weighted average trade union density run over a fifteen-year period for the three oldest cohorts. Projections on union density

14. On the importance of union activists for trade union revitalisation, see e.g. Uetricht and Eidlin (2019).
15. This is the case for Lithuania in 2004, Iceland and Italy in 2008, Austria and Spain in 2012, Slovakia and Denmark in 2016.

developments are made for the next ten years. The projections, depicted by the dotted lines, are based on the naïve, optimistic belief that each cohort will simply follow the pattern of the previous age cohort.[16]

The representation gap in unionisation between younger and older workers is not new. Yet it is clear from the figure that every age cohort has a lower union density than its predecessor, although this is less pronounced among the youngest cohort. The notion that low unionisation rates among younger age cohorts are attributable solely to their later labour market entrance due to more time spent in education and will subsequently rise to those of previous cohorts is not supported here. Instead, the general pattern is that highly unionised age cohorts are leaving or retiring from the labour market, being replaced by less unionised cohorts. Simply to replace members exiting the labour market, and thus likely to leave a union, recruitment thus becomes a permanent task. In other words, strong gains in union membership are even needed to keep unionisation levels up to those of previous cohorts. For instance, while union density stood at 23 per cent for 40- to 44-year-olds in 2004, i.e. for members born in the early 1960s, this density had declined about 3 percentage points eight years later for those born between 1970-1974, while it is predicted that density will stand at 16 percent in 2020 for the cohort born in the early 1980s. This lower unionisation rate will have a long-lasting impact as unionisation typically takes place at a relatively young age.

Finally, union density seems to develop in an inverse U-shape pattern in each age cohort, with density low at the beginning of working careers and declining at the end of careers (see also Blanchflower 2017). While the role of older, longstanding union members in reinvigorating unions will probably be relatively limited compared to younger cohorts (though not completely neglectable), their retention represents a further challenge. In general, trade unions should not completely lose sight of their existing (younger) members as a source of potential organisational change (Smith *et al.* 2019). At the same time, as middle-aged workers currently dominate union membership, the median voter theorem would suggest that their policy preferences dominate trade union strategies (Ebbinghaus 2006; Koçer 2018). However, it seems that there is growing awareness within unions of the need to tackle the generation gap in unionisation (Tapia and Turner 2018; Vandaele 2018a). Indeed, there are ample examples of 'good practices' principally targeting young people (see, for instance, Lorenzini 2016; Unite 2014), meaning that there is no need for defeatism.

16. For a similar exercise in the UK context, see Tomlinson and Kelly (2016).

4. Possible union responses to revenue losses, and some attitudinal hope

Members bring trade unions external relevance, organisational sustainability and revenue. The latter is needed for instance for fulfilling international and European obligations; for paying union leaders and full-time officers; for office space and maintaining real estate; for training courses and educational programmes for trade union representatives and activists; for union administration, and for offering members individual and collective benefits and services via collective bargaining and lobbying; for launching union actions and campaigns; and for – where available – filling strike funds and paying out strike benefits. Even so, revenue losses due to falls in membership do not automatically or necessarily incentivise unions to reorient resources and to prioritise organising strategies and the recruitment of new members. Much will depend on a trade union's own identity and framing, its conception of membership and its degree of institutional embeddedness in the labour market and welfare state regime. Lobbying can provide an alternative, less risky source of political influence than relying on mobilising and organising members (Heery and Adler 2004; McAlevey 2016). The socio-economic context and employers' behaviour are further explanations for cross-national differences in union responses (Frege and Kelly 2003).

Table 2 **Possible union responses towards revenue losses**

Member-focused responses
– Increasing union dues
– Retention-centred strategies
– Recruitment-centred strategies
Organisational-focused responses
– Cost-saving through internal restructuring
State or employer-focused responses
– In search of additional or other income
– Augmenting 'union security'

Source: author's own compilation.

There are at least six – not mutually exclusive – responses conceivable *for compensating for a drop in revenues*, each bringing with it its own potential opportunities and internal tensions and resistance. Table 2 provides an overview of those responses, either being member-, organisational or state or employer focused. Some of these responses could be considered rather 'myopic', hardly leading to union expansion in workplaces, occupations and industries in which unions are currently underrepresented. They tend to ignore or postpone an in-depth tackling of the membership and generational challenge, and a self-reflecting rethinking of twenty-first-century trade unionism. Indeed, union responses to declining revenues open up a much larger debate on union renewal and revitalisation – though not the principal focus here.

A first response is simply to maintain revenues by increasing union dues for existing and future members. This would not only be unpopular among existing members, but also increases the cost of joining a union, especially among precarious workers on unstable or low incomes. Indeed, for that category of workers exactly the opposite might be more appropriate. A reduced membership due or free membership would enable them to 'experience' membership, since becoming a union member requires some degree of prior knowledge, given that most union-provided benefits are rather unclear for non-union members (Gomez and Gunderson 2004). A second response is to keep union dues at the same level and to institute cost-saving and internal restructuring measures. This can be achieved for instance by offering full-time officers' early retirement, closing down union offices and/or through union mergers which likely come along with scale effects. While mergers do not necessarily have a negative impact on the level of union services and their perceived quality (Baraldi *et al.* 2010; Behrens and Pekarek 2012; Navrbjerg and Larsen 2018), it is questionable whether they go hand in hand with union revitalisation. In the Danish context, for instance, it has been found that 'shop stewards belonging to unions merged through absorption are less likely to contact their union about organising activities compared with non-merged unions and unions merged through amalgamation' (Navrbjerg and Larsen 2018: 380-381).

A third union response develops strategies for retaining existing members in an effort to maintain current revenues. Such a retention-centred strategy makes particular sense for unions operating in occupations and industries with predominantly non-standard forms of employment and a high union membership turnover (Oesch 2012). A fourth union response is to attempt to increase revenue from other sources like employers[17] and the state, or through tapping project-based funds linked to international union cooperation or European initiatives. While the latter might involve capacity-building initiatives and an orientation towards member recruitment and organising, it remains an empirical question whether the 'lessons learned' from a probably isolated project will be incorporated into general union strategies after it is finished. Even so, the importance of membership dues is thus relatively dependent on non-member financial resources. Put differently, if unions rely less on membership dues for their financial and organisational sustainability, thereby fostering a 'logic of influence', then the incentives to prioritise a 'logic of membership' and shift resources towards member recruitment and organising strategies are lower (see also Pernicka and Stern 2011).

