



Workers' Orientations to, and Views of, Union Voice in Ireland

Findings from the Working in Ireland Survey, 2025

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 The Working in
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This report examines workers' orientations towards, and views of, trade unions in Ireland. The data are drawn from the Working in Ireland Survey (WIIS), 2025. This is the second such WIIS survey. The first was conducted in 2021. Here, we look specifically at the structure of union membership, members' and non-members' disposition towards unions, the perceived effectiveness of unions, the incidence and reasons for union free-riding (-loading), and the coverage of collective bargaining. Our findings from the current survey are compared with those derived from WIIS 1 where appropriate and are set against the public policy context, particularly the potential influence of the Adequate Minimum Wages Directive and the Irish Government's attendant Action Plan.

Report Headlines

1. Consistent with a pattern that became evident in the mid-1980s, union density continues to decline. One in four employees are now members of a trade union. This can be read in either of two ways. First in a positive light. The number of workers represented by trade unions is substantial. It equates with more than half a million workers who are willing to pay a regular subscription to have a union represent their interests and concerns to their employer. This number places trade unions as being, by some distance, the largest civil society organisation in the country. A second reading is more pessimistic. In an economy in which the total size of the labour force has grown substantially in recent years, unions continue to struggle to stem the decline in union membership. Alarming, union density is now as low as that recorded some 100 years ago.
2. Set against this bleak backdrop of falling union density, however, is a bright counterpoint of a strong and growing belief and trust in trade unions among union members. Further, support for union representation among employees employed in non-union enterprises is very substantial and is little changed over the last four years: 44% would be willing to vote to establish a union in their workplace if afforded the opportunity. Young workers are particularly well disposed to seeking union representation. As such, there continues to be a large representation gap in the Irish labour market.
3. Support for union representation is particularly striking among younger age cohorts (16-44 years of age) employed in non-union firms. Over half of those aged between 16 and 24 years would vote for union representation and a little less than half would do so between the ages of 25 and 44 years.
4. Support for continued union representation is also strong among those we identify to be union free-riders/free-loaders. Roughly three-quarters of these workers indicate they would vote to maintain union representation within the enterprise in which they work.
5. It is also strong among workers employed in unionised companies but whose grade or occupational category debars them from union representation. Up to two-thirds of these non-union workers adhere to the view that union representation should continue for their colleagues, albeit there is probably no direct benefit for them.
6. The current survey's findings indicate an increase – on the results from 2021 – in a continued desire for union representation among staff in already unionised workplaces.
7. Union membership is increasingly becoming a female phenomenon. Women now make up a greater proportion of union members than men.
8. 15.5% of the national workforce were union members in the past but are no longer. This proportion is little changed from 2021.
9. The highest concentrations of union membership are in education and in public administration where almost two-thirds of workers are in unions. The hotel and food service industry has the lowest level at 5%.

10. Increases in union density over the last four years are small where they occur. In human health and social work, density increased from 41% to 44%; in electricity, gas, steam and air conditioning supply from 37% to 41%; and in manufacturing from 13% to 17%.
11. There is a clear and consistent relationship between workers' orientations towards union representation and the scale of household financial distress. As financial strain increases, support for establishing a trade union rises markedly, while opposition declines.
12. WIIS data show a strong and consistent association between exposure to workplace mistreatment and support for union representation. Across all three forms of mistreatment—verbal abuse, undesired sexual attention, and bullying or harassment—employees who report more frequent exposure are markedly more likely to support the establishment of a trade union.
13. The coverage of collective bargaining continues to decline. We estimate that coverage in 2025 to be 40%. This represents a decline on the 2021 figure of 43%. A previous estimate derived from a similar employee survey in 2003 found it to be 53%. This represents a decline of almost 24.5% over a period of 22 years.
14. When we use an adjusted estimate, which omits supervisors and managers from the analysis, we estimate the coverage of collective bargaining to be considerably less at 32.6%.
15. Using the adjusted estimate we find collective bargaining coverage to be 78% in state-owned companies, 73% in the public sector, and considerably less in not-for-profit organisations (32%) and in the private sector (18%).
16. Union influence is seen to have increased or held up well across a spectrum of areas over the last four years, including employees' terms and conditions of employment, the adoption of flexible working conditions and the organisation of work.
17. Off-the-job training, of all durations - from a few hours to over a year - is significantly more pronounced among workers in unionised enterprises.
18. With respect to on-the-job training, too, as many or more employees in unionised workplaces report that they receive this form of training.
19. More workers in non-union companies indicate that they are likely to leave their current employer to seek a job elsewhere than those working in unionised firms.
20. Workers in unionised companies are considerably more likely to have an occupational pension than are workers in non-union companies. They are also more likely to be afforded paid sick leave. Non-unionised workers are more likely, however, to report that their employer provides private medical insurance.
21. Female workers employed in unionised enterprises are more likely to be provided with menopausal and menstrual supports than female workers in non-unionised organisations. They were also more likely to be provided with paid maternity leave that goes beyond the statutory paid requirements.

1. The context: the decline of, and challenges facing, union voice in Ireland

As of the third quarter of 2025, according to results from the Central Statistics Office's Labour Force Survey (LFS), union membership in the Republic of Ireland stood at 543,200 members. Some twenty years earlier in 2005, it was approximately 555,000 members and, since then, while the numbers have oscillated up and down somewhat, the overall trend has been one of decline. More worryingly for union leaders, however, is that this continued fall in membership levels has occurred when the total size of the national workforce increased by over 400,000 workers over the same period (Q3 2005 to Q3 2025). Not surprisingly, then, the proportion of the national workforce in unions – a measure we refer to as trade union density – has declined steadily and precipitously from 33% in 2005 to 22.3% in 2025.

The decline in union density is clearly evident from the mid-1980s. Back then, now some 40 years ago, around 60% of the workforce were union members. This period represents the peak of union membership in Ireland. From then on, the long term trend of a continued decline in union density became increasingly evident in both the public and private sectors (Walsh, 2017; Geary and Belizon, 2022). Any recorded increase in trade union density, over this same period, has tended to be rare, small and short-lived, such as that which occurred during the period of the Great Recession in 2008/9 and during the Covid-19 Pandemic. Rather bleakly, the current level of union density equates with that last recorded in the 1930s.

The reasons for union membership decline are usually explained in terms of structural shifts in employment that include the demise of traditionally unionised sectors, the growth in atypical and precarious forms of employment together with an employer preference not to recognise

unions for the purposes of negotiating employees' terms and conditions of employment (Roche, 2008; Walsh 2015, 2018; Geary and Roche, 2006). For their part, trade unions have been faulted for not dedicating sufficient resources to organising and mobilising workers in non-union enterprises to join trade unions. Where they have tried and resourced new organising campaigns, success has been uneven (Geary, 2016; Geary and Gamwell, 2019; Murphy and Turner, 2020).

Union membership in Ireland is now concentrated primarily in areas of state employment, including health, education, public administration and defence. Formerly highly unionised sectors such as manufacturing, construction and transport have now comparatively low levels of union density. Elsewhere, and particularly in the new expanding sectors of the economy, such as in high-tech and social media, unions are a minor presence or are completely absent.

Our consideration of the evidence derived from the *Working in Ireland Survey* takes place at an important public policy juncture. Currently, employees in Ireland have the right to join a trade union and to seek to have that union recognised by their employer for the purposes of collective bargaining. However in reply, an employer is legally entitled to refuse any request by a trade union to bargain collectively, effectively neutering employees' right to union representation even in instances where they explicitly make such a request. Thus, union representation and access to collective bargaining, and ultimately whether a collective agreement will ever be arrived at, remains in large part in the gift of employers (see Doherty, 2013). There are some exceptions where the State and the Courts do intervene to mandate collective bargaining provisions in certain sectors which we review below.

While this remains the constitutional position, Irish trade unions took great hope that the European Union's Adequate Minimum Wage Directive, 2022 (AMWD) would, when transposed into Irish legislation, bolster the presence and diffusion of collective bargaining and the role and influence of trade unions in representing workers' interests. In simple terms, the Directive is designed to provide a legal framework within which Member States (MS) are obliged to provide for adequate statutory minimum wages, and promote and strengthen collective bargaining so as to reduce in-work poverty and wage inequality. Adding to union optimism was the Irish Government's convening in 2021 of a tripartite High-Level Working Group that reviewed collective bargaining structures and industrial relations

processes in Ireland. One of the report's recommendations proposes that where an employer refuses to negotiate with, or recognise, a trade union that has organised workers in its enterprise, that employer will be legally mandated to at least engage on one occasion with that union by way of a mechanism referred to as "Good Faith Engagement". However, there is no compulsion on the parties to arrive at a shared outcome or agreement (HLWG, 2022).¹

In reply to the HLWG report, employers, for the main part, have remained muted if not hostile in the face of any new measures that might have the effect of bolstering unions' presence in the workplace whether introduced by mandatory instruments or progressed by voluntary framework agreements. For their part, employer representative organisations are clear in making the case that existing industrial relations legislation is sufficient and need not be added to. While the Government has always avowed it will honour its obligations under the AMWD (as confirmed too in its Programme for Government), the former Minister for Enterprise, Trade and Employment intoned that while there is some unmet demand for union representation it is not a significant feature of the Irish labour market: "Ireland's economy is different from many other economies around Europe. There is not the same demand for union membership and representation in some sectors of the Irish economy as there is in others".²

In terms of concrete actions taken, the State has remained extremely cautious and tentative in responding to the requirements of the AMWD and to the proposals contained within the HLWG's report. At the time of writing

(May 2026) it has not implemented any of the principle recommendations of the HLWG and nor has it, in its formulation of an Action Plan to Promote Collective Bargaining, which is a requirement under the AMWD, adopted any measures intended to make legislative or structural changes to collective bargaining arrangements. Under the terms of the Directive it is quite within its rights not to do so, but its response, at least as portrayed by one informed observer, is cast as a minimalist transposition of the Directive (Müller, 2025).

Still, the Government's Action Plan does explicitly espouse the benefits of collective bargaining, saying it *"empowers employees, fosters mutual respect and contributes to a fairer, more productive economy"*, adding *"it is a cornerstone of constructive engagement between employers and workers"* and that it *"builds trust, improves working conditions, and supports resilience, particularly for small businesses."* It further states that there is "evidence ... that well-functioning collective bargaining systems can promote fair wages and decent working conditions, particularly in low paid sectors." However, notwithstanding these recited benefits, the measures within the action plan remain, for the main part, at the level of commitments to undertake initiatives jointly and variously with employers and unions, state industrial relations institutions and researchers. Some initiatives have merit and will be widely welcomed, but particular challenges can also be identified.

Those initiatives that are relatively unproblematic and will be welcomed by unions include commitments to undertake research on the reach and effects of collective bargaining, to resource collective bargaining training,

as well as a proposal to re-introduce tax relief for trade union subscriptions. There are two other measures, which, while having the potential to enhance unions' influence and strengthen collective bargaining, come with complications. They are measures numbered 10 and 18. The former "commit(s) (the Department of Enterprise, Tourism and Employment) to engaging with the Irish Congress of Trade Unions (ICTU) and the Irish Business and Employers Confederation (Ibec) on digital and physical access subject to agreed criteria". While not specified it has to be assumed this item refers to union representatives' access to workers and/or their workplaces, where the employer has not already ceded union recognition, either by being admitted right-of-entry to the physical premises where workers work or being provided with the names, phone numbers and/or digital addresses of workers. While not ignoring the challenge the latter would face in respect of passing muster with the relevant data protection legislation, any such provision, if facilitated, would indeed be significant for enhancing union's potential to reach and recruit new members, to identify their concerns, and therefrom to enhance their representative and bargaining capacity.

However, a number of obstacles come immediately to mind. First, it is hard to foresee how employers who are hostile or indeed simply ambivalent to union representation might be prepared voluntarily to cede access to union organisers to their employees or workplaces. And second, in that context, if employees themselves seek to organise their work colleagues, they risk exposing themselves to intimidation and victimisation (see Murphy, 2024; O'Sullivan and Murphy, 2024). As a consequence, protection

for activists is key, especially as Irish employment law affords limited legal protection against unfair treatment that falls short of dismissal (Doherty, 2024). This appears to be recognised by the State as there is a pledge within the Action Plan to examine the “legal protections or scope of legal protections for trade union representatives”, with a success indicator of “protections identified *and progressed*” (emphasis added). Further optimism might be taken from a parallel commitment by the State to review the operation of the Unfair Dismissals legislation as it relates to trade union membership and activity as part of the work of the new statutory Employment Law Review Group. The Review Group’s Chair has observed that it may well be the case that such an explicit examination will identify lacunae in the law (Doherty, 2025).

