

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Gas sector



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Country codes

AT	Austria	ES	Spain	LV	Latvia
BE	Belgium	FI	Finland	MT	Malta
BG	Bulgaria	FR	France	NL	Netherlands
CY	Cyprus	HR	Croatia	PL	Poland
CZ	Czechia	HU	Hungary	PT	Portugal
DE	Germany	IE	Ireland	RO	Romania
DK	Denmark	IT	Italy	SE	Sweden
EE	Estonia	LT	Lithuania	SI	Slovenia
EL	Greece	LU	Luxembourg	SK	Slovakia

Introduction

The aim of this representativeness study is to identify the relevant national social partners – that is, the trade unions and employer organisations – in the gas sector, and to show how they relate to the sector's European-level organisations representing employees and employers. The report is divided into three parts: an overview of the specificities and the employment trends in the gas sector; an analysis of the social partner organisations in all of the 27 EU Member States; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

In this section, the objectives of the study are presented along with a brief introduction to the chosen methodology. The context of this study is the European sector social dialogue committee (ESSDC) for the gas sector, which provides an assessment of the representativeness of the European social partner organisations – the European Federation of Public Service Unions (EPSU), the IndustriAll European Trade Union (IndustriAll Europe) and the European Union of the Natural Gas Industry (Eurogas).

0.1. ESSDC for the gas sector

The ESSDC for the gas sector was established in 2007, with a view to providing a forum to discuss the various challenges facing the industry, from the creation of the EU energy market to climate change and the energy transition. The social partner organisations participating in the committee are IndustriAll Europe, EPSU and, on the employers' side, Eurogas.

In the initial period, from 2007 to 2012, the focus of the ESSDC for the gas sector was on liberalisation and European energy policy initiatives, and their impact on the workforce and companies in the sector. After having been dormant since 2012, the ESSDC for the gas sector was restarted in October 2019, with a new focus on the role of gas in a decarbonised European economy, and the impact of the energy transition on workers in the European gas industry.

The activities of the ESSDC have focused on the transformation of the sector, by demanding a more in-depth analysis of the EU energy directives on the gas industry that goes beyond their general impact on the energy sector or on the electricity industry in particular. The toolkit on demographic management provided an analysis of the age profile of the gas sector and the main challenges posed by an ageing workforce, among which updating older workers' skills and the transfer of knowledge to younger cohorts appeared particularly prominent. The toolkit promotes the adoption of a comprehensive approach to age management and proposes ways to integrate age management into social dialogue, with a special focus on training and skill development and investing in creating a learning organisation.

The two latest documents produced by the ESSDC focus on the energy and climate transition. In 2011, the joint opinion on the Energy Roadmap 2050 (European Commission, 2011) aimed to proactively contribute to EU policies. The opinion underlined the importance of fully taking into consideration 'the profound changes in the energy industry and the impact on the companies, employment and working conditions' and integrating the social dimension by indicating the ways to implement a 'just transition process'. In particular, the sectoral social partners stressed the importance of social dialogue at company, national and European levels to anticipate and manage change. They also demanded to be consulted, at an early stage, on the work of the European

Commission when there are implications for the gas companies and their employees, in order to consider the social implications of proposals. They also stressed the need for social partners to have a stronger role in impact assessments.

In 2020, when reflecting on the economic and social impact of the COVID-19 pandemic, the European social partners in the gas sector jointly reaffirmed their commitment to the transition to decarbonised and renewable gases and providing quality employment with the joint statement on Just Transition (European social partners, 2020). They stressed the importance of ensuring a just transition to guarantee high-quality jobs and redirect the efforts towards recovery from the COVID-19 crisis to support the energy transition. By recalling the ILO's 2015 just transition guidelines (ILO, 2015), the European social partners stress the need to mainstream sustainability; develop solidarity mechanisms to support the sectors and regions most affected by the transition, including adequate social protection and training for affected workers; implement rigorous impact assessments of the long-term strategies to achieve carbon neutrality by 2050; and ensure effective social dialogue, strong collective bargaining and the participation of social partners to contribute to designing the long-term strategies needed to anticipate changes at all levels. The European social partners declared their commitment to shaping the sectoral transition and analysing the challenges and the needs of the gas sector and its workforce, while supporting the production and integration of renewable and decarbonised gases.