A fifth response involves political lobbying to bolster 'union security' (Clegg 1976) by lowering or removing regulatory obstacles hindering member recruitment and organising. In a similar vein, trade unions are attempting to avoid free-riding in cases where collective agreements are extended to all workers, irrespective

17. The main employers' association in the Netherlands is even planning to actively promote union membership in companies in order to maintain support for collective agreements and the social partnership model (Het Financieële Dagblad, 1 October 2018).

of union membership. Unions and academics have no lack of (pragmatic) ideas for supporting and promoting union membership, ranging from paying out bonuses solely to union members or entitling them to longer holidays, in case of Germany[18], to making union membership the 'default option' in workplaces where unions already have members or a collective agreement in the UK context (with an opt-out option after some time) (Harcourt *et al.* 2019). Some of these union responses enhancing union security might be seen as leaning too much towards existing members, like making union membership dues tax-deductible, while other envisaged responses are promising but unlikely to be a 'quick fix', as they require regulatory changes dependent on a more favourable policy climate in many countries across Europe. Even so, such a lobbying response can be warranted, given the magnitude of the generational and member challenge and the unlikeliness of it being solved by the trade unions alone. Yet, even if political lobbying is successful, it does not absolve unions from their responsibilities to recruit and organise new members.

A sixth response is indeed a stronger union commitment to recruiting, and organising new members where unions already have a footprint, but also in those workplaces, occupations and industries that are (almost) union-free (e.g. Simms *et al.* 2019). This ideally involves a vast shift of resources, often seen as risky. Similarly, such a union response probably also implies a stronger union uptake of digital communication and app-based technologies and the algorithmic use of 'big data' to target and mobilise specific membership groups, although face-to-face communication remains important. Looking through a telescope lens, there is indeed some convergence in union responses in Europe, especially in the promotion of variants of US-style 'organising' (Ibsen and Tapia 2017). For instance, some unions in high-union-density countries like Denmark and Norway have increasingly gained inspiration from other unions' experiences with organising in low-density countries (e.g. Arnholtz *et al.* 2014; see also Bergene and Mamelund 2015). For their part, via the 'Baltic Organising Academy', Nordic unions are involved in transnational mutual learning processes with Baltic unions in testing organising approaches in, for instance, Estonia (Kall *et al.* 2019). Looked at through the microscope, however, carbon copies of the 'original' organising approach are rarely reproduced. The approach is instead adapted, reformulated and selectively used in a country's own industrial and national context, as seen for instance in cases in France and Germany (Thomas 2016; Niclich and Helfen 2019), Ireland (Geary and Gamwell 2019) and Poland (Czarzasty 2014; Krzywdzinski 2010).

Also, a more aggressive, confrontational organising approach may be perceived by trade unions as being at odds with their own industrial relations system. This has not however stopped some Dutch and German unions, normally oriented towards social partnership, from experimenting with new organising approaches, for example in the Dutch cleaning sector (Connolly *et al.* 2017; Knotter 2017; Niclich and Helfen 2018). Other union tactics and practices have unconsciously mimicked

18. Deutschlandfunk, „Bonus für Gewerkschaftsmitglieder", Reiner Hoffmann im Gespräch mit Stefan Heinlein, 30 April 2019. https://www.deutschlandfunk.de/dgb-chef-hoffmann-bonus-fuer-gewerkschaftsmitglieder.694.de.html?dram:article_id=447515 the organising approach in Southern Europa, and Spain in particular (Martínez Lucio 2017), demonstrating that not much is novel about the organising approach. Even so, policy transfers from the English-speaking world to continental Europe, driven by certain global union federations and European trade union federations, might entail the risk of unions losing sight of class and societal issues if the organising approach is promoted solely as a ‘toolbox of practices’ (Simms and Holgate 2010; see also Martínez Lucio *et al.* 2017). If, however, trade unions want to reduce inequality and promote high levels of employment, then addressing both class and societal issues continues to be essential (Crouch 2017).

This report is not the right place to open the debate and diagnose the conditions and requirements to make the organising approach a successful and sustainable union response to stemming the sustained decrease in union density levels; an appropriate comparative research design is therefore needed. It is worthwhile, however, to point out that – paradoxically and despite de-unionisation – trade unions are still able to rely on a growing and relatively high level of social legitimacy in Europe, especially among under-represented groups in unions like low-income workers, migrants and young people (Frangi *et al.* 2017; Gorodzeisky and Richards 2019). Indeed, it is a well-established empirical finding, at least in Western European countries and English-speaking countries in the Global North, that the disconnect between unions and young people is largely a matter of a lack of awareness of, and knowledge about, unions – but not of anti-unionism, a common understanding in public perceptions, media representations and political discourses.

Research has time and again demonstrated the presence of (critical) support for unions among young people, pointing to a frustrated or unmet demand for unionisation; only a small minority of them hold negative opinions about unions in principle (Tapia and Turner 2018). This (critical) support among young people holds true for a large range of countries across Europe (for an overview, see Vandaele 2018b). As the OECD (OECD 2019: 202) acknowledges: the ‘data do not support strong claims about young workers’ weaker interest in collective action driving the age-related membership differential’. Also, the predominantly young workers in app-based food delivery are not significantly different from their counterparts outside the platform economy, generally not holding negative union attitudes (at least in the Belgian context) (Vandaele *et al.* 2019). Rather than a deficiency of collectivist beliefs and values, there are other, more significant reasons for unions’ difficulties in engaging and organising young workers: they are predominantly employed in workplaces, occupations and industries in which the social norm of union membership is nearly absent. At the same time, many of those young workers could potentially benefit from union representation, as labour market flexibility tends to disproportionally affect them – there is a world to win for unions.