Measure 18 is stated as: “Review and strengthen ERO/SEO mechanisms and enforcement”. This is potentially significant as these are among the few such mechanisms providing for the establishment of sectoral norms (i.e., through *erga omnes* provisions) in regard to workers’ wages and conditions of employment in low paid sectors. Were EROs to take effect beyond the limited number of sectors in which they now pertain (cleaning, security and childcare) to include other sectors wherein wages are poor and union density is low, like social care, hospitality and retail, then, the reach of collective bargaining would extend to many hundreds of thousands of workers. The State too – if it was to be so minded – could provide added impetus to such initiatives by mandating employer adherence to sectoral provisions where they are in receipt of state funding or, in the awarding of public contracts, give a

bonus weighting to an employer willing to engage in collective bargaining and in a manner that need not infringe public procurement legislation. Or, if it was not so minded to issue such mandates, it could at least stipulate that adherence to such provisions would be desirable.³

However, the Action Plan steers clear of advancing two of the more significant – and controversial – HLWG’s recommendations: the first that sought to provide legal sanction or impose financial penalty on a non-union employer’s refusal to engage in “good faith” with a trade union, and the second that advised to remove an employer’s *de facto* veto on convening a Joint Labour Committee. The consequences of not pursuing the former are plain: if an employer is so inclined, they can “disregard” and render “nugatory” workers’ union membership and request for collective representation⁴. The consequences of not pursuing the second has the effect of preventing an ERO from being negotiated. The absence of such new substantive measures, which the Government defends on the basis of their discordance with Ireland’s voluntarist industrial relations tradition, are however themselves discordant – and will stymie – that part of action plan no. 18 whose ostensible intention is to promote sectoral collective bargaining through strengthening ERO mechanisms and enforcement. To state the obvious directly: weaken the provisions of a JLC and the inevitable knock-on effect is to weaken an ERO as a mechanism of establishing sector-wide collective bargaining coverage.

In sum, then, bound by these constraints it is difficult to foresee how the trade union movement might avail of the Action Plan to substan-

tially increase collective bargaining coverage, and, in turn, benefit by increasing their membership. In Ireland where company-level bargaining predominates, there are – it is logical to assume – only two means by which the State can meet its obligation to try to increase the coverage of collective bargaining; that is by either adopting sectoral-level mechanisms (for example, *erga omnes* clauses as in EROs); and second, by strengthening and facilitating the representative functions of trade unions. It is difficult in the extreme to see how Ireland's Action Plan will, of itself, help unions in either of these regards. By contrast, employers can be content that the State has not made any legislative provision that would provide substantive supports for sectoral collective bargaining or trade union recognition or representation. Indeed, Ibec's director of employment relations stated as much when she claimed non-union employers "haven't been overly perturbed with anything that's in" the action plan (McElwee, 2025).

In the end, the question of whether the EU Commission will be satisfied with the measures contained in Ireland's Action Plan remains moot. It may be that the Commission will be assuaged that the Plan meets the objectives of the Directive for now, but if few of the "success indicators" in the Plan are achieved in the coming years, the case might be made that

Ireland has not made the requisite efforts to strengthen the coverage of collective bargaining as the Directive (Article 4.2) obliges. Ultimately, however, a great deal will depend on how seriously the Commission takes its role in monitoring and reviewing the State's compliance with the Directive (Doherty, 2025). There might be a case for optimism in this regard following the recent European Court of Justice's ruling which also rehearses the requirement of Member States to notify the Commission of their efforts, through their action plans and reviews of their progress, to increase the coverage of collective bargaining.⁵

In this context and given the caution with which the State has formulated its response to the Directive, union leaders will be compelled to press hard to ensure that the Action Plan's aspirations and intentions are turned into substantive successful actions and, where they have not met the objectives set for them by the delineated timelines, that that failure be called out. In this context, too, unions will be compelled to look anew and with heightened concern at the decline in their membership and density levels, together with the attendant shrunken reach of collective bargaining. We turn now to document this bleak picture by drawing on the data from WIIS 2025, but it is balanced with what might and should be regarded as positive and encouraging trends.

2. The Working in Ireland Survey 2025

The Working in Ireland Survey 2025 (WIIS 2025) surveys people's work and employment on the island of Ireland. It is the most significant and comprehensive survey of its kind, covering a wide range of topics including skills and training, employee involvement and autonomy, the use of artificial intelligence, remote working, trade union allegiance, health and wellbeing, job churn and intention to quit, low pay, and job quality.

The fieldwork for the survey was conducted between May 15th and August 28th, 2025. A total of 3,040 interviews were conducted in Republic of Ireland and 1,260 interviews in Northern Ireland. The survey fieldwork was undertaken by Ipsos B&A in both jurisdictions.

This report refers only to the Republic of Ireland. A later report will look at workers' views of trade unions in Northern Ireland.

To ensure a nationally representative sample of working people aged 16 years and over, the data were weighted for age, gender, region and economic sector to agree with the then most recent population estimates as derived from the Republic of Ireland's Central Statistics Office's Labour Force Survey (LFS) Q1 2025. All the analyses in this report use the weighted sample.

The Working in Ireland Survey 2025 is the second survey in the WIIS series. The first survey, conducted between May and August in 2021, was confined to the Republic of Ireland. It had a sample size of 2,046. It also drew from a representative sample of people of working age in paid employment and was conducted by the same means as WIIS 2025.

A mobile telephone only sample approach was used. In the Republic of Ireland, the approach used was Random Digit Dial (RDD) whereby a sample was randomly generated using known mobile stems as provided by the Commission for Communications Regulation.

Respondents underwent a series of screening questions to confirm their eligibility for inclusion in the study, including inquiries about their age and employment status. The research was confined to working people, employed and self-employed, of over 16 years of age who were at work for at least one hour in producing goods and providing services for pay or for profit in the week prior to the survey.

All interviewers attended a training/briefing webinar convened by an Ipsos B&A project manager and which was attended by all call centre supervisors and the WIIS's principal investigator, John Geary. Interviewers had the opportunity to ask questions to all team members. Directly after the webinar, all interviewers logged on to the test script to familiarise themselves with the questionnaire and the routing of questions, and to address any queries they might have had before administering the survey in the field.

A pilot survey was also conducted to ensure that respondents understood the questions asked and were able to provide clear answers, as well as to ensure that the routing of questions was appropriate and that the questionnaire was not too long as to make unreasonable demands on respondents. New questions in the questionnaire were cognitively tested, first by members of the research team and second by the survey agency. Lessons were then shared and the questions adapted as required. The reformatted questions were then tested again during the pilot survey.

Several methods were employed to monitor the quality of interviewing, including a proportion of all interviews being monitored by supervisory

staff from the start to the end of an interview. For the WIIS 2025, 13.4% of the Republic of Ireland interviews and 15.9% of interviews in Northern Ireland were fully monitored. Call centre managers were responsible for the scheduling of resources, monitoring of interviewers and sample management, and were in close contact with the project management team, including the PI, to ensure fieldwork was progressing well and to respond to queries from the interviewers. Interviewing was conducted between 2pm to 9pm Monday to Friday, 10am to 6pm on Saturday and 11am to 7pm on Sunday.

Interviewees were dialled a minimum of three times, over various time periods such as afternoons, evenings and weekends.

3. Concepts and measurements

In our study we ask respondents whether they are a member of a trade union. In doing so, our wording differs somewhat from the LFS question wording. The LFS asks whether respondents are members of a trade union or staff association. Our focus is solely and specifically on trade unions which, unlike staff associations, are more likely to be independent of management and to have links with entities (i.e. trade unions) outside the workplace. Like the LFS, the figures we report relate only to employees currently in waged employment. As such, our measure of trade union density excludes those in union membership who are retired, unemployed or student members. This estimate of union density is commonly referred to as the net union density rate and it provides a more accurate representation of union presence in the workforce.

In this paper we employ descriptive quantitative techniques in our analysis of the data. In a later paper we will use more advanced statistical techniques. In reading the analysis' findings, then, care should be taken to appreciate that the findings, particularly as they relate to union effects are correlational and are not causal.

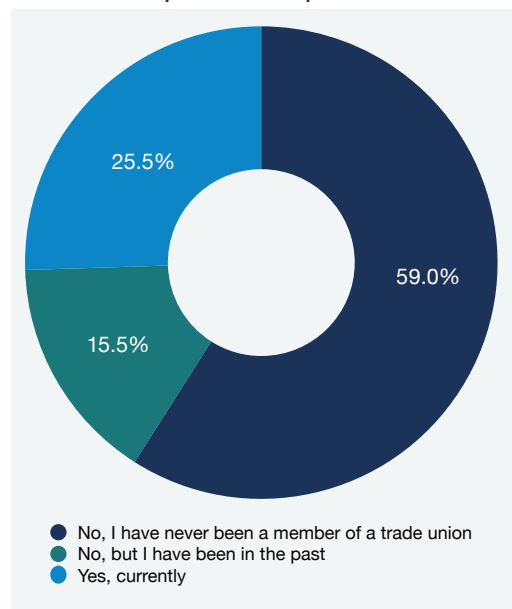
4. Findings

Union Membership in Ireland

In the Working in Ireland Survey 2025, 25.5% of employees reported they are trade union members. This represents a decline on the 2021 figure when it was recorded by WIIS 1 to be 28%. Our figures are somewhat larger than those found in the Labour Force Survey when, in the second quarter of 2021 and 2025, union density was recorded as 26% and 22.3% respectively. The LFS includes workers of a younger age which might go some way towards explaining the difference in results.⁶ However, irrespective of these differences, the decline in union density recorded by both the WIIS and the LFS surveys over the last four years in the wake of Covid-19 is similarly noteworthy.

Uniquely, WIIS is able to distinguish between two cohorts of non-union members. First, there are those employees who are not currently union members but who were at some point in the past. We refer to these as the 'union leavers'. These employees represent 15.5% of the national workforce (see Figure 1). This represents a very small decrease on the 2021 figure when it was 16%. The second cohort of non-union workers are those who have never been union members, which we identify as the 'never-have-beens'. These are by some distance the largest segment of the non-unionised workforce and represent 59% of employees. Their share of the employed workforce has increased by three percentage points since 2021 when it was 56%.

Figure 1: Incidence of Union Membership in the Republic of Ireland



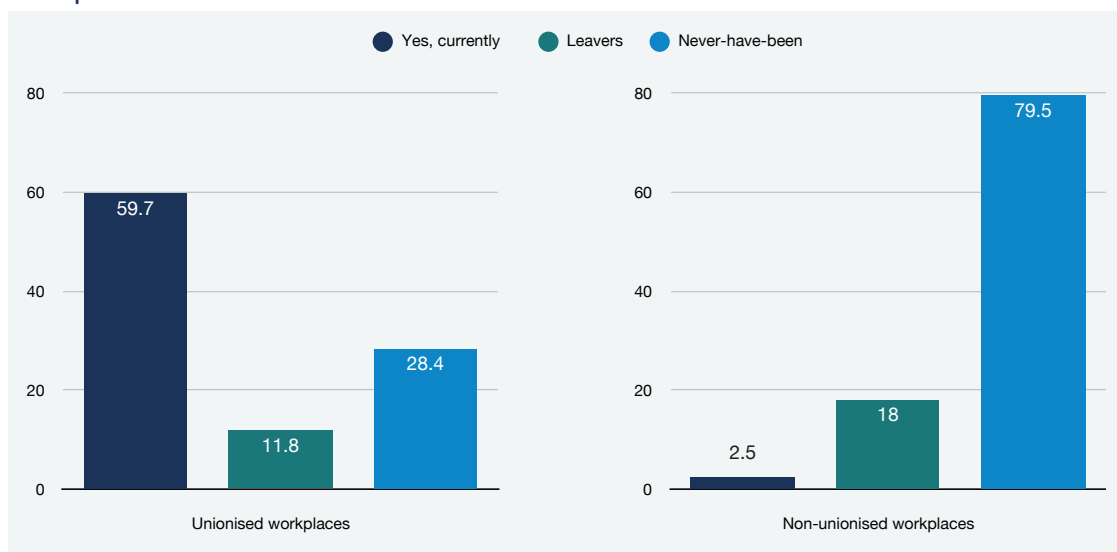
N = 2,710

Distribution of union membership across unionised and non-unionised workplaces

When we look at the distribution of union membership in unionised workplaces, we see that while a majority of employees are union members (almost 60%), a substantial minority, over 40%, are not currently unionised. Notably, more than a quarter (28.4%) of workers in unionised workplaces have never been union members and almost 12% were union members at one time but are no longer.