In the first period of its existence, from 2007 to 2012, the ESSDC produced five jointly agreed texts. After its revival in October 2019, one new joint text was agreed upon in 2020. This occurred in the context of the COVID-19 pandemic, which challenged the ESSDC process and the capacity to negotiate in a virtual environment based on tools that were not always adapted to the virtual context. An overview of these texts and a detailed analysis of the capacity of the European social partner organisations in the gas sector to negotiate can be found in Chapter 3 of this study.

In the first chapter, the workforce and companies represented in the ESSDC for the gas sector are presented. The second chapter analyses how the national trade unions and employer organisations are representing the workers and companies in their countries. The representativeness of the European social partners thus depends upon the membership strength of the affiliated national trade unions and employer organisations, and on their capacity to negotiate on behalf of them.

0.2. Objectives of the study

Representativeness studies are conducted for four reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is a criterion to be eligible for setting up an ESSDC, or for participation in one.
- Representativeness also means having the capacity to negotiate agreements that can lead to an implementation by Council decision as provided by Article 155 of the TFEU.
- This study can also offer guidance for future capacity-building initiatives.

Representativeness is defined by the European Commission Decision on the establishment of Sectoral Social Dialogue Committees promoting the Dialogue between the social partners at

European level (98/500/EC) (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative EU social partner organisation. It must:

- relate to specific sectors or categories and be organised at European level
- consist of organisations that are themselves an integral and recognised part of countries' social partner structures and have the capacity to negotiate agreements, and are representative of several Member States
- have adequate structures to ensure its effective participation in the work of the sectoral social dialogue committees

To assess representativeness, this study first identifies the relevant national social partner organisations in the gas sector, before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both national and European levels. The study includes only organisations whose membership domain is classed as 'sector-related', that is, trade unions and employer associations that have members in the sector and are involved in sector-related collective bargaining and/or in consultations over sector-related policies. In terms of territorial coverage, the study includes 25 EU Member States. The EU Member States not included in this study are Cyprus and Malta, because they lack a fixed network for the distribution of gas.

0.3. Definitions and methodology

The methodology applied in this study is linked to the criteria identified in European Commission Decision 98/500/EC (European Commission, 1998): sector-relatedness, membership and organisational capacity. Each of these criteria will be defined successively here.

As far as **sector-relatedness** is concerned, the demarcation of the gas sector has been established as covering NACE (Rev. 2) code 35.2 (gas).¹ This includes three subsectors: manufacture of gas, distribution of gaseous fuels through mains and trade of gas. The sector covers the manufacture of gas for the purpose of gas supply by carbonation of coal, from by-products of agriculture or from waste, and the manufacture of gaseous fuels by purification, blending and other processes using gases of various types, including natural gas. It does not include the manufacture of industrial gases. Distribution and trade through mains (excluding long-distance transport by pipelines) are essential, so a distribution network infrastructure must be in place.

Table 1: Demarcation of the gas sector – NACE Rev. 2 code 35.2 (gas)

NACE 35.2	Gas
35.21	Manufacture of gas
35.22	Distribution of gaseous fuels through mains
35.23	Trade of gas through mains

Source: Eurostat, 2008

¹ Statistical Classification of Economic Activities in the European Community (NACE), Rev. 2 (2008). For the demarcation of a specific sector, reference is made to one or a set of NACE codes, usually at the most detailed level, four digits. In this case, a single three-digit NACE code has been used.

The membership domains of trade unions and employer organisations can strictly correspond to this demarcation of the sector, which is a type of sector-relatedness known as ‘congruence’. If the membership domain of an organisation goes beyond the gas sector as described here, that is called an ‘overlapping representational domain’. An organisation is ‘sectional’ if it covers a part of the gas sector and nothing else, whereas ‘sectional overlapping’ describes an organisation that covers part of the gas sector and organises other sectors too.