Conclusion: an urgent need for anchoring experimentalism and scaling-up

Mainstream trade unions remain mass membership organisations in Europe, with fourteen countries having near to or over one million union members. Moreover, unions are also still able to attract new members. Considerable divergence in unionisation levels remains as well, mainly the result of variations in labour-friendly labour market institutions, together with common conceptions about union membership. Yet, there is an almost continuing and unequivocal trend towards de-unionisation *at the aggregated level*, with membership fast shrinking in CEE, but also in many other countries. This trend shows that unions are having difficulties in retaining their (new) members (Waddington 2015) and failing in their efforts to ensure that membership keeps pace with – increasing – labour market participation. Stability or even a slight increase in union density should be taken with a large grain of salt, as workers' power is based not only on their associational power but also on their structural, institutional, and discursive power and capacity, all of which are 'challenged', to say the least, by both employers and political authorities. Four possible scenarios are possible with regard to the future of trade unions according to Visser (2019b, 2019c; see also Degryse 2019). Not mutually exclusive, they are all taking place at the same time, although to different degrees in different occupations, industries and countries in Europe.

The first scenario is that ageing unions are gradually resembling a funeral home. They are (slowly) heading towards extinction backed by current broad, societal trends. This would imply an almost union-free future, and the ultimate loss of the relevance of trade unions as an organised form of collective voice and representation. A second scenario emphasises the structural context of labour market dualisation, whereby trade unions might appear relatively unattractive to 'outsiders' when mainly representing the interests and needs of 'insiders'. In this scenario, unions hold on to their strongholds, particularly in the public sector, and are largely absent in those occupations and industries marked by non-standard forms of employment. Union responses to processes of labour market segmentation and fragmentation are, however, much dependent on their governance structures and strategies towards promoting inclusive solidarity and on labour market institutions – especially within the realm of collective bargaining – promoting such strategies (Doellgast *et al.* 2018). A third scenario is that the current forms of unionism will be substituted by other types of collective voice and representation, either based on legislation or promoted by employers' initiatives, or a result of grassroot actions. The effectiveness and sustainability of those alternatives remains to be seen, however. Yet, an interesting development is taking place in the platform economy, where grassroot initiatives co-exist with longstanding trade unions, with each of them having their own logic of member representation (Vandaele 2018a).

The last scenario highlights union agency: as 'learning organisations', trade unions are capable of 're-empowerment', 'renewal' or 'revitalisation' through developing innovative strategies or rediscovering old ones (Hyman 2007). This means that current unions have the potential to reverse current membership trends and remain a countervailing power in both the labour market and society. Indeed, union agency, together with coalitional support from, for instance, community-based organisations, can make a difference, even in very adverse circumstances. The uptake of 'democratic experimentalism' (Murray 2017) by unions seems, however, to be a prerequisite for going beyond the management of union decline, inspired by the organising approach. Examples of creative network-based mobilising and organising in the platform economy might inspire trade unions to engage more with such democratic experimentalism. The continuing de-unionisation trend makes it necessary for unions to turn successful small-scale, local initiatives into large-scale revitalisation efforts, whereby those workplaces, occupations and industries that are growing in employment and where trade unions are needed most need to be prioritised. Apart from a broad strategic vision on the future of trade unions, including their role in a 'just transition', a vast shift in power resources is required to overcome representation gaps in union membership and to revitalise the union movement in general.

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All links were checked on 2 May 2019.

Appendix I
The ICTWSS and ESS as sources

Table 3 **The availability of trade union data used**

ICTWSS
Austria: 2000-2017; Belgium: 2000-2016; Bulgaria: 2000, 2003, 2005 and 2007-2016; Croatia: 2004, 2008 and 2011-2016; Cyprus: 2000-2016; Czechia: 2000-2016; Denmark: 2000-2016; Estonian: 2000-2017; Finland: 2000-2017; France: 2000-2005, 2008, 2010, 2013 and 2016; Germany: 2000-2017; Greece: 2002, 2004, 2007, 2010, 2013 and 2016; Hungary: 2000-2001, 2003, 2005, 2007-2008, 2012 and 2014-2016; Iceland: 2003-2016; Ireland: 2000-2017; Italy: 2000-2017, Latvia: 2003 and 2006-2016; Lithuania: 2001, 2003 and 2006-2016; Luxemburg: 2003-2004, 2006, 2008, 2010, 2012, 2014 and 2016; Malta: 2000-2017; Netherlands: 2000-2017; Norway: 2000-2017; Poland: 2000-2016: Portugal: 2002-2004, 2006, 2008 and 2010-2015; Romania: 2002-2003, 2006-2008, 2012 and 2016; Slovakia: 2000-2016; Slovenia: 2000-2016; Spain: 2000-2016; Sweden: 2000-2017; Switzerland: 2000-2016; Turkey: 2000-2003, 2008, 2013-2016; and the UK: 2000-2017.
European Social Survey
Austria: 2002-2010 and 2014-2016; Belgium: 2002-2016; Bulgaria: 2006-2012; Croatia: 2008-2010; Cyprus: 2006-2012; Czechia: 2002-2004 and 2008-2016; Denmark: 2002-2014; Estonia: 2004-2016; Finland: 2002-2016; France: 2002-2016; Germany: 2002-2016; Greece: 2002-2004 and 2008-2010; Hungary: 2002-2016; Iceland: 2004, 2012 and 2016; Ireland: 2002-2016; Italy: 2002-2004, 2012 and 2016; Latvia: 2006-2008; Lithuania: 2008-2016; Luxembourg: 2002-2004; Malta: not covered; Netherlands: 2002-2016; Norway: 2002-2016; Poland: 2002-2016; Portugal: 2002-2016; Romania: 2006-2008; Slovakia: 2004-2012; Slovenia: 2002-2016; Spain: 2002-2016; Sweden: 2002-2016; Switzerland: 2002-2016; Turkey: 2004 and 2008; and the UK: 2002-2016.