Comparatively, when we look solely at the distribution of union membership in non-unionised workplaces, not surprisingly most employees here have never been union members (circa 80%). Current union membership is virtually absent, while one in five workers are former trade union members (leavers), suggesting that they may have formerly worked in unionised employments.

Figure 2: Distribution of union membership across unionised and non-unionised workplaces



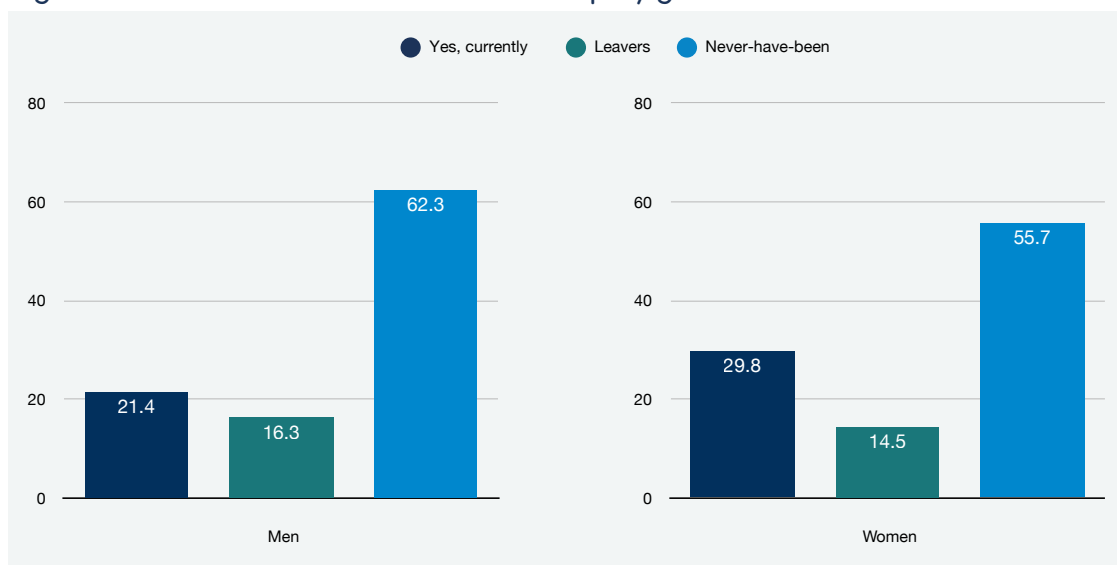
N = 2,711

Distribution of union membership by gender

When union members are profiled on the basis of individual-level characteristics, it is notable that there continues to be significant gender differences in levels of union density: 21% of males as compared with 30% of female

employees are union members. The respective proportions for 2021 were 25% and 32%. Thus, the fall in union membership is more marked among males than it is among females. Resigning from union membership is also more evident among male employees than it is among females: some 16% of males as compared with

Figure 3: Distribution of union membership by gender



N = 2,703

14% of females report that they had been trade union members in the past but are no longer. A broadly similar picture was evident in 2021.

There also continues to be a marked difference in the gender composition of union membership. It too is increasingly becoming more female. While there was little difference some 20 years ago, in 2021 WIIS 1 found that 54% of union members were women while 46% were men. Women now account for a clear majority of current union members (58.1%), whereas men are more prevalent among both union leavers (53.0%) and those who have never been union members (52.8%).

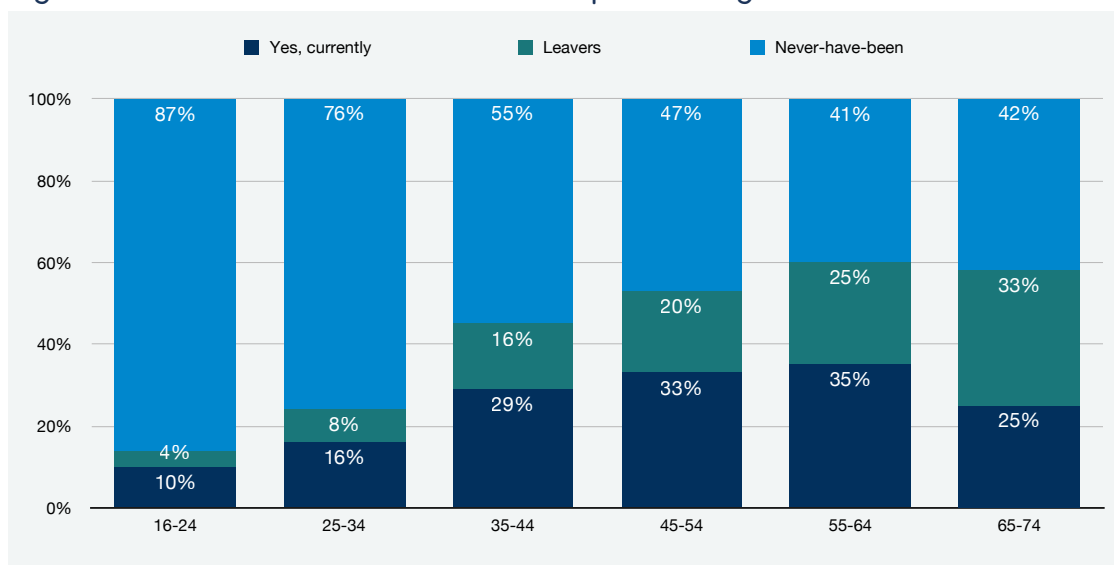
Correspondingly, women are more likely than men to be current union members, while men are disproportionately represented among those who have discontinued union membership or never joined. This pattern suggests that the decline in male union density reflects not only higher rates of union exit, but also a greater propensity among men never to join a union in the first place.

Distribution of union membership across age cohorts

We also examined union membership across various age cohorts. Density levels were found to be highest among those employees aged between 55 and 64 years of age (35%), followed by those aged between 45 and 54 years of age (33%) and 35 to 44 years of age (29%). Among younger age cohorts, the proportion of employees who are in union membership is considerably lower, falling to 16% for those aged between 25 and 34, and 10% for those between 16 and 24 years. The data is displayed in the stacked bar chart in Figure 4 below. A striking feature of the data displayed here is the proportion of those employees in older aged cohorts who are not in union membership currently but who were in the past.

When the data from WIIS 2 are compared with those of WIIS 1, an uneven trend emerges: among those between the ages of 45 and 54, and 55 and 64, union density declined by 6 and 10 percentage points respectively. It rose, however, by 4% among the

Figure 4: Distribution of union membership across age cohorts



N = 2,708

oldest aged cohort (from 21% to 25%) and also by the same proportion (from 25% to 29%) with those employees aged between 35 and 44 years. It was unchanged for those between 25 and 34 year olds and declined by 4.5% in the youngest age cohort.

Distribution of union membership across economic sectors

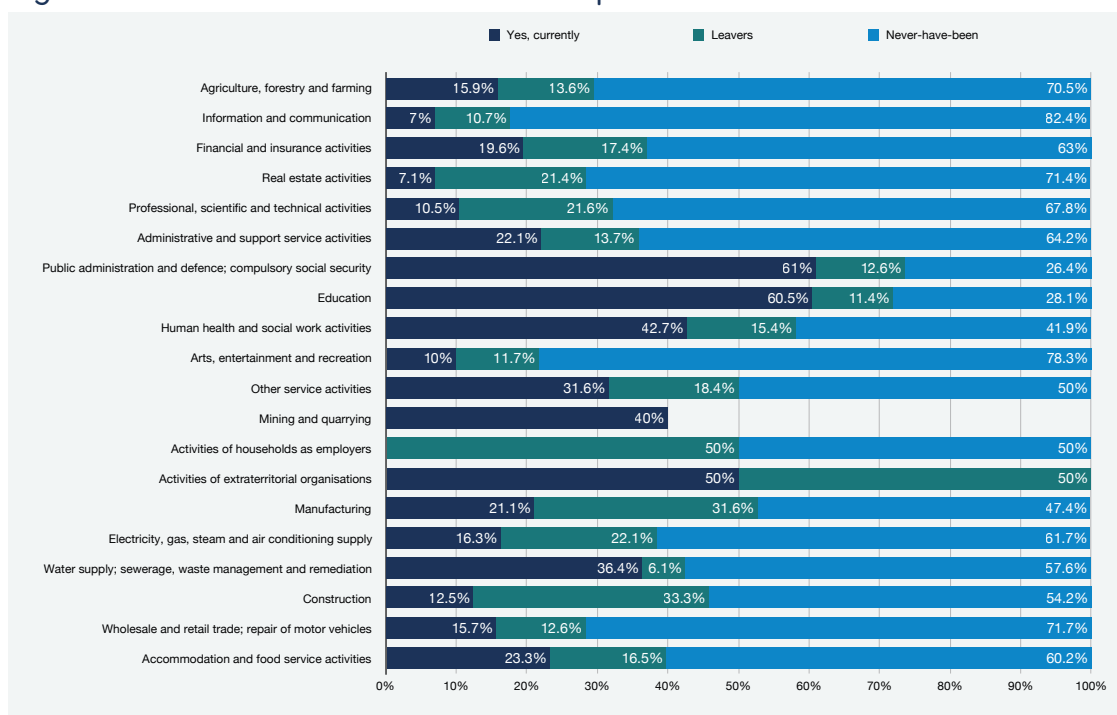
We turn now to examine union density across different sectors. It is notably high in two sectors: public administration and defence (61%), and education (60.5%). While union density remained unchanged in education since 2021, it has declined appreciably in public administration and defence – by 12 percentage points – since 2021. This is accounted for, in the main, by an increase in those workers who have never been union members. They now account for 26.4% of workers in this sector, where in 2021 they constituted 16%. Those who have ceased to be

union members increased too, from 11% to 12.6%.

Declines are also recorded in administration and support services, from 27% to 22.1%; in professional, scientific and technical activities, from 20% to 10.5%; in accommodation and food service activities, from 7% to 5.6%; in transport and storage, from 34% to 9.0%; in wholesale and retail from 12% to 15.7%; in water supply, sewerage and waste management, from 37% to 36.4%; and finally, in agriculture, forestry and fishing, from 24% to 15.9%.

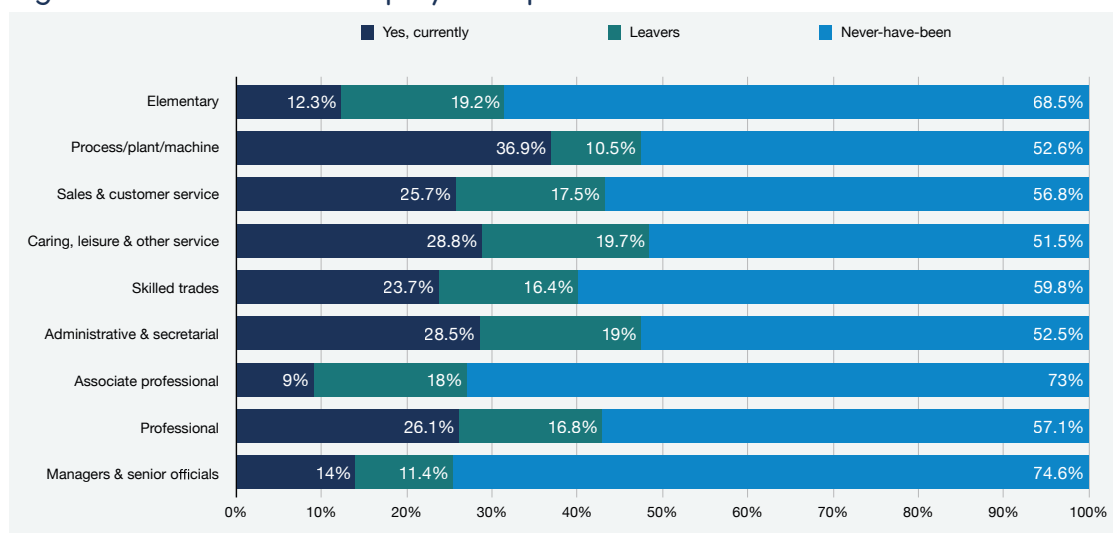
Apart from education, union density has remained relatively stable in a number of other sectors, including in arts, education and recreation (10.0%), finance and insurance (19.6%), information and communication (7.0%), electricity, gas, steam and air conditioning supply from (36.4%) and construction (12.5%).