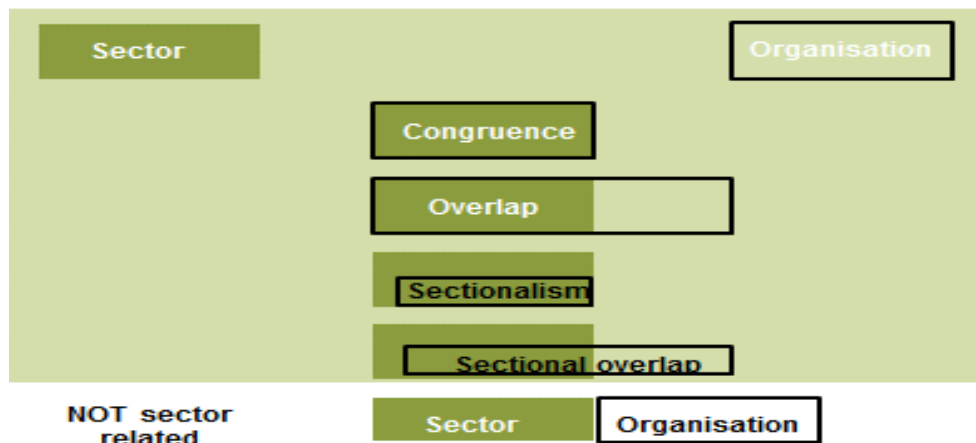
Table 2: Domain patterns of the membership of an organisation

Domain pattern	Domain of organisation in the sector	Domain of organisation outside the sector
	Does the domain of the union/employer organisation cover all employees/enterprises in the gas sector?	Does the union/employer organisation also represent employees/enterprises outside the gas sector?
Congruence (C)	Yes	No
Overlap (O)		Yes
Sectionalism (S)	No	No
Sectional overlap (SO)		Yes

Source: Network of Eurofound correspondents

Figure 1 presents the four different types of sector-relatedness graphically.

Figure 1: Four different types of sector-relatedness



Membership constitutes another important aspect of representativeness. Two dimensions of membership are to be looked at here: first, the geographical coverage of the EU-level organisations (in how many Member States does the EU-level trade union/employer organisation have affiliates?) and, second, the organisational density of the national affiliates. Moreover, it is also important to consider whether the EU-level players organise most of the national-level players, or at least the most significant ones, in terms of density and involvement in sector-related collective bargaining and/or policymaking.

The **organisational capacity** of the European social partners is analysed in terms of their ability to act on behalf of their members and to conclude binding agreements or commit to actions that can be implemented or monitored EU-wide through the support of their affiliates. For an assessment of the

capacity to negotiate, it is necessary to analyse the organisations: their institutional objectives and decision-making structures, as provided in their statutes; the expected outcomes of their actions, for instance whether their institutional mission includes the possibility of negotiating and coming to agreements with other parties; and the processes through which the organisations obtain a mandate, support and approval from their member organisations in the negotiation process.

The involvement of their members in national-level collective bargaining (or in social dialogue over sector-related policies) is important, as it shows that the affiliates have a mandate to negotiate on behalf of their members (at least at national level, which could then translate into a mandate to negotiate at EU level). Where a mandate for European negotiations is in place either implicitly or explicitly, it allows negotiations to take place at European level, which could potentially result in binding agreements or the drafting of European autonomous agreements, which require implementation by the social partners at national level, in line with their respective practices and traditions. The possibility of acting autonomously to implement EU-wide agreements is an important contribution to the effectiveness of the ESSDC.

Finally, representativeness also depends upon the structures, resources and capacity of the organisations to mobilise active participation of their members and aggregate different interests of member organisations, and on their ability to act autonomously at European level. Effective participation in the ESSDC meetings is assessed in terms of presence at the meetings of the ESSDC in the two-year period before the year of publication of this report (taking into account the COVID-19 context, when the ESSDC process took place in virtual environments with tools and procedures that did not always optimally support the capacity to negotiate). Internal structures within the European organisations to prepare ESSDC meetings and discuss social affairs can increase efficiency and ensure that more organisations feel represented than the ones that are directly participating in the meetings.²

0.4. Data collection and quality control measures

Representativeness studies combine a top-down and a bottom-up approach. The top-down approach includes all sector-related affiliates of the European associations IndustriAll Europe, EPSU and Eurogas, while the bottom-up approach looks for the organisations involved in gas sector-related collective bargaining and social dialogue in the EU Member States covered by this study and their membership of European-level organisations.