Appendix II
Trade union membership and density by gender

Table 4 **Average women's share in union membership, 2000s and 2010-2016**

	2000-2009	2010-2016	Difference
Nordic and 'Ghent system' countries			
Belgium (2002, 2008 and 2014)	40.1%	44.0%	+4.0%
Denmark (2000, 2002, 2004, 2008, 2013, 2015-2016)	50.0%	51.3%	+1.4%
Finland (2003, 2009 and 2013)	53.9%	54.8%	+0.9%
Iceland (2003-2016)	51.9%	52.1%	+0.1%
Norway (2001-2002, 2004, 2008 and 2013-2014)	52.7%	54.6%	+1.9%
Sweden (2000-2015)	51.9%	51.7%	-0.2%
Liberal-west European countries			
Cyprus (2002, 2008 and 2014)	36.8%	39.5%	+2.7%
Ireland (2001-2016)	47.5%	56.0%	+8.6%
Malta (2003, 2008 and 2012)	28.9%	31.1%	+2.5%
UK (2000-2016)	50.2%	56.2%	+6.0%
Central European countries			
Austria (2000-2016)	33.3%	35.1%	+1.9%
Germany (2001, 2003, 2007, 2010-2012, 2014-2015)	34.5%	35.4%	+3.9%
Luxembourg (2004, 2008 and 2013)	35.6%	36.9%	+1.4%
Netherlands (2000-2003 and 2005-2016)	33.2%	31.4%	+2.5%
Switzerland (2000 and 2013)	22.0%	35.8%	+13.8%
Southern European countries			
France (2003, 2008, 2010, 2013 and 2016)	45.1%	46.4%	+1.4%
Greece (2002, 2004, 2008, 2010 and 2012)	27.8%	32.1%	+4.3%
Italy (2002 and 2012)	38.3%	43.2%	+4.9%
Portugal (2002, 2006 and 2014)	41.5%	42.2%	+0.8%
Spain (2000, 2003, 2006, 2010 and 2014)	38.3%	41.9%	+3.5%
Eastern European countries			
Bulgaria (2003 and 2008)	40.1%	44.0%	+4.0%
Croatia (2013-2016)	n.a.	60.0%	n.a.
Czechia (2002, 2008 and 2014)	46.3%	49.0%	+2.7%
Estonia (2002-2015)	64.1%	59.4%	-4.7%
Hungary (2004, 2009 and 2015)	54.1%	50.1%	-4.0%
Latvia (2003, 2007 and 2015)	63.5%	65.2%	+1.7%
Lithuania (2003, 2008 and 2015)	56.7%	53.6%	-3.1%
Poland (2001, 2007 and 2014)	55.5%	59.0%	+3.6%
Romania (2003)	57.9%	n.a.	n.a.
Slovakia (2003, 2008 and 2016)	42.0%	46.2%	+4.2%
Slovenia (2002-2003, 2008, 2010 and 2012)	50.3%	51.1%	+0.8%
Other countries			
Turkey (2008 and 2013-2016)	15.1%	14.5%	-0.6%

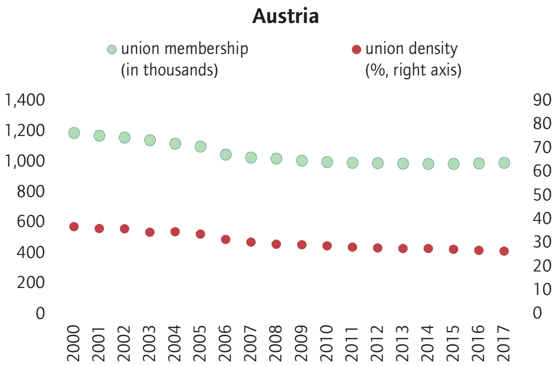
Note: Rounding errors possible.
Source: Visser (2019a): Available years between brackets.

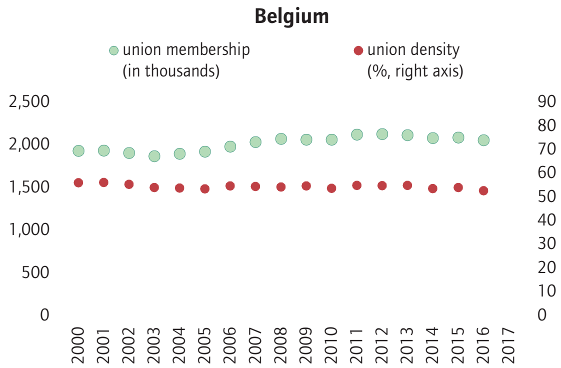
Table 5 **Union density by gender, 2000s and 2010-2016**

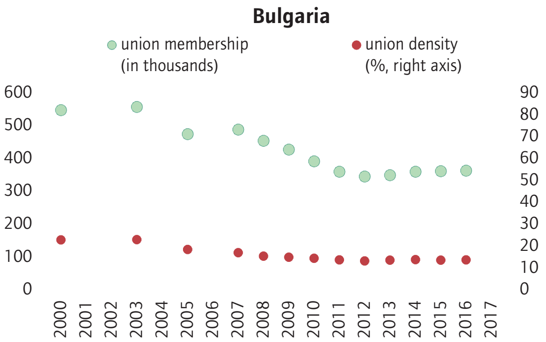
	Men			Women		
	2000-2009	2010-2016	Difference	2000-2009	2010-2016	Difference
Nordic and 'Ghent system' countries						
Belgium	60.1%	58.4%	-1.7%	48.8%	48.9%	+0.0%
Denmark	68.%	65.5%	-3.4%	73.1%	71.7%	-1.4%
Finland	66.5%	61.5%	-5.0%	74.9%	70.8%	-4.0%
Iceland	81.4%	84.7%	+3.3%	88.1%	89.4%	+1.3%
Norway	49.2%	47.5%	-1.7%	58.8%	60.5%	+1.7%
Sweden	72.0%	65.0%	-7.1%	77.0%	70.1%	-6.9%
Liberal-west European countries						
Cyprus	75.6%	58.5%	-17.0%	45.5%	34.2%	-11.3%
Ireland	34.5%	26.3%	-8.1%	34.0%	31.8%	-2.2%
Malta	60.3%	61.5%	+1.3%	46.8%	42.2%	-4.6%
UK	27.9%	22.7%	-5.2%	29.3%	28.1%	-1.2%
Central European countries						
Austria	41.3%	34.9%	-6.3%	24.0%	20.2%	-3.8%
Germany	28.0%	22.2%	-5.8%	15.5%	13.7%	-1.7%
Luxembourg	44.0%	39.6%	-4.4%	34.0%	28.9%	-5.2%
Netherlands	25.5%	22.0%	-3.5%	15.0%	14.8%	-0.2%
Switzerland	32.4%	19.1%	-13.3%	10.9%	12.1%	+1.2%
Southern European countries						
France	11.7%	11.9%	+0.2%	9.9%	10.1%	+0.2%
Greece	28.0%	26.4%	-1.6%	18.4%	15.2%	-3.2%
Italy	34.8%	37.6%	+2.8%	31.2%	34.7%	+3.5%
Portugal	22.8%	18.2%	-4.6%	18.4%	15.9%	-2.5%
Spain	19.1%	19.3%	+0.3%	15.4%	15.6%	+0.2%
Eastern European countries						
Bulgaria	19.5%	n.a.	n.a.	19.2%	n.a.	n.a.
Croatia	n.a.	20.0%	n.a.	n.a.	32.2%	n.a.
Czechia	19.5%	12.2%	-7.4%	19.7%	13.7%	-6.1%
Estonia	7.4%	5.4%	-2.3%	12.4%	7.0%	-5.3%
Hungary	13.1%	8.8%	-4.3%	15.7%	9.3%	-6.4%
Latvia	14.0%	9.2%	-4.8%	23.5%	15.7%	-7.8%
Lithuania	10.0%	7.6%	-2.3%	12.4%	8.1%	-4.4%
Poland	13.9%	9.1%	-4.8%	19.5%	14.8%	-4.7%
Romania	27.4%	n.a.	n.a.	44.5%	n.a.	n.a.
Slovakia	23.8%	11.1%	-12.7%	19.3%	10.8%	-8.5%
Slovenia	36.3%	22.1%	-14.2%	42.7%	25.1%	-17.6%
Other countries						
Turkey	11.8%	8.2%	-3.6%	7.0%	3.6%	-3.4%