Figure 5: Distribution of Union Membership across Economic Sectors



N=2,709

Figure 6: Union Membership by Occupation



N= 2,443

By contrast, increases in union density are rare where they occur. In human health and social work, density increased from 41% to 42.7%; and in manufacturing from a low level of 13% to 21.1%.

Distribution of union membership across occupations

There are some pronounced variations in union density across occupations. Those occupying process/plant machine operator roles have the highest levels of union density at almost 37%. Union density is also relatively high among those in professional (26.1%) and administrative and secretarial roles (28.5%). Density is lowest among those in elementary and associate professional positions.

Preferences for Union Representation among Employees in Non-unionised Workplaces

In an attempt to gauge workers' orientations towards union representation we divide our sample into two groups, first those employed in non-unionised organisations and second those

employed in unionised organisations. We treat the former first. Respondents in non-union organisations were asked, "if a vote to establish a union was held in your organisation today, would you vote yes to establish a union, or would you vote no not to establish a union." This question is a standard measure in the international literature of the presence or otherwise of a representation gap or deficit in the labour market. In Table 1 we present the data obtained for this question in WIIS 1 and WIIS 2. The data reveal little change in the proportion of respondents who would vote in favour of union representation across the two waves of the survey. In both cases it is roughly 44%. There has, however, been a notable fall-off in the proportion of employees who would be opposed to union representation and who would vote against it; it has declined from 37% of the workforce to 28%. There has been a commensurate increase in those who are undecided as to how they might vote.

Thus, the data can be read to suggest that the proportion of the national non-union workforce who would wish to have union representation at work

Table 1: Desire for union representation among workers employed in non-unionised firms

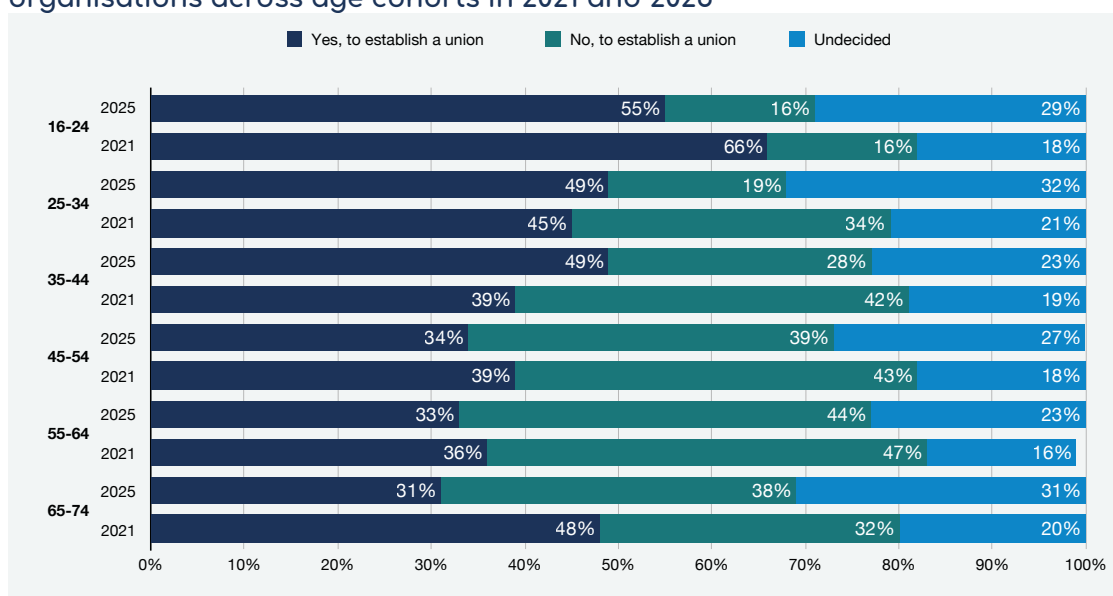
	2021	2025
Yes, to establish a union	43.7%	44.3%
Not, to not establish a union	37.1%	28.3%
Undecided	19.2%	27.4%

is very substantial and is little changed over the last four years. This points to there being a significant representation gap or deficit among workers. Further, those workers who hold an outright objection to union representation has declined considerably.

When workers' age is taken account of, it is evident that support for union representation is particularly strong among younger age cohorts (16-44 years of age) in non-union firms. Thereafter, it is evident that this support has shifted in different directions over the past five years across different age groups. The most notable change between 2021 and 2025 is a decline in support for establishing a union across older age cohorts. This decline is relatively modest among

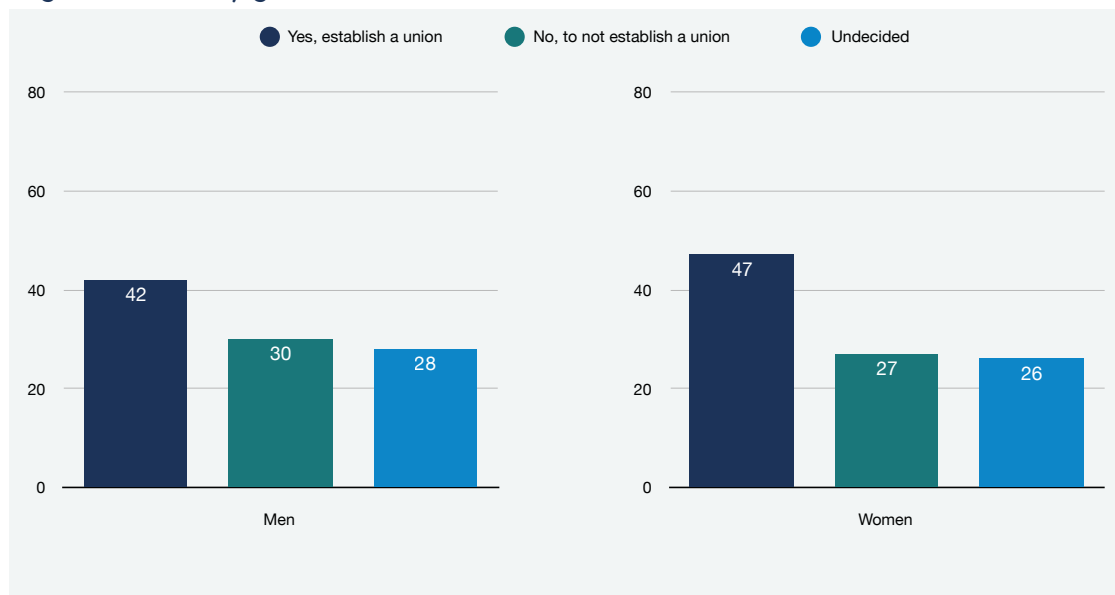
those aged between 45 and 64 years of age, but is more substantial among those between 65 and 74 years of age. In contrast, support for union representation has increased among younger workers aged between 25 and 44 years, albeit not among those in the youngest age cohort, 16 to 24 years.

Overall, then, the data can be read to suggest that opposition to union representation among workers in non-union enterprises is more evident among older age cohorts, from 45 years and older. Among the other younger age groups, support for union representation reads more assured. Where it is not, respondents are more likely to record they are undecided on the matter with fewer registering outright opposition.

Figure 7: Orientations to Union Representation among workers in non-unionised organisations across age cohorts in 2021 and 2025

N = 1,620 (WIIS 2025) / N = 1,183 (WIIS 2021)

Figure 8: Orientations to union representation among workers in non-unionised organisations by gender



Note: N = 1,614

We can also assess orientations to unions among female and male workers in non-union organisations. Female employees show a greater likelihood of being more well-disposed towards union representation than are their male colleagues. See Figure 8.

Orientations to union representation among workers in non-union organisations by ability to make ends meet

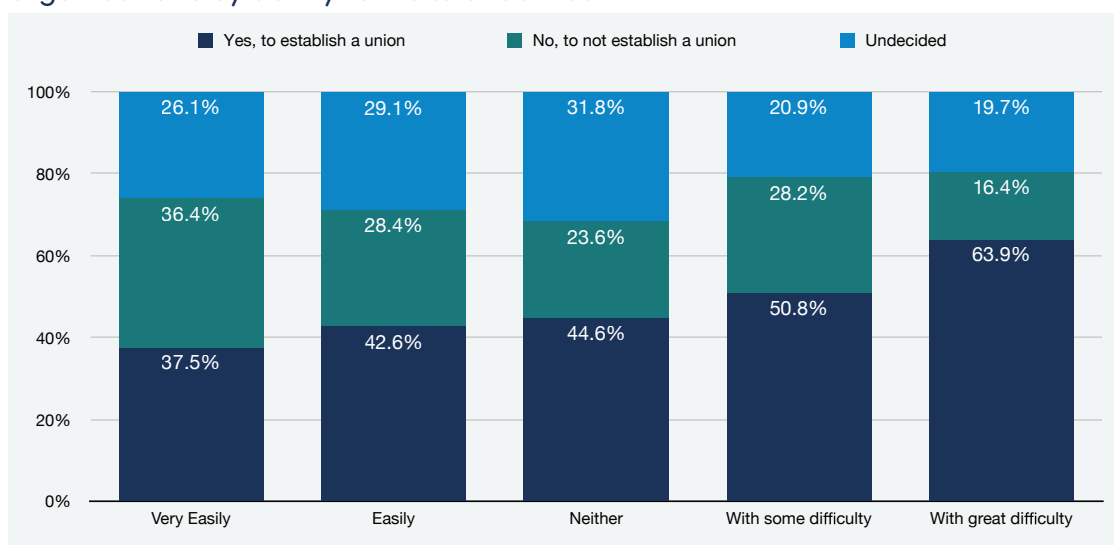
Next, we examine workers' orientation to union representation in regard to their household's financial ability to make ends meet. Figure 9 shows a clear and consistent relationship between workers' orientations towards union representation and the scale of household financial distress. As financial strain increases, support for establishing a trade union rises markedly, while opposition declines.

Among respondents who report that their household finds it very easy to make ends meet, support for establishing a union is relatively modest (37.5%),

and opposition is almost equally prevalent (36.4%), with a further 26.1% remaining undecided. This indicates a relatively divided set of attitudes towards union representation among the most financially secure employees.

Support for unionisation increases steadily thereafter. Among those who report that they are able to make ends meet "easily", 42.6% are in favour of union representation. Among those who fall into the neither category, 44.6% favour union representation. Among those struggling to make ends meet support for union representation rises starkly, while opposition and indecision declines appreciably. This is a pronounced shift in attitudes. Among those who report making ends meet "with some difficulty", a majority (50.8%) indicate that they would vote to establish a union, while opposition falls to 28.2% and indecision to 20.9%. This pro-union orientation is strongest among those who report making ends meet "with great difficulty", where almost two-thirds (63.9%) would vote in favour

Figure 9: Orientations to union representation among workers in non-union organisations by ability to make ends meet



N = 1,608

of establishing a union, compared with just 16.4% who would vote against and 19.7% who remain undecided.

Overall, the data demonstrate a strong association between economic insecurity and pro-union sentiment. Employees facing greater difficulty in meeting household expenses are substantially more likely to support union representation, suggesting that material conditions play an important role in shaping preferences for collective voice and representation at work.