Unless noted otherwise, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates were provided rather than leaving a question blank. Thus, quantitative data (for example, to calculate the density rates) may stem from three sources, namely:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the respective organisations
- estimates, expert opinions and assessments made by Eurofound national correspondents or by representatives of the respective organisations

² More information on definitions of key terms can be found in Eurofound's *European Industrial Relations Dictionary*, available at <https://www.eurofound.europa.eu/observatories/eurwork/industrial-relations-dictionary>

Other sources used in this report include the European Commission's Social dialogue texts database and the articles of associations of the EU-level organisations.

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of preparing this study.

First, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents, between May 2020 and August 2020. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise them between September and December 2020.

An overview of the information in this study was made available to the European social partners at the end of January 2022 to allow their affiliates to double-check and comment in February 2022. This was a first informal (pre-evaluation) consultation. With their comments as guidance, the draft report was finalised and prepared for evaluation by the Eurofound Industrial Relations Advisory Committee and the European-level sectoral social partners identified in the report.

All relevant actors and organisations mentioned in this report have been invited to check the consistency of the information in this report, to ensure that the bottom-up approach included all the relevant sector-related organisations from their countries. As different social partner organisations can consider the information reported on other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information on other organisations representing similar memberships, this process involves an element of mutual control and recognition.

Finally, this report was evaluated and approved between mid-April and mid-May 2022 by the Eurofound Advisory Committee on Industrial Relations, which consists of representatives of both sides of industry, governments and the European Commission, with the addition of the European-level sectoral social partners identified in the report. After this formal evaluation, the report was edited and prepared for publication in the second half of 2022.

0.5. Structure of the report

The report consists of three main parts, beginning with a brief summary of the background and specificities of the gas sector. It then analyses the relevant social partner organisations in 25 of the 27 EU Member States (Cyprus and Malta are excluded from this study because they have no fixed gas distribution system). Chapter 3 considers the representative associations at European level.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not decide on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in European social dialogue. The information and analyses provided in this report provides the evidence base for further efforts and decisions by the social partners themselves and the European Commission.

1. Employment specificities of the sector

The gas sector employed some 120,000 workers in 2018 in the EU27 (excluding Cyprus and Malta), according to Eurostat data (Table 3). Cyprus and Malta are excluded in this study, as there are no gas sector activities recorded in these countries.

The three subsectors of manufacture, distribution and trade in gas are rather heterogeneous in terms of their employment structures. The manufacture of gas involves the majority of enterprises (74.7%) but smaller shares of workers (7.4%) and employees (5.0%). The average enterprise size is three workers. This is because the sector includes many small businesses, mostly agriculture firms in the biogas sector. Almost 90% of firms and workers in the manufacture of gas are concentrated in Germany, so it is possible to speak of a national specificity (which emerged in the latest revision of the national data series in 2018). In the other 24 countries covered by this study, this subsector has 465 firms and some 1,400 workers overall.

Distribution and trade are similar in size and structure. The numbers of enterprises in 2018 were 630 in distribution and 737 in trade, while the workforces were around 70,000 and 77,000 respectively. The average firm size was slightly higher in distribution (111 workers) than in trade (105 workers).

Gas sector employment is highly concentrated in a small number of countries. The six largest workforces alone (Germany 21%, Poland 16.5%, Italy 16%, France 13.5%, Romania 8% and the Netherlands 6.5%) amounted in 2018 to some 82% of the overall EU workforce. Among them, Germany has the largest number of persons working in the gas sector, 25,344, and the Netherlands the smallest, about 8,000.