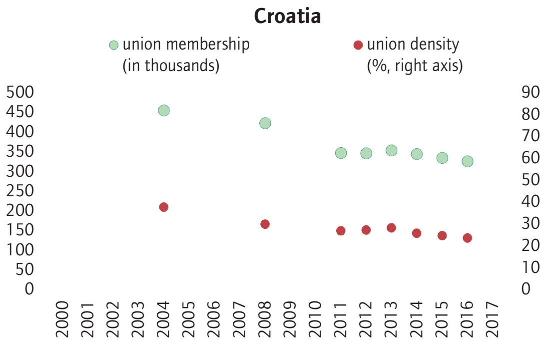
Note: Rounding errors possible.
Source: Visser (2019a). See Table 3 for exact data points.

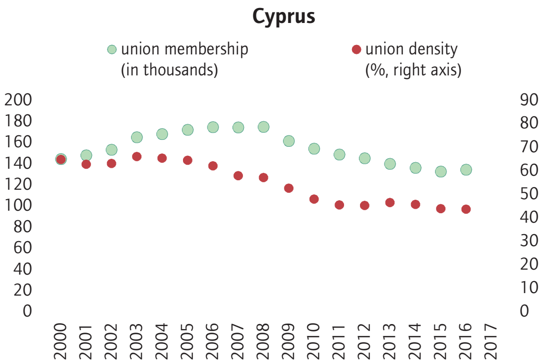
Appendix III
Yearly developments in union membership and density per country since 2000

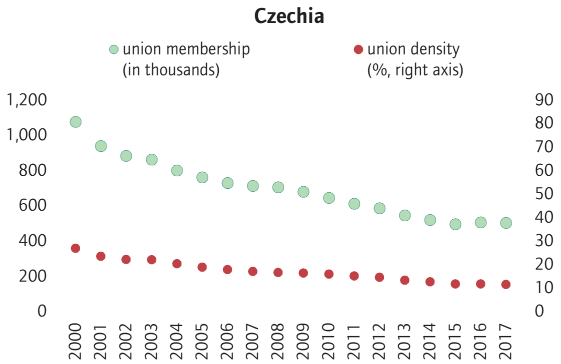

Austria
union membership (in thousands)
union density (%, right axis)
1,400
1,200
1,000
800
600
400
200
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

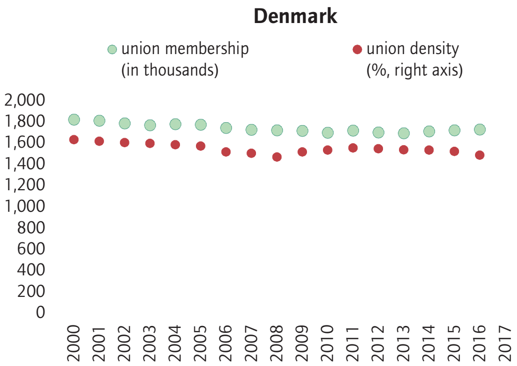

Belgium
union membership (in thousands)
union density (%, right axis)
2,500
2,000
1,500
1,000
500
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

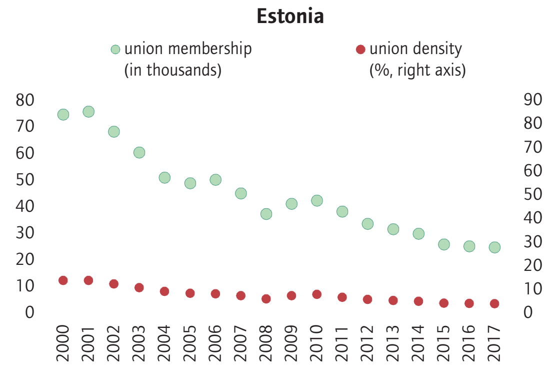

Bulgaria
union membership (in thousands)
union density (%, right axis)
600
500
400
300
200
100
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

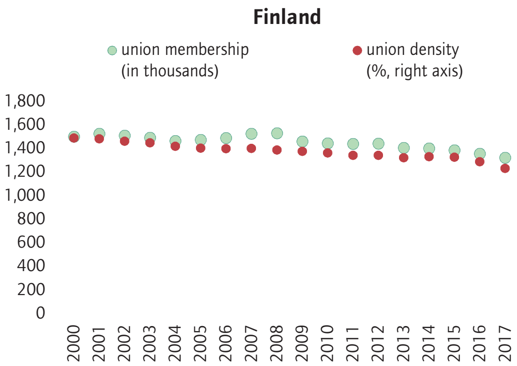

Croatia
union membership (in thousands)
union density (%, right axis)
500
450
400
350
300
250
200
150
100
50
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