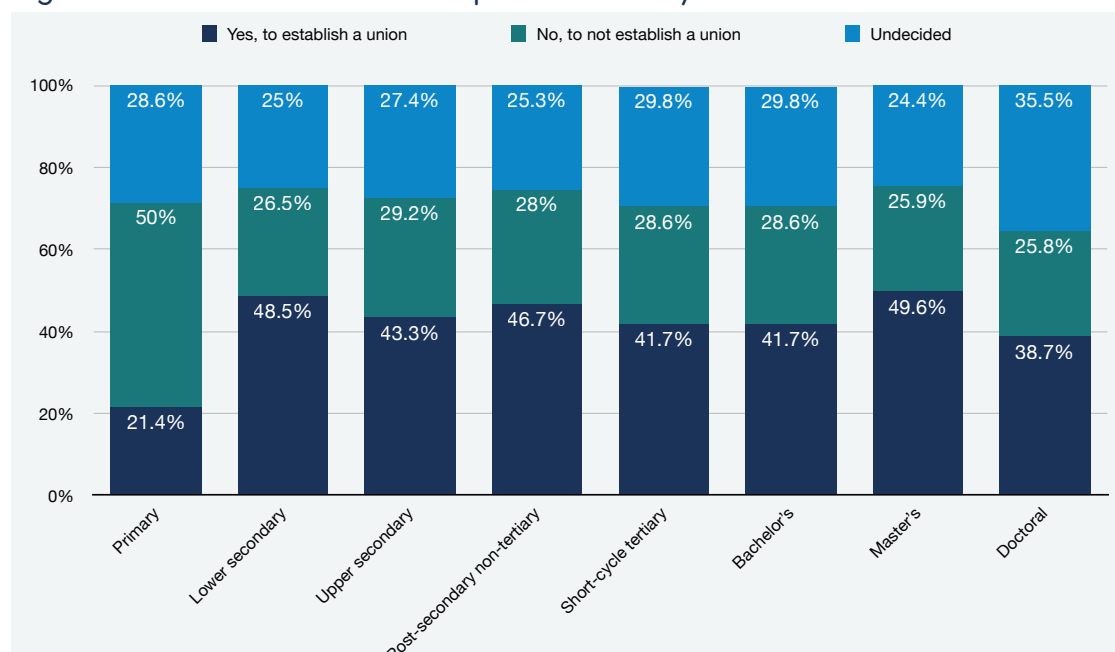
Orientations towards union representation among workers in non-union organisations by level of educational attainment

Orientations towards union representation vary systematically by level of educational attainment, with notable differences in both support for unionisation and the balance between opposition and indecision. Support for establishing a union is lowest among respondents with a primary education solely, where just over one fifth (21.4%)

indicate that they would vote in favour of unionisation. In this group, opposition is particularly high (50.0%), while a further 28.6% remain undecided. This suggests relatively weak pro-union sentiment and considerable ambivalence among the least formally educated respondents.

Preference for union representation increases markedly among those with lower secondary (48.5%) and upper secondary education (43.3%). In these groups, support for unionisation clearly exceeds opposition, indicating more favourable orientations towards collective representation among respondents with mid-level educational qualifications. A similar pattern is observed among respondents with post-secondary non-tertiary education (46.7%) and short-cycle tertiary education (41.7%), although in these categories opposition and indecision together account for a substantial minority. This suggests more mixed but still generally favourable attitudes towards union representation within these intermediate education groups.

Figure 10: Orientation to union representation by education level



N = 1,601

Among respondents with a Bachelor's degree, support for establishing a union reaches its highest level (49.6%), with opposition comparatively low (25.9%) and around one quarter remaining undecided (24.4%). This indicates a relatively strong pro-union sentiment among graduates at this level. By contrast, among those with Master's and Doctoral-level qualifications, support for unionisation declines somewhat (40.4% and 38.7% respectively), while indecision becomes more prominent, particularly among those with doctoral degrees, where over one third (35.5%) remain undecided. This suggests greater ambivalence or uncertainty towards union representation at the highest levels of educational attainment. See Figure 10.

Orientations towards union representation among workers in non-union organisations by level of exposure to workplace mistreatment

WIIS data show a strong and consistent association between exposure to workplace mistreatment and support for union representation in non-union workplaces. Across all three forms of mistreatment, verbal abuse, undesired sexual attention, and bullying or harassment, employees who report more frequent exposure are markedly more likely to support the establishment of a trade union.

In cases of verbal abuse, support for unionisation is highest among those experiencing abuse weekly or daily, where more than two thirds indicate that they would vote to establish a union. Support declines progressively as the frequency of abuse decreases,

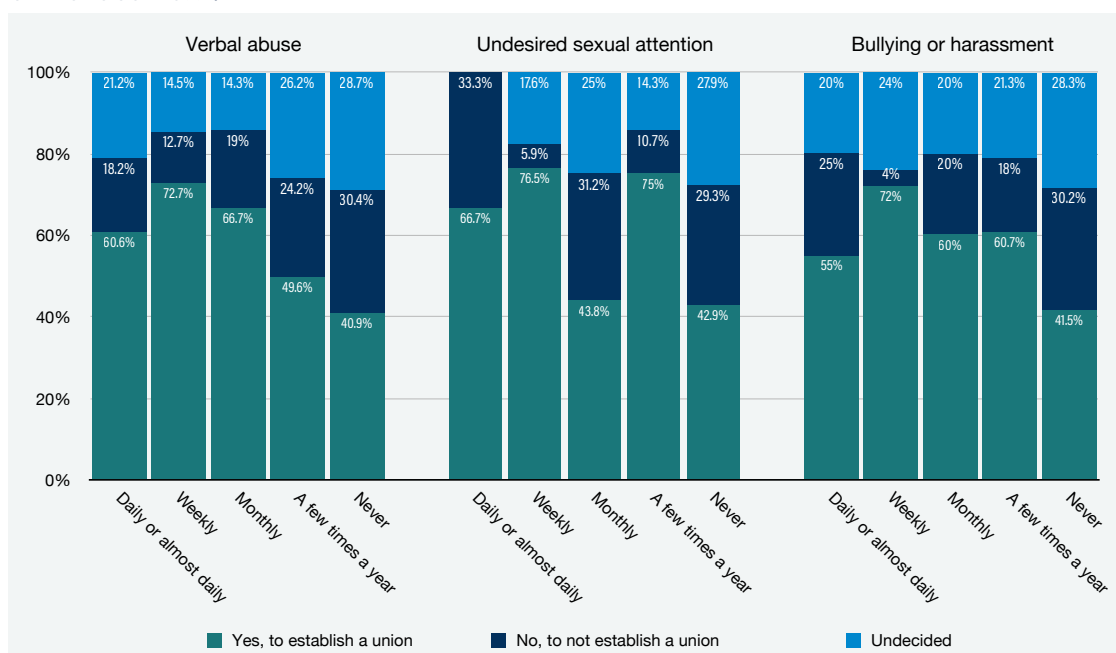
falling to around 41% among those who report never experiencing verbal abuse. At the same time, opposition to unionisation increases steadily among those reporting no exposure, while indecision remains comparatively modest across categories.

A similar, and even more pronounced, pattern is evident for undesired sexual attention. Among respondents who experience such behaviour daily or weekly, support for union representation is extremely high, exceeding three quarters in some categories, while opposition is minimal. Although the proportion supporting unionisation declines among those reporting less frequent or no exposure, support remains higher than opposition across all frequency categories, indicating a strong association between this form of mistreatment and pro-union orientations.

Patterns for bullying or harassment closely mirror those observed for verbal abuse. Employees reporting frequent bullying or harassment show very strong support for establishing a union, particularly among those experiencing such behaviour weekly. Support declines among those reporting no exposure, but still remains substantial, with over 40% indicating they would vote in favour of unionisation even among those who report never experiencing bullying or harassment.

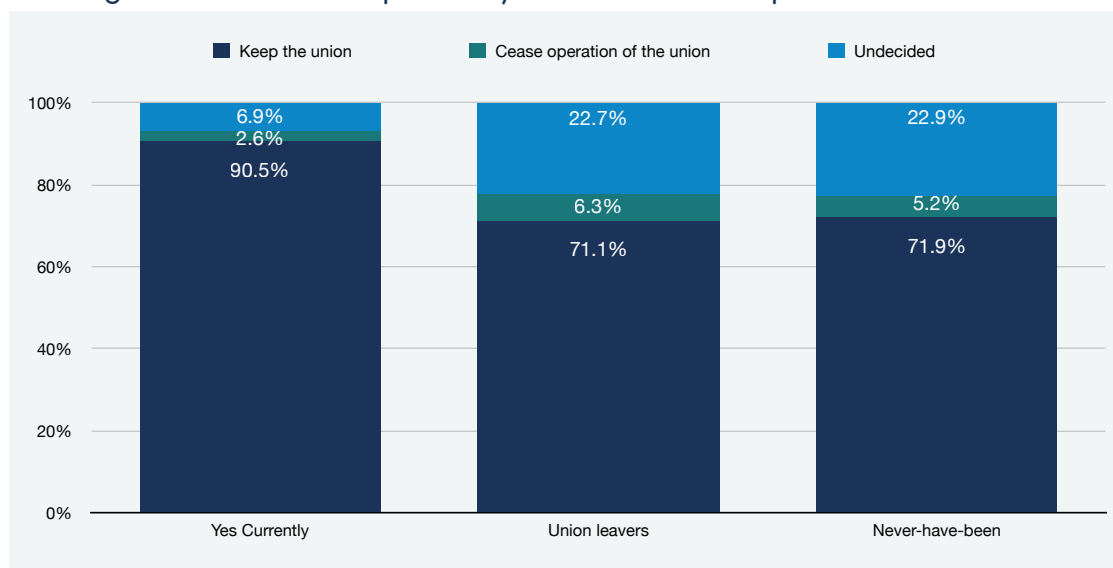
Across all three dimensions, indecision is most evident among those reporting lower or intermittent exposure, suggesting greater ambivalence where mistreatment is less severe or less frequent. By contrast, where mistreatment is frequent, preferences are clearer and overwhelmingly oriented towards union representation. See Figure 12.

Figure 12: Orientations to union representation among workers in non-union organisations in cases of verbal abuse, undesired sexual attention and bullying or harassment.



N = 213/718 [verbal abuse]; N = 64/716 [undesired sexual attention]; N = 141/717 [bullying or harassment]

Figure 13: Orientations for Continued Union Representation among Employees Working in Unionised Workplaces by Union Membership Status



N = 1,090

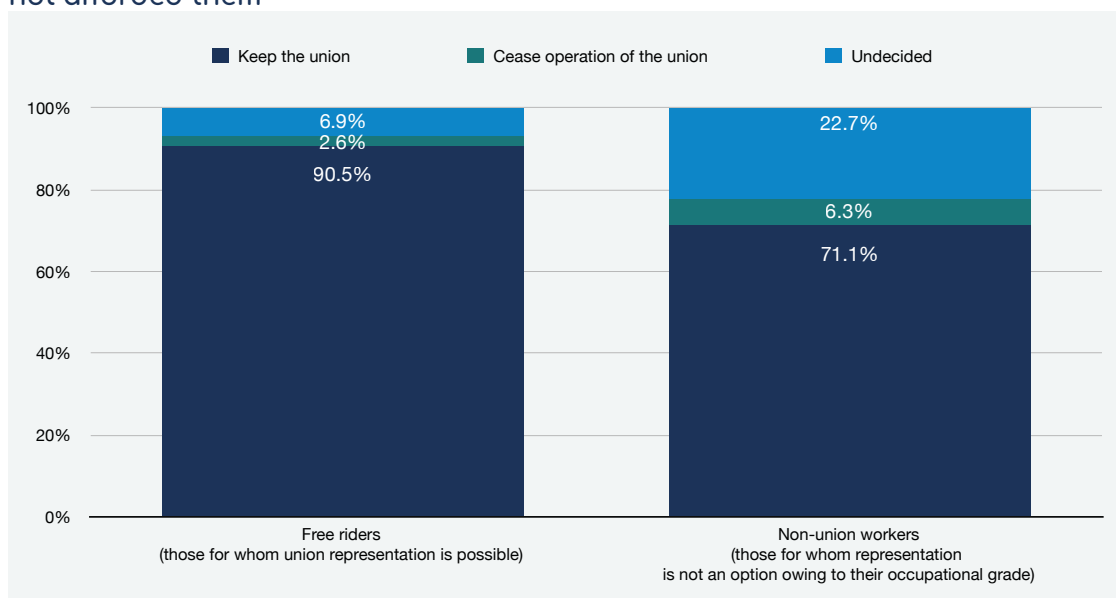
Orientations to union representation among workers employed in unionised organisations

A broadly similar question to that put to workers employed in non-union organisations was asked of workers who are employed in already unionised organisations. The question enquired whether these workers would vote, be they themselves union members or not, to retain union representation or dispense with it. Eighty-three percent confirmed their continued support for union representation, 4% said they would vote to have the union discontinue in its role and 13% are undecided. When compared to the results of the 2021 survey, the current survey's findings indicate an increase in a continued desire for union representation among staff in already unionised workplaces. There was little if no difference in viewpoint between male and female employees. There was however some difference in view as between employees who were in union membership and those who were not.