Table 3: The gas sector in the EU – enterprises, workers, employees, 2018

Country	Enterprises				Workers				Employees			
	NACE 35.2	NACE 35.21	NACE 35.22	NACE 35.23	NACE 35.2	NACE 35.21	NACE 35.22	NACE 35.23	NACE 35.2	NACE 35.21	NACE 35.22	NACE 35.23
EU27 ^a	5,137	3,764	582	683	110,060	11,261	44,190	28,164	105,522	7,278	44,030	27,951
EU27 minus DE	1,470	347	462	553	84,716	937	37,812	19,522	84,190	846	37,715	19,366
AT	37	9	8	20	1,672			734	1,659			731
BE	10				215				211			
BG	31		21		922		787		900		773	
CY												
CZ	53				2,321				2,263			
DE	3,667	3,417	120	130	25,344	10,324	6,378	8,642	21,332	6,432	6,315	8,585
DK	100	74	17	9	941		515		936		514	
EE	27	4	7	16	246				237			
EL	10			0	385			0	382			0
ES	63	7	39	17	4,538	101	2,366	2,071	4,516	98	2,355	2,064
FI	21	17	2	2	72	38			69	35		
FR ^b	158	101	19	38	16,133	13	9,637	6,483	16,132	12	9,637	6,483
HR	67	0	50	17	1,925	0	1,747	178	1,910	0	1,735	175

Representativeness of the European social partner organisations: Gas sector

Country	Enterprises				Workers				Employees			
	NACE 35.2	NACE 35.21	NACE 35.22	NACE 35.23	NACE 35.2	NACE 35.21	NACE 35.22	NACE 35.23	NACE 35.2	NACE 35.21	NACE 35.22	NACE 35.23
HU	51	9	4	38	3,074	17	1,189	1,868	3,050	14	1,182	1,854
IE					1,500 ^c				1,400 ^c			
IT	500	42	174	284	18,914	263	12,589	6,062	18,720	227	12,551	5,942
LT	12	4	1	7	80			58	80			58
LU	6	4	1	1	100 ^c				100 ^c			
LV	10	2	3	5	1,070	5	908	157	1,058	5	896	157
MT												
NL	17				8,000 ^c							
PL	105	22	39	44	19,568	95			19,497	82		
PT	35	2	19	14	737			135	726			130
RO	87	9	44	34	9,311	202	8,074	1,035	9,306	202	8,072	1,032
SE	50	40	8	2	354	203			306	171		
SI	7	1	6	0	141			0	139			0
SK	13			5	2,097			741	2,093			740

Notes: Empty cells indicate no data available, often for confidentiality reasons (small numbers); this also explains why numbers may not add up to the totals at subsector level. ^a Since Cyprus and Malta do not have a domestic gas network industry, EU27 corresponds to the 25 countries covered by this study. ^b 2015. ^c Estimates provided by national experts.

Source: Eurostat, 2020

Besides the six EU countries with 8,000 employees or more in the sector, there is a second group where the sectoral workforce is between 2,000 and 5,000. This includes Czechia, Hungary, Slovakia and Spain. A third group is formed of Austria, Bulgaria, Croatia, Denmark, Ireland, Latvia and Portugal, where the sectoral workforce varies between 700 and 1,999. Finally, a fourth group has a gas sectoral workforce below 500 per country, in Belgium, Estonia, Finland, Greece, Lithuania, Luxembourg, Slovenia and Sweden. These rather small numbers of workers in the sector, in some of these countries, have several consequences for this study. First, they need to be taken into consideration when assessing the industrial relations landscape of the sector and the representativeness of the bodies. Second, the fact that numbers are small emphasises the differences, and hindered the data collection and availability of statistical data.

Indeed, the sector structure is rather diversified between countries. Since the sector is often small at national level, in many cases data are considered confidential and therefore are not available for the subsectors. Complete data on the number of employees by subsectors are available for eight countries (Croatia, France, Germany, Hungary, Italy, Latvia, Romania, Spain). Germany is exceptional, with 41% of employment in the sector in manufacturing of gas, 34% in trade and the remaining 25% in distribution. As mentioned above, Germany is the only country with a significant share of employment in manufacturing. In the other countries it reaches some 2.0% maximum. Distribution often employs the largest share of the workforce, which is above 50% in Croatia, France, Italy, Latvia, Romania and Spain. The only exception is Hungary, where trade accounts for 60% of the overall sectoral workforce (Figure 2).

Only in Germany is 30% of the workforce in manufacture. In other EU countries this is less than 5%. The breakdown of the EU workforce between distribution and trade is roughly equal in the EU27 as a whole. In Bulgaria, Croatia, Latvia and Romania, about 85–90% of the sectoral workforce is in distribution, while in Hungary the balance is about 60% of the workforce in trade and 40% in distribution.