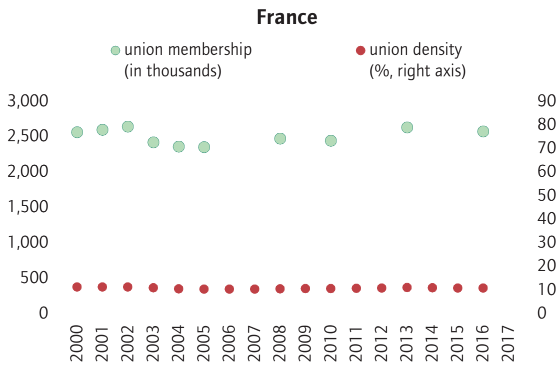

Cyprus
union membership (in thousands)
union density (%, right axis)
200
180
160
140
120
100
80
60
40
20
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

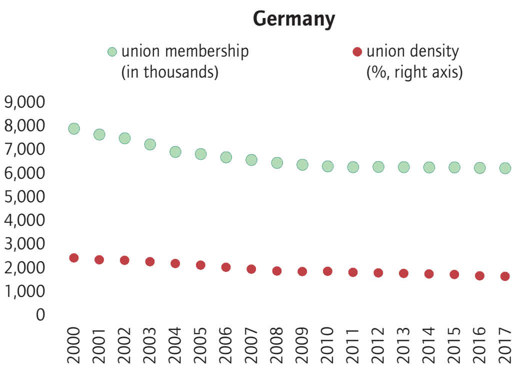

Czechia
union membership (in thousands)
union density (%, right axis)
1,200
1,000
800
600
400
200
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017


Denmark
union membership (in thousands)
union density (%, right axis)
2,000
1,800
1,600
1,400
1,200
1,000
800
600
400
200
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

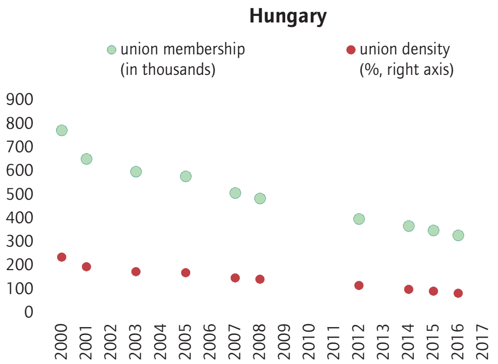

Estonia
union membership (in thousands)
union density (%, right axis)
80
70
60
50
40
30
20
10
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

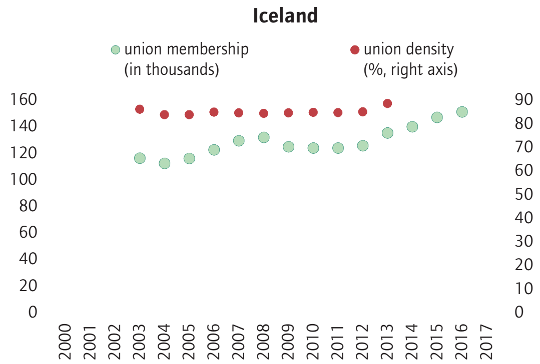

Finland
union membership (in thousands)
union density (%, right axis)
1,800
1,600
1,400
1,200
1,000
800
600
400
200
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

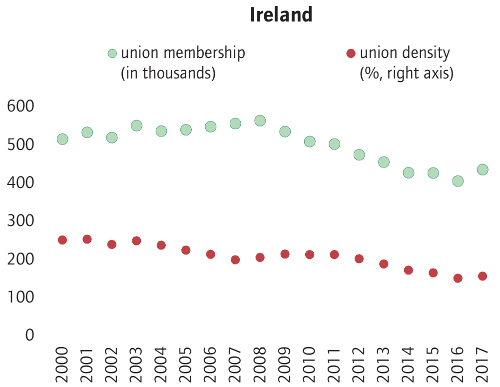

France
union membership (in thousands)
union density (%, right axis)
3,000
2,500
2,000
1,500
1,000
500
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

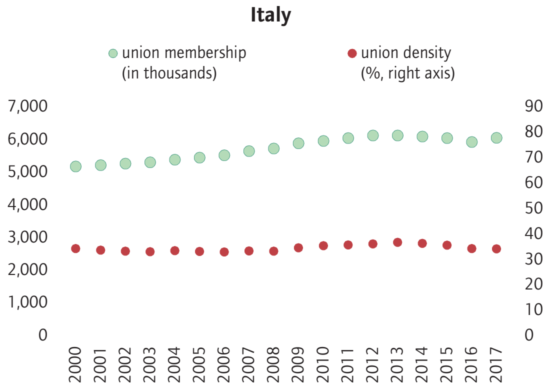

Germany
union membership (in thousands)
union density (%, right axis)
9,000
8,000
7,000
6,000
5,000
4,000
3,000
2,000
1,000
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

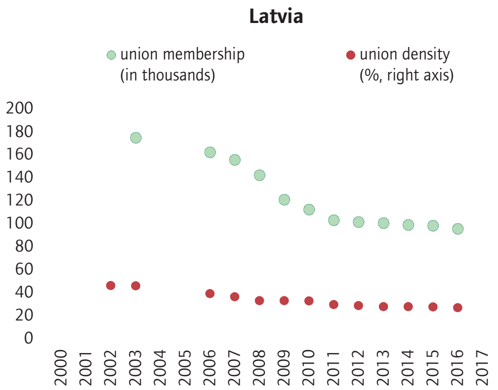

Greece
union membership (in thousands)
union density (%, right axis)
800
700
600
500
400
300
200
100
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

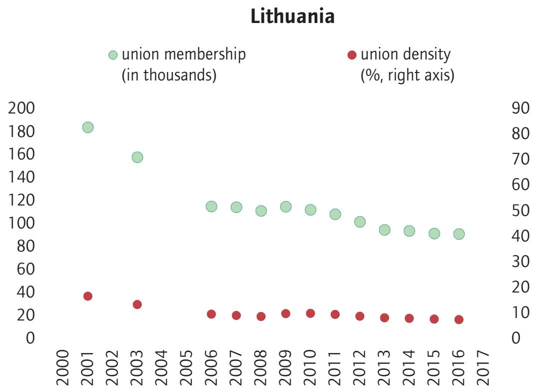

Hungary
union membership
(in thousands)
union density
(%, right axis)
900 800 700 600 500 400 300 200 100 0
90 80 70 60 50 40 30 20 10 0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