Support for continued representation was strongest among union members at over 90% but lower among the other two cohorts of non members (i.e., former union members and never-have-been union members). Still, three-quarters of these workers confirmed their view that the union should continue to be recognised by management, even if they themselves were not members.

We also looked to see if there are differences in the views of different non-union member groups towards union representation within unionised enterprises. Here, we distinguish between two groups of employees, those for whom union membership is denied them because of their occupational classification or grade, and another group who we classify as union free-riders (sometimes referred to as free-loaders). A free-rider is defined as a person not in union membership but whose category of employment or occupation does permit them to join a union if they so wished. Despite their not paying union

Figure 14: Non-union Member Groups' Orientations towards Union Representation within Unionised Enterprises: a comparison of union free-riders (i.e. they could join a union if they wished) and those for whom union representation is not afforded them



N = 402

dues, these employees still benefit from union representation; hence, the term union free-rider.

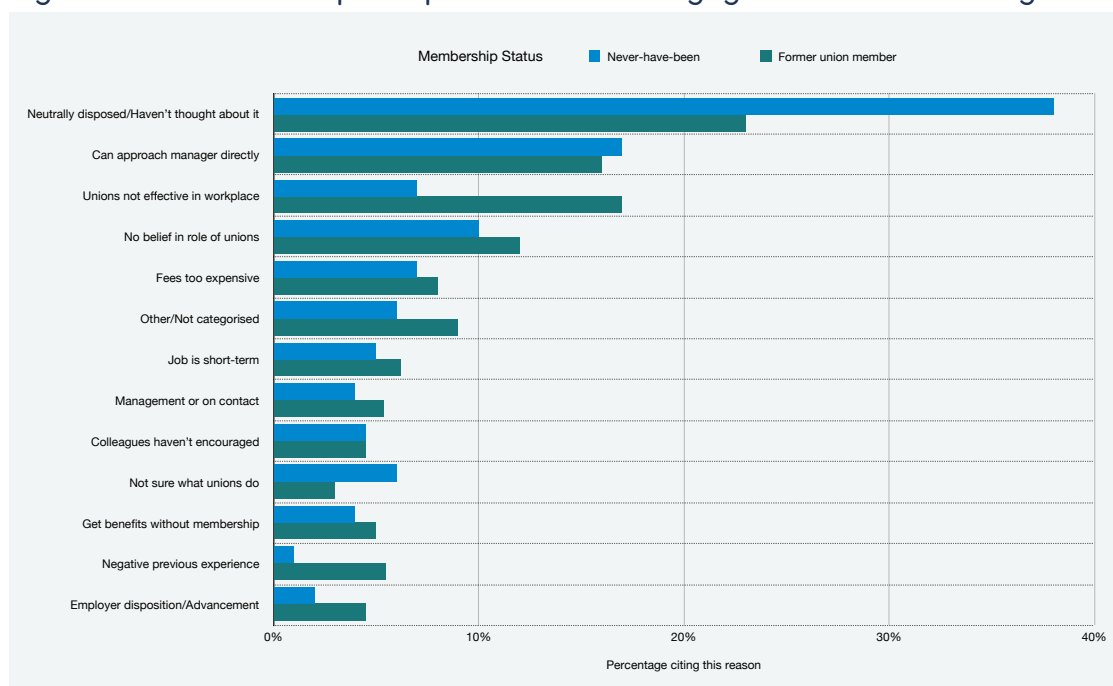
The results are revealing (see Figure 14 above). Free-riders, in the main (roughly three-quarters) exhibit support for continued union representation. Among the other category for whom union representation is not available, and who do not have their interests represented by a union, many (around two-thirds) nevertheless adhere to the view that union representation should continue, albeit there may be no direct benefit for themselves.

What predisposes workers to engage in union free-riding?

Among those non-union workers who work in unionised companies and for whom union membership is available to them, we asked “why did you decide not to join a trade union?” A list of possible reasons was

offered and interviewees were invited to select all that may have applied to them, including any other reasons that were not listed. The data presented in figure 15 overleaf suggest that active opposition or ideological rejection of trade unions is rare among non-union members – among never-have-been union members only 10% say this is the reason while a little more of former members indicate this as a factor. The most frequently cited reasons relate to members not have given the matter a great deal of consideration, and many of whom remain neutrally disposed towards union membership. This disposition is particularly apparent among those who have never been union members. Thereafter, the factors that matter most include, respondents feel they can approach management directly if they have a problem or concern at work, and also the perceived workplace ineffectiveness of unions.

Figure 15: Reasons that predispose workers to engage in union free-riding



N = 312

While the former is slightly more apparent among never-have-been union members, the latter is more evident among former union members. Those who might be portrayed as “hard core” free-riders, that is those who decidedly avoid joining a union on the basis that they can avail of the benefits of union representation while remaining non-union members, are few in number and represent less than 5% of respondents. Only a small share of respondents explain their reasons for not joining a union as being based on the cost of union dues, or that management are not well disposed to unions, or that it may damage their future employment, or that they have had a negative experience in the past of union, or that they themselves are members of management or are on a short-term contract, or that they have not been encouraged by colleagues to join. Ignorance of the role performed by unions seems to matter little, too.

Overall, the pattern suggests that non-membership is driven less by anti-union sentiment and more by contextual and pragmatic considerations, including perceptions of the quality of management-employee relations and individual employment circumstances. These findings are consistent with interpretations of non-union membership as reflecting latent support or indifference rather than principled opposition. However, this does not discount the role of perceptions of union (in)effectiveness, particularly among former union members, in accounting for some workers opting not to join a union.

Collective bargaining coverage

Collective bargaining is the term used to describe the process whereby an employer deals directly with trade union representatives in matters relating to the negotiation of

employees' terms and conditions of employment. The resulting collective agreement exists to ensure that when labour is sourced and deployed it is in a manner which accords with the terms of the collective agreement and/or with employees' contract of employment. Thus, collective bargaining is conceived as a means both of setting the cost of labour and as a rule-making process (Flanders, 1970) which may go beyond workers' pay to include their hours of work, health and safety, leave entitlements, pension provision, working practices, grievance representation, terms of redundancy, and so on.

The term collective bargaining coverage refers to the number of workers, or the proportion of workers relative to the population of workers in paid employment, whose pay and/or conditions of employment are determined by one or more collective bargaining agreement(s). However, determining the share of the national workforce whose terms and conditions of employment are covered by collective bargaining is a difficult exercise, particularly in the absence of data derived from nationally representative labour force surveys. In Ireland, we typically rely on statistics derived from administrative sources and estimates provided by government ministries, employers' organisations and trade unions. These data sources in turn have been used by international agencies, like the OECD and ILO, to determine collective coverage rates in Ireland.

The collective bargaining coverage rate is greatly influenced by a number of factors including union density levels; employer organisation, representative capacity and orientations towards union representation; the location of

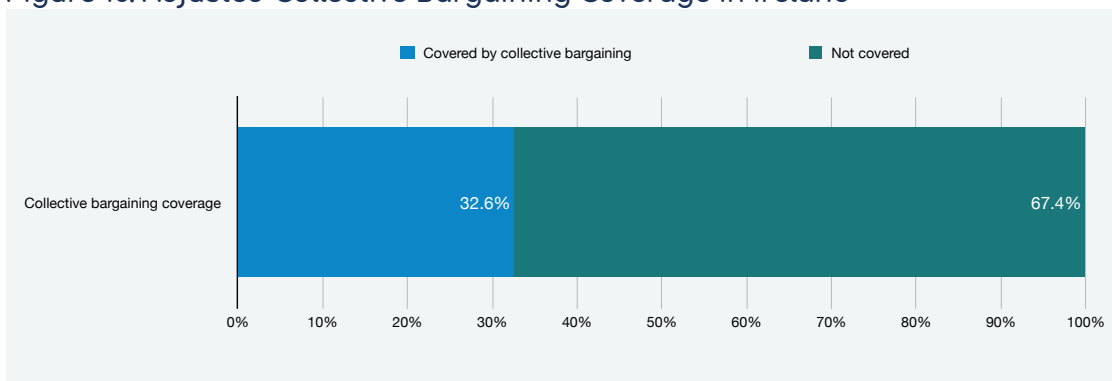
bargaining; and whether there exists measures to extend the terms of an agreement to all enterprises and employees in a given sector.

In Ireland, between 1987 and 2009 collective bargaining was conducted primarily at a national level under the aegis of a succession of tripartite agreements involving government, employers and unions. In some instances, there was provision within these agreements for enterprise-level bargaining, but it was for the main part tightly defined and delimited. Sectoral bargaining, uniquely in a European context, was and is, for the most part, absent in Ireland save for that provided for under specific sectoral mechanisms that apply to particular sectors wherein union density is usually low, collective negotiations are poorly established, and rates of pay are poor.⁷

During the period of national-level agreements, the coverage of collective bargaining, in theory at least, extended to all those sectors both in the public and private sectors in which there was a union presence. While collective bargaining coverage was close to 100% in the public sector (a very small number of senior civil servants do not have their pay determined by collective bargaining), overall, across all sectors of the economy, the OECD estimated collective bargaining coverage to have been around 70%.

With the demise of centralised bargaining in 2009, the locus of collective bargaining in the private sector shifted to the level of the individual enterprise in which unions have a presence. Bargaining remained centralised, however, in the public sector, with the parties – the Government and the Irish Congress of Trade Unions Public

Figure 16: Adjusted Collective Bargaining Coverage in Ireland



N = 3,040

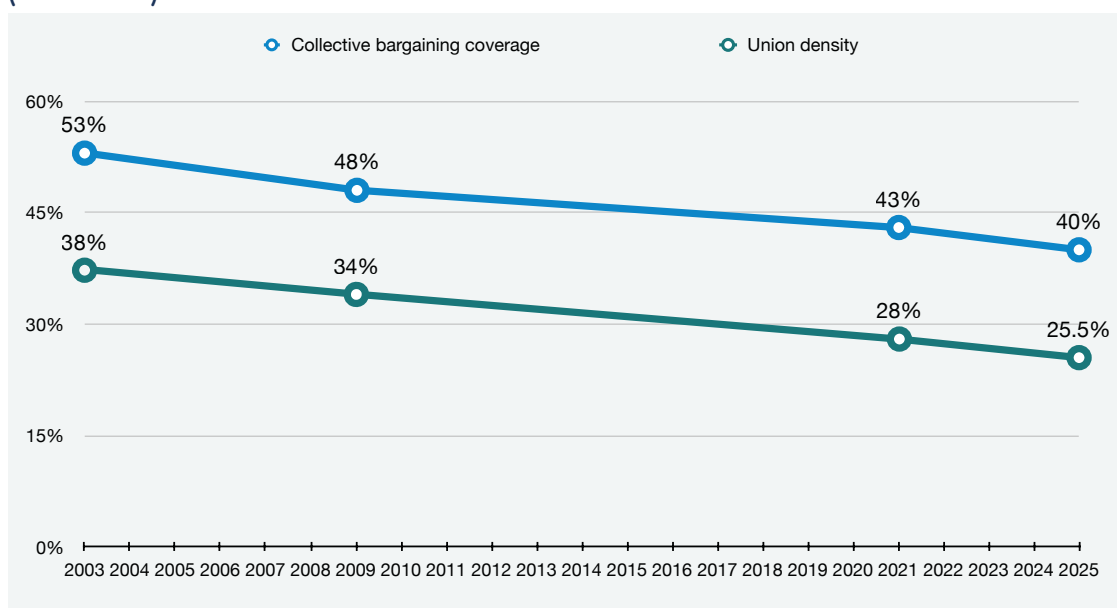
Service Committee – ratifying a series of multi-annual public service pay agreements. In tandem, the collective bargaining coverage rate declined considerably. By 2017, the OECD reported collective bargaining coverage to have fallen to 34%. To place this figure in an international context, while it is considerably above that found in the UK and New Zealand, it is appreciably below that of the Scandinavian countries, and Austria, Germany and the Netherlands.⁸ The OECD has not provided any update on this figure since then. Its 2017 figure relies on estimates derived from administrative data provided by Professor Jelle Visser of the University of Amsterdam that in turn were obtained from various heterogeneous sources from within Ireland.