Figure 2: Employment in the gas subsectors in selected countries, 2018



Source: Eurostat, 2020

As part of the EU energy policy, the gas sector, together with the electricity sector, underwent liberalisation, which took place in three phases from the late 1990s until the early 2010s. It involved separating transmission and distribution from trade, with the liberalisation of the consumer market under a regulatory framework to promote competition. Typically, the transmission and distribution segments remained regulated under administrative monopolies. Liberalisation sometimes involved the privatisation of the former public operators and often their commercialisation. Nowadays, the market structure remains relatively concentrated in a small number of main operators, which usually include the former incumbents and a growing number of smaller commercial operators (Table 4).

According to an ILO study looking at the oil and gas sectors at global level, these sectors are considered to pay some of the world's higher wages (Graham, 2010). They have nevertheless been experiencing serious shortages of skilled labour, and working conditions remain challenging. Working conditions in these industries are also generally better than average, although there are areas that would benefit from improvement, including antisocial hours and a lack of family-friendliness. The pay rates commanded by oil and gas workers are likely to remain high; however, there are pockets of real exploitation and hardship, particularly for contract workers. Occupational safety and health are a continuing concern for the sector's workers and employers: in particular, the gap between operators' and contractors' safety performance. The same ILO study indicates that, at global level, trade unions are concerned that contract labour could undermine pay, conditions and employment – especially when the contracting takes place across national borders (Graham, 2010).

There is no information available on the numbers of workers employed by contractors in the gas sector in the EU. It can, however, be assumed that this practice exists and that, just as at global level, their working conditions could also draw the attention of the social partners within the EU.

Table 4: Natural gas market indicators, 2018

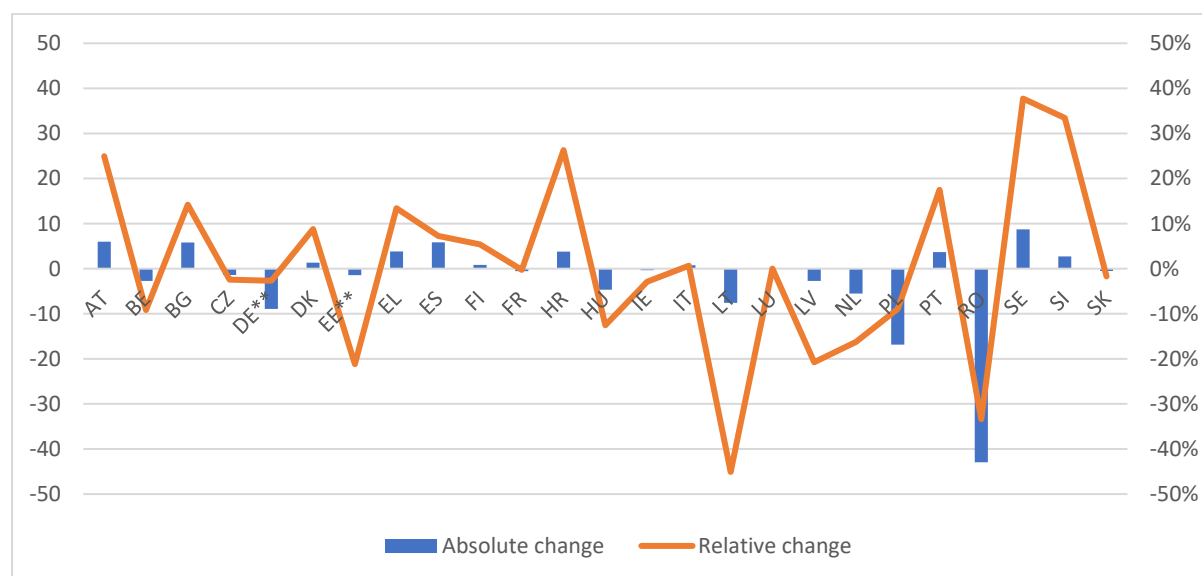
Country	Entities bringing gas into the country	Main entities bringing more than 5% of gas into the country	Cumulative market share, main entities (%)	Market share – largest manufacture and import company (%)	Entities retailing to final consumers	Main retailers, sales >5% of total	Cumulative market share, main retailers (%)	Market share, largest retailer (%)
AT	55	3	78		67	6	65	
BE	21	4	60	32	37	6	71	30
BG	4	1	99		19	2	92	
CZ	20	3	95	46	63	6	76	26
DE	25				990	4	27	
DK					14	4	93	
EE	1	1	100	100	37	1	90	90
EL	6	3	100	71	21	6	91	37
ES	31	5	77	43	73	5	76	39
FI	1	1	100	100	24	1	90	90
FR	35	3	80	55	74	5	67	37
HR	7	3	94	46	44	3	58	36
HU	48	5	76	34	27	3	67	55
IE	10	7	100	23	9	6	97	44
IT	64	3	83	54	412	4	44	19
LT	12	2	91	45	11	2	87	82
LU	5	2	98	78	9	4	98	39
LV	6	3	98	61	5	2	89	82
NL					48	4	67	
PL	36	1	89	89	106	2	87	44
PT	9	4	98	69	24	6	92	33
RO	23	2	84	43	80	6	86	25
SE*	1	1	100	100	7	7		
SI	5	3	97	73	23	6	92	50
SK	10	3	97	73	27	5	78	48