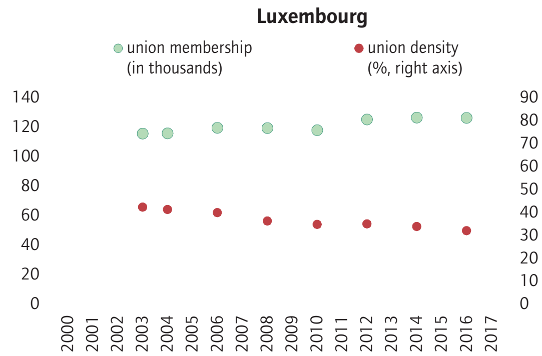

Iceland
union membership
(in thousands)
union density
(%, right axis)
160 140 120 100 80 60 40 20 0
90 80 70 60 50 40 30 20 10 0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

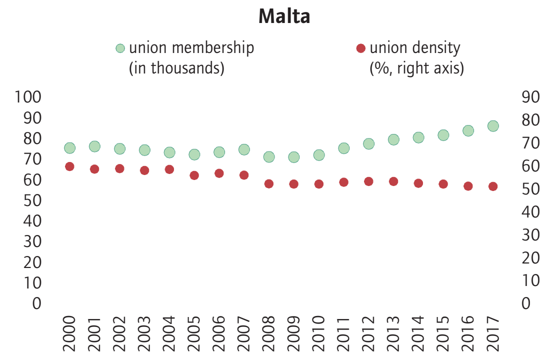

Ireland
union membership
(in thousands)
union density
(%, right axis)
600 500 400 300 200 100 0
90 80 70 60 50 40 30 20 10 0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

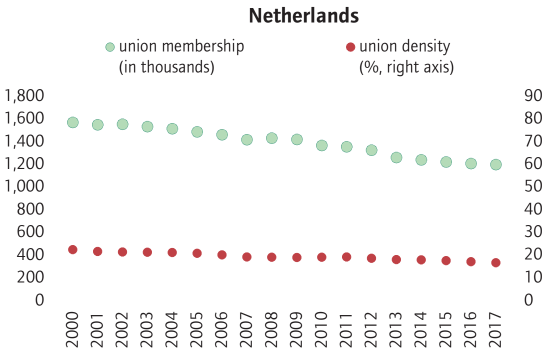

Italy
union membership
(in thousands)
union density
(%, right axis)
7,000 6,000 5,000 4,000 3,000 2,000 1,000 0
90 80 70 60 50 40 30 20 10 0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

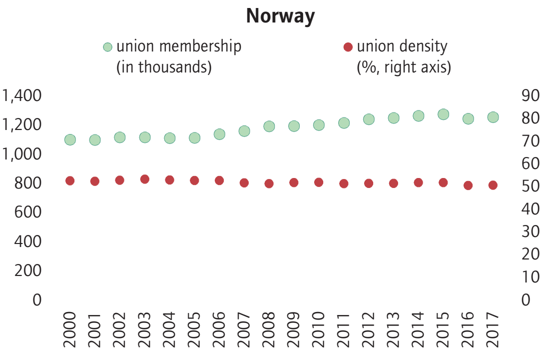

Latvia
union membership
(in thousands)
union density
(%, right axis)
200 180 160 140 120 100 80 60 40 20 0
90 80 70 60 50 40 30 20 10 0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

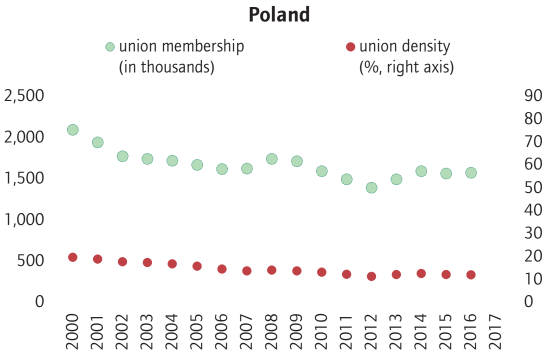

Lithuania
union membership
(in thousands)
union density
(%, right axis)
200 180 160 140 120 100 80 60 40 20 0
90 80 70 60 50 40 30 20 10 0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

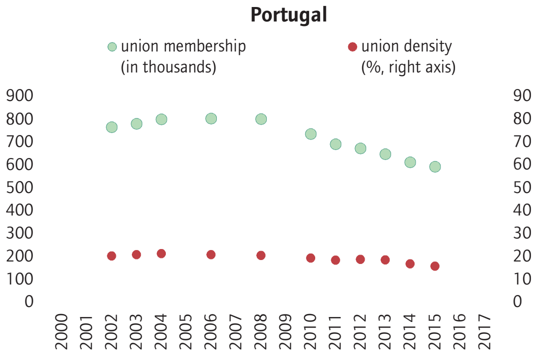

Luxembourg
union membership (in thousands)
union density (%, right axis)

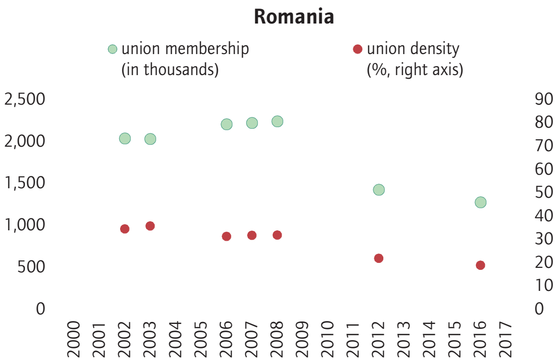

Malta
union membership (in thousands)
union density (%, right axis)