In this report, we estimate the coverage of collective bargaining in Ireland by drawing on contemporary data from the WIIS surveys of 2021 and 2025. Survey respondents were asked whether there is a trade union recognised by the organisation where they work that negotiates workers' pay and/or conditions of employment. In 2021, 43% of employees reported the existence of such an arrangement. In 2025, this figure fell to 40%.

Both figures are probably a generous estimate of the coverage of collective bargaining as some of our respondents occupy managerial positions and, while they might work in unionised organisations, the terms of any collective agreement are unlikely to apply to them.

To overcome this limitation we conducted a separate analysis in which we only include those who are union members and union free-riders (that is, and as described above, those workers for whom union membership is available to them but who decide not to join) and who work in unionised organisations. Despite their not being union members, free-riders still benefit from the provisions of a collective agreement and as such are said to be 'covered' by the terms of any collectively bargained agreement. All those who state they occupy supervisory and/or managerial positions are omitted from the analysis. From this calculation we estimate the coverage of collective bargaining in 2025 to be 32.6%. We refer to this measure as our adjusted measure and the other as our unadjusted estimate.

Figure 17: Collective Bargaining Coverage (unadjusted figure) and Union Density (2003-2025)



Source: WIIS 2021, 2025 and O'Connell et al., 2004, 2010

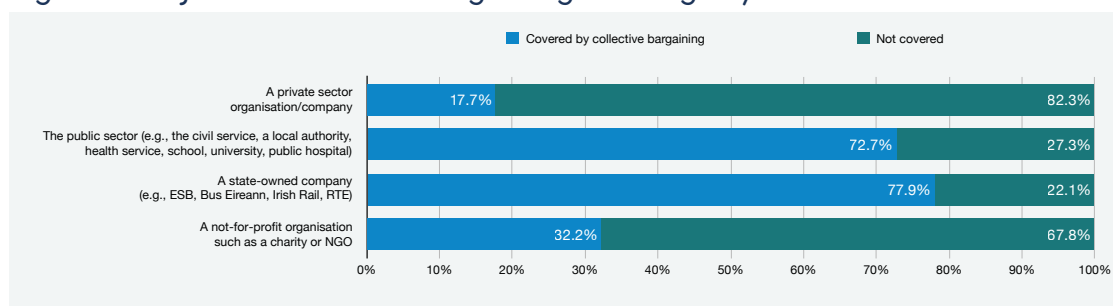
While the analysis above helps us to be more accurate in our estimations of the reach of collective bargaining and its coverage, a task of more significance and importance is to measure the trends in collective bargaining coverage over time. Luckily, we are in a position to do this by drawing on survey data over a period of 22 years. To aid comparability we return to using our unadjusted measure of collective bargaining coverage. WIIS's two (unadjusted) estimates of the coverage of collective bargaining – 40% in 2025 and 43% in 2021 – represent a decline on the previous estimates as derived by similar means from *The Changing Workplace Survey* – 48% in 2009 (O'Connell et al., 2010) and 53% in 2003 (O'Connell et al., 2004)⁹. This continual decline in the reach of collective bargaining over the past 22 years is perhaps not surprising and mirrors the decline in union density over the same period, which in 2003 was 38%, and in 2009 was 32% (See the line graph).

In an attempt to see which workers are covered by collective agreements we looked at variations across broad sectoral categories. The results - the adjusted estimates - are reported in Figure 18 below. They show high levels of coverage for workers employed in state-owned companies (78%) and in the public sector (73%), and considerably less in not-for-profit organisations (32%) and in the private sector (18%).

Not surprisingly, too, collective bargaining coverage is associated with workplace size, the larger the workplace the more likely its employees' terms and conditions of employment are covered by collective agreements. See Figure 19 overleaf.

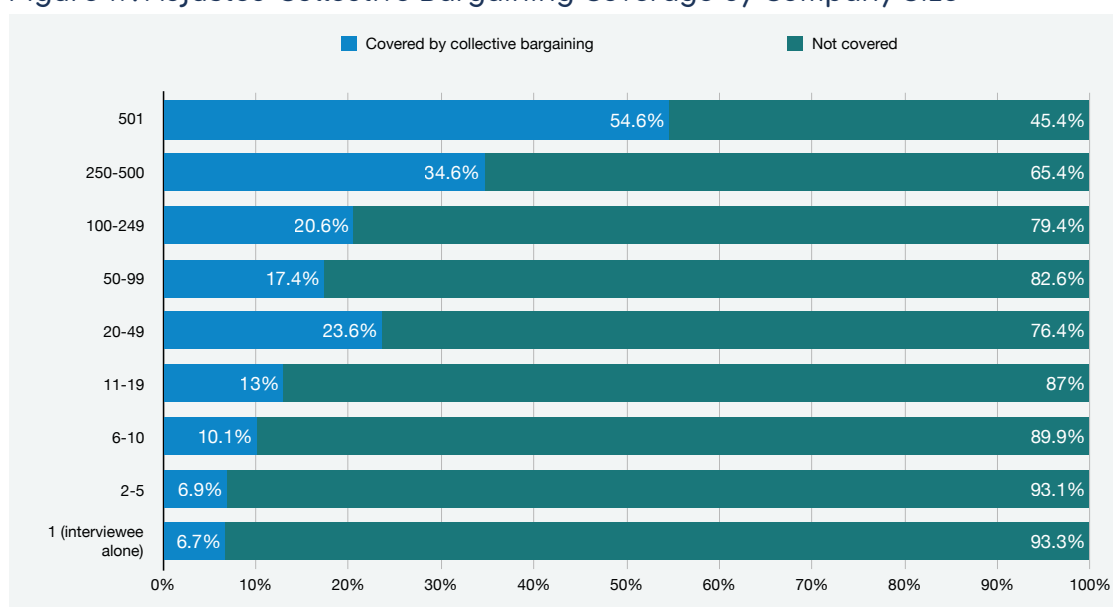
Collective bargaining coverage is also associated with workers' educational qualifications. The higher the level of educational attainment achieved by a person the more likely they are to be working in a workplace where there is a collective agreement. For instance, over

Figure 18: Adjusted Collective Bargaining Coverage by General Sector



N = 2,694

Figure 19: Adjusted Collective Bargaining Coverage by Company Size



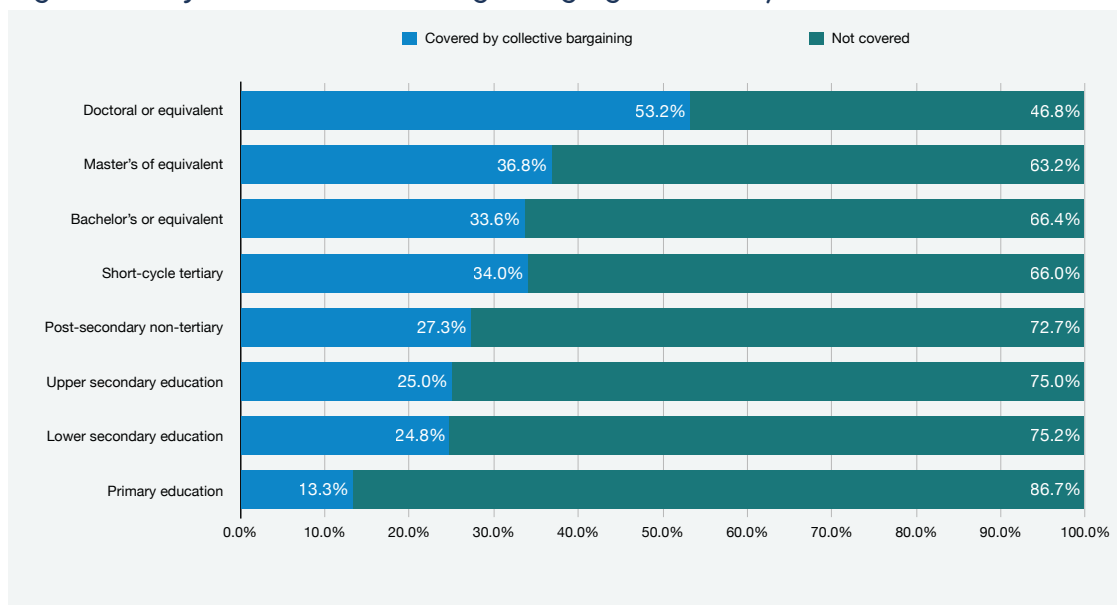
N = 2,497

one in two employees with a PhD and almost 36% of those with a Master's degree are covered by a collective agreement. That compares with quarter of those with a secondary level educational qualification and a little over 13% who did not go beyond a primary education. See Figure 20 below.

Before concluding our discussion in this section of the report we look briefly at collective bargaining coverage across the three cohorts of workers identified earlier, they being union members, former union members

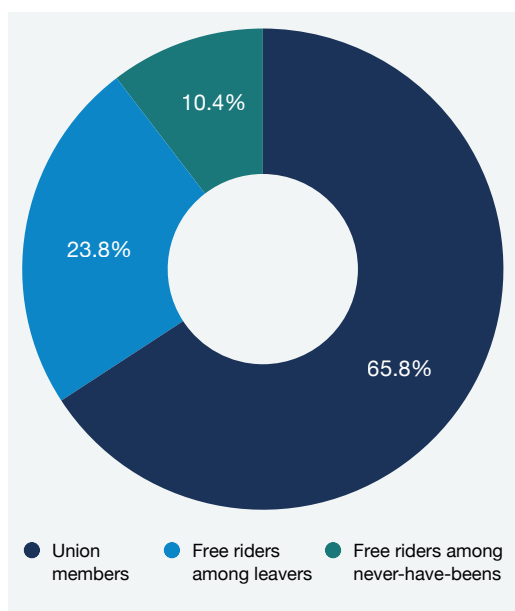
(leavers) and never-have-been union members. See Figure 21. With the latter two categories we only include those who reported that the option of their being able to join a union in their organisations is available to them. To repeat we identify these workers as free-riders. We find that a third of employees covered by collective bargaining agreements are union free-riders and of these, one third are employees who have been union members in the past (leavers) and the remainder have never been union members.

Figure 20: Adjusted Collective Bargaining Agreement by Education Level



N = 3,007

Figure 21: Collective bargaining coverage among union members and free-riders in Ireland



N = 990

Union influence

Finally, while estimates of union density and the coverage of collective bargaining provide a good indication of the role and importance of trade unions, they do not give any direct estimation of the outcome of collective negotiations. In an attempt to address this issue, we enquired of our respondents of the level of influence they perceived unions exercised at workplace level over a range of items. The question was asked of those working in organisations where management recognised unions for the purposes of collective bargaining.

The issues explored included: employees' terms and conditions of employment (pay, working hours, etc.), the adoption of flexible working conditions, and the organisation of work. The results are reported in the table 2 below. Of the three items measured, union influence is seen to be greatest in respect of employees'

Table 2: Respondents' Perception of Trade Union Influence at Workplace Level, 2025 (2021 results in parentheses)

	A high level of influence	A moderate level of influence	A low level of influence	None at all
Terms and conditions of employment (pay, working hours, etc.)	31% (22%)	38% (41%)	19% (22%)	13% (15%)
The adoption of flexible working conditions	18% (17%)	35% (39%)	26% (24%)	21% (20%)
The way work is organised	13% (11%)	33% (30%)	28% (32%)	25% (27%)

terms and conditions of employment where over two thirds (69%) of respondents believe unions exercise at least a high (31%) or a moderate level of influence (38%). This represents an increase on the 2021 figure of 63%. Union influence is perceived to be considerable, too, in regard to the adoption of flexible working conditions where 53% believe it to be either high (18%) or moderate (35%). In 2021, it was 56%. Union influence is seen to be less in respect of the third item – the organisation of work – with almost 46% indicating that unions exercise a high (13%) or a moderate (33%) level of influence albeit it represents an increase on that recorded in 2021 when it was 41%. All in all, then, union influence is seen to have increased or held up well across a spectrum of areas over the last four years.

We also investigated if perceptions of union effectiveness varied across different sectors. Workers in the public sector and semi-state sector tend to rate union influence more highly than those employed in other sectors across all three areas. See the data reported in Table 3.

We were also interested to see if there was any difference in view between union members, union free-riders and former union members in their estimation of union influence in their workplaces. The results are reported below in Table 4. A greater proportion of union members are found to be positive in their appraisal of union influence over all but one area, that of the adoption of flexible working conditions. More free-riders and former union members rate unions favourably here.

Table 3: Proportion of Workers who Rate Trade Union Influence as being high or moderate at Workplace Level in Different Sectors, 2025 (N in parentheses)

	Private sector	Public sector	Semi-state sector	Not-for-profit sector
Terms and conditions of employment (pay, working hours, etc.)	61% (214)	73% (417)	74% (45)	68% (19)
The adoption of flexible working conditions	45% (156)	57% (317)	66% (41)	39% (11)
The way work is organised	42% (149)	50% (287)	48% (29)	38% (11)

Table 4: Proportion of Union Members, Free-Riders and Former Union Members who Rate Trade Union Influence at Workplace Level to be either High or Moderate, 2025 (N in parentheses)

	Union Members	Free-riders	Former Union Members
Terms and conditions of employment (pay, working hours, etc.)	76% (638)	59% (290)	60% (111)
The adoption of flexible working conditions	53% (623)	57% (288)	55% (111)
The way work is organised	51% (633)	43% (296)	43% (114)

The added-value of trade unions

Here, we look at three aspects by which unions might be said to add value: first, through skill acquisition and training; second, through staff's willingness to expend discretionary effort; and third, through the direct benefits that accrue to union members from the presence of particular HR policies.

With respect to training and skills, we anticipated from the existing literature that there would be an association between union presence and training provision (Bryson and Forth, 2016). The reasons are well-rehearsed: training and enhanced skill provision provides employers with a means to off-set any union wage premium there may exist. Union presence is also seen to reduce voluntary quits, thus raising worker tenure. This creates a further incentive for firms to invest in their workers' human capital. For employees, there is the prospect and benefit that the training and skill acquisition which unions seek for their members are not solely firm-specific but are likely to be transferable across the labour market. Investment in employee training also benefits the employer and the union in its signalling effect that both parties have a shared objective in investing in employees' future job prosperity and

employment security. We thus expect that union presence would be associated with considerable training provision.

Training provision and trade union presence

Here, we look at whether there are links between the presence of trade unions in the workplace and the extent and form of training undertaken by employees. The findings from WIIS 2 indicate that there is such an association. See Table 5. First, considerably more employees in unionised firms report that they receive off- or on-the-job training in comparison to workers in non-unionised organisations. Second, off-the-job training, of all durations - from a few hours to over a year - is significantly more pronounced among workers in unionised enterprises. Any differences in the form of the off-the job training provided - be it mostly related to their current job and to equip with skills needed in the future - are slight but favour workers in unionised organisations. Third, with respect to on-the-job training, too, as many or more employees in unionised workplaces report that they receive this form of training.

Table 5: Training in unionised and non-unionised organisations

	Off-the-job Training		On-the-job Training	
	Unionised workplaces	Non-union workplaces	Unionised workplaces	Non-union workplaces
No training	49.2%	64.3%	21%	27.4%
A few hours up to 1 week	32%	22.6%	49%	42.2%
More than a week and up to 3 months	13.3%	8.7%	24.3%	24.2%
More than 3 months and up to 1 year	3.1%	2.9%	3.8%	4.2%
More than 1 year	2.3%	1.5%	1.8%	2%
N	2655		2639	
<i>Was that off-the-job training</i>				
... mostly related to a job you currently undertake	29.4%	27.8%		
... to equip you with skills you may need in the future	7.1%	5.7%		
... or both	63.5%	66.5%		
N	1112			

Union presence and employee's willingness to expend discretionary effort

In Table 6 below we present results in respect of whether workers in unionised enterprises are more likely to report that they expend extra effort in their work than are workers

in non-union enterprises, as well as whether they are more likely to leave their current employer. The differences are small with the vast majority of workers in both types of workplaces likely to make suggestions to improve the efficiency with which work is carried out in their organisation and their willingness to work harder than

Table 6: Employee attitudes towards efficiency improvements, willingness to increase work effort and intention to quit

	Unionised workplaces	Non-union workplaces	N
I am willing to make suggestions to improve the efficiency with which work is carried out in this organisation	84.7%	87.6%	2710
I am willing to work harder than I have to in order to help this organisation succeed	82.6%	82.7%	2709
I am likely to look for a new job with a different company or organisation in the next year.	18.4%	29.5%	2710

Table 7: Benefits in unionised and non-unionised organisations

	Unionised workplaces	Non-union workplaces	N
An occupational or company pension to which your employer contributes	81.9%	55.1%	2710
Paid holidays	96.4%	93.5%	2709
Paid sick leave/sick pay	93.8%	83.2%	2710
Private medical insurance coverage	29.1%	40.7%	2711
Access to menopausal supports or accommodation*	27.5%	19.7%	1345
Access to menstrual supports or accommodation*	26.4%	23.7%	1343
Paid maternity leave that goes beyond the statutory paid requirements*	53.9%	40.2%	1344

Note: * asked only of female respondents

they have to in order to help the organisation succeed. Employees in non-union companies are however significantly more likely to indicate that they intend to quit their job in the next year.

Benefits provided to union members

We also looked at the availability of additional benefits provided to workers by their employers. Results are reported in Table 7. Workers in unionised companies are considerably more likely to have an occupational/company pension than are workers in non-union companies.¹⁰ They are also more likely to be afforded paid sick leave.¹¹ Non-unionised workers are more likely, however, to report that their employer provides private medical insurance. There is little difference in the provision of paid holidays.

We also examine the availability of specific supports provided to female employees. Here, we found that female workers employed in unionised enterprises were considerably more likely to be provided with menopausal and menstrual supports or accommodation than female workers in non-unionised organisations. They were also more likely to be provided with paid maternity leave that goes beyond the statutory paid requirements.

Conclusion

Recent decades have witnessed dramatic declines in Irish trade union density, with density falling from around 60% in the mid-1980s to around a quarter of the workforce now. This raises critical questions for workers' orientations towards unions and for the future long-term viability and strength of union organisation.

As bleak as this picture might be, findings from the Working in Ireland Survey 2025 indicate there is little evidence of there being a widespread disaffection with, or alienation from, trade unions. Rather, union members' commitment to union membership remains robust. So, too, do many non-members see the value in union representation, to the extent that, if afforded the opportunity to have union representation, they would choose to have it.

This finding is critically important for trade unions as it suggests that the continuing decline in union density is due not to workers' predisposition towards unions but is due rather, at least in part, to structural contexts within which employees are employed. This is not necessarily associated with shifts in the class structure and the sectoral composition of employment – higher educated and well-paid workers are among the most likely to be union members. Rather what appears crucial are employers' postures towards trade unions. Where employers accept unions and are willing to engage in collective bargaining with them, as in the public sector and in parts of manufacturing, unions tend to thrive. Where employers are not prepared to work with them and facilitate union representation, workers tend not to join unions. Furthermore, while former union members may sometimes be disenchanted with trade union representation, this is a minor influence.

If then employer policy is a key determinant in shaping union membership and representation, the future role of unions will depend in large part on government policies. Recent initiatives by the State, such as the establishment of the High Level Working Group on Collective Bargaining, promised much, but at the time of writing have delivered little on the ground for unions and for those workers who seek union representation. Much store is placed on the Adequate Minimum Wages Directive and the Irish Government's attendant Action Plan. However, the State has remained extremely cautious and tentative in responding to the requirements of the AMWD. At the time of writing (May 2026) it has not, in its formulation of an Action Plan to Promote Collective Bargaining, which is a requirement under the AMWD, adopted any measures intended to make legislative or structural changes to collective bargaining arrangements. Under the terms of the Directive it is quite within its rights not to do so, but its response, at least as portrayed by one informed observer, is cast as a minimalist transposition of the Directive (Müller, 2025).

It is not that the Government's Action Plan does not contain some potential benefits for unions, it does, and we detail these in the report. However significant obstacles remain, most notably in respect of union representatives' (physical or digital) access to workers

and/or their workplaces, where the employer has not already ceded union recognition. It is hard to foresee how employers who are hostile or indeed simply ambivalent to union representation might be prepared voluntarily to cede access to union organisers to their employees or workplaces. And second, in that context, if employees themselves seek to organise their work colleagues, they risk exposing themselves to intimidation and victimisation.

In sum, then, bound by these constraints and others which we document in the report it is difficult to foresee how the trade union movement might avail of any current State initiative to substantially increase their membership and the reach of collective bargaining

The future of unions depends too on unions themselves and their capacities and skills to organise workers. There is low-hanging fruit, particularly the significant numbers of workers in already unionised organisations who benefit from union representation but who themselves do not join unions. Organising other workers in non-union organisations presents a substantially greater challenge and will surely test unions' ability to organise in an otherwise more hostile context.

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Endnotes

- 1 See Final Report of the LEEF High Level Working Group on Collective Bargaining, pp. 20-23.
- 2 Deputy Simon Coveney, Minister for Enterprise, Trade and Employment, Transcript of a Dáil Debate, 8/02/2024. Accessed at <https://www.oireachtas.ie/en/debates/question/2024-02-08/1/>
- 3 Item 6 in the Action Plan does indicate this matter will be looked at, but the wording – “Conduct exploratory research, including a Regulatory Impact Assessment and SME test, regarding the potential of the introduction of a pilot to include collectively bargained agreements as a weighting in a public procurement project” – is so knotty and tentative as to suggest such a provision is unlikely to materialise, at least, any time soon. The timeline specified for the project – to commence Q3 2026 and to be ready by Q3 2029 – would further reinforce this view.
- 4 The inverted commas in this sentence are deliberate; these terms were used in the HLWG’s report and are used here to emphasise a potential outcome of the Action Plan.
- 5 Judgment of the Court in Case C-19/23 | Denmark v Parliament and Council (Adequate minimum wages)
Accessible at: <https://curia.europa.eu/juris/documents.jsf?num=C-19/23>
- 6 The WIIS only includes workers aged 16 years and over. The LFS, by contrast, includes employees aged 15 years and over.
- 7 These include Employment Regulation Orders (EROs), Registered Employment Agreements (REAs), and Sectoral Employment Orders (SEOs). EROs are established by Joint Labour Committees involving employer and union representatives and are given legal effect by the Labour Court. They set minimum rates of pay and conditions of employment for workers in particular sectors, such as contract cleaning, security, and the childcare and early learning sector. Employers in those sectors are then obliged to pay wage rates and provide conditions of employment not less favourable than those prescribed. An REA is a collective agreement that involves a trade union or unions and an employer, or group of employers or an employers’ organisation, where the agreement, registered with the Labour Court, is binding only on the parties to the agreement. They are few in number and most relate to particular companies and only in one instance – involving the overhead powerline industry – does the REA refer to an entire sector. An SEO establishes a legally binding floor on rates of pay and conditions of employment across a sector, most notably the construction sector.
- 8 The OECD reported the coverage of collective bargaining to be 34% in Ireland in 2017. It has not updated it since. Its figure relies on estimates provided by Professor Jelle Visser that are derived from various heterogeneous sources.
- 9 These latter two estimates for 2003 and 2009 were obtained from estimates of the proportion of employees who were employed in workplaces where there was a union presence.

- 10 Since January 1st 2026, the government introduced new legislation in support of an auto-enrolment pension scheme for employees. Employees are automatically enrolled into the scheme if they earn more than €20,000 per annum, are aged between 23 and 60 years, and are not paying into a pension through payroll.
- 11 Since January 1st 2024, employees have a legal right to 5 days sick pay per annum. The legal minimum requires an employer to pay 70% of an employees normal pay to a maximum of €110 a day.

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