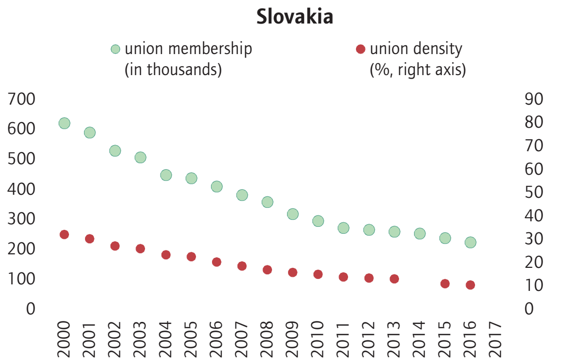

Netherlands
union membership (in thousands)
union density (%, right axis)

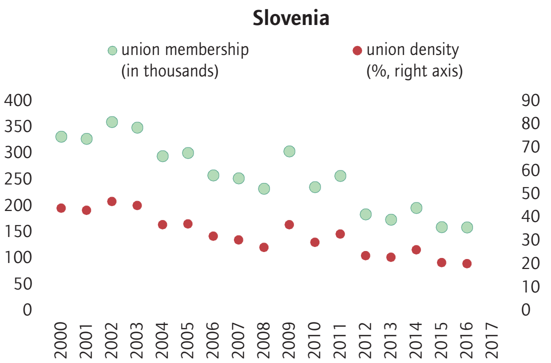

Norway
union membership (in thousands)
union density (%, right axis)

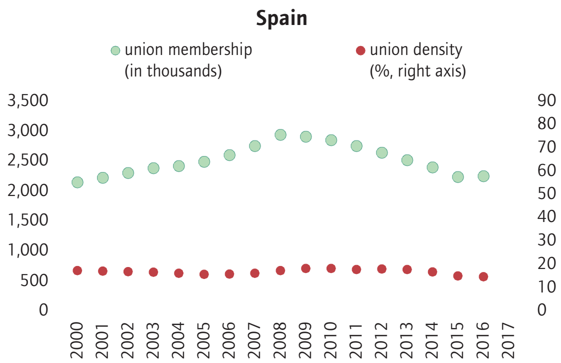

Poland
union membership (in thousands)
union density (%, right axis)

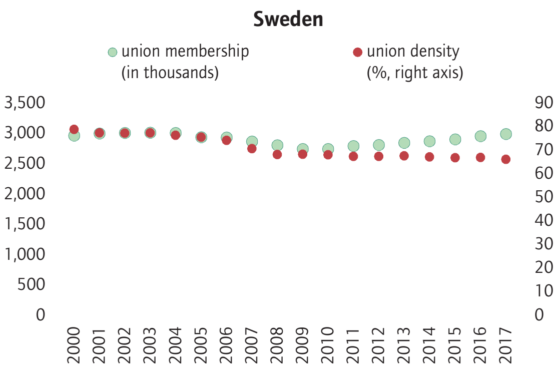

Portugal
union membership (in thousands)
union density (%, right axis)

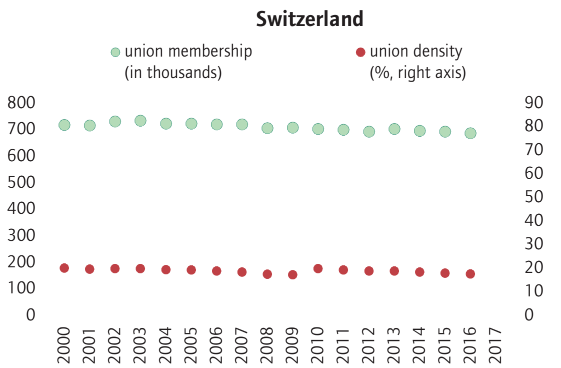

Romania
union membership (in thousands)
union density (%, right axis)

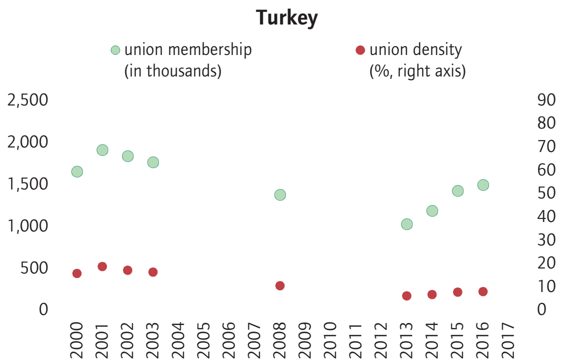

Slovakia
union membership (in thousands)
union density (%, right axis)

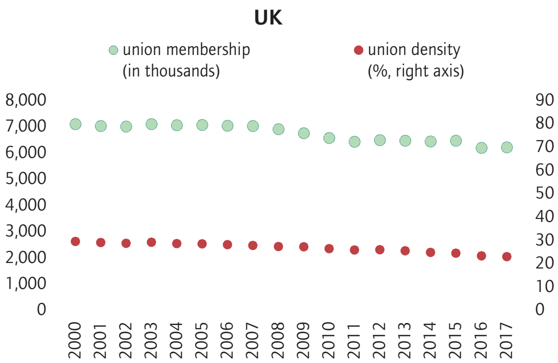

Slovenia
union membership (in thousands)
union density (%, right axis)


Spain
union membership (in thousands)
union density (%, right axis)


Sweden
union membership (in thousands)
union density (%, right axis)


Switzerland
union membership (in thousands)
union density (%, right axis)


Turkey
union membership (in thousands)
union density (%, right axis)
2,500
2,000
1,500
1,000
500
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017


UK
union membership (in thousands)
union density (%, right axis)
8,000
7,000
6,000
5,000
4,000
3,000
2,000
1,000
0
90
80
70
60
50
40
30
20
10
0
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

Acronyms

avg	average
CEE	Central and Eastern Europe
ETUC	European Trade Union Confederation
EU	European Union

Country codes

AT	Austria
BE	Belgium
BG	Bulgaria
CH	Switzerland
CY	Cyprus
CZ	Czechia
DE	Germany
DK	Denmark
EE	Estonia
ES	Spain
FI	Finland
FR	France
GR	Greece
HR	Croatia
HU	Hungary
IE	Ireland
IS	Iceland
IT	Italy
LT	Lithuania
LU	Luxembourg
LV	Latvia
MT	Malta
NL	Netherlands
NO	Norway
PL	Poland
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
SK	Slovakia
TR	Turkey
UK	United Kingdom

List of figures and tables

Figures

Tables

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