Notes: Empty cells indicate no data available. * 2016.

Source: DG Energy, Biannual energy statistical country datasheet (25 February 2021), https://ec.europa.eu/energy/sites/default/files/energy_statistical_countrydatasheets.xlsx

Across the EU27 there was a decline in the number of people employed in the gas sector between 2008 and 2018. Figure 3 presents the trends in employment from 2008 to 2018 for each of the 25 Member States covered (excluding Cyprus and Malta). It can be seen that, in absolute numbers, the decline in the sectoral workforce is largest in Romania and Poland (marked in blue in Figure 3). There are several countries where the blue bar is above the zero line, indicating an increase in sectoral employment between 2008 and 2018. The orange line indicates the proportions of the increases or decreases.

Figure 3: Employment in the gas subsectors in selected countries, 2008–2018

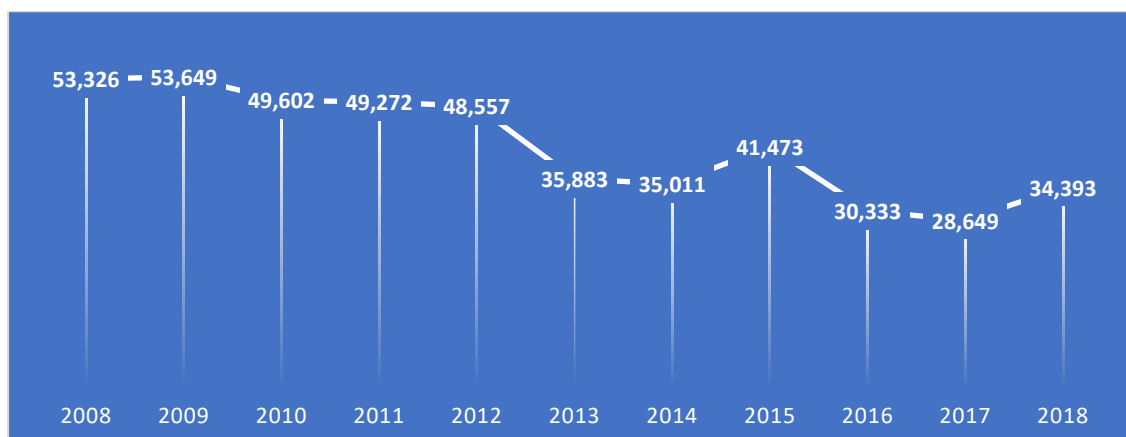


Source: Eurostat, EU-LFS

While the general trend indicates a slightly declining workforce in the gas sector between 2008 and 2018 at EU27 level, Figure 3 shows a variety of trends, combining decline in some countries with an increase in the sectoral workforce in some others. The sectoral workforce increased in many countries, such as Austria, Bulgaria, Croatia, Greece, Portugal, Slovenia, Spain and Sweden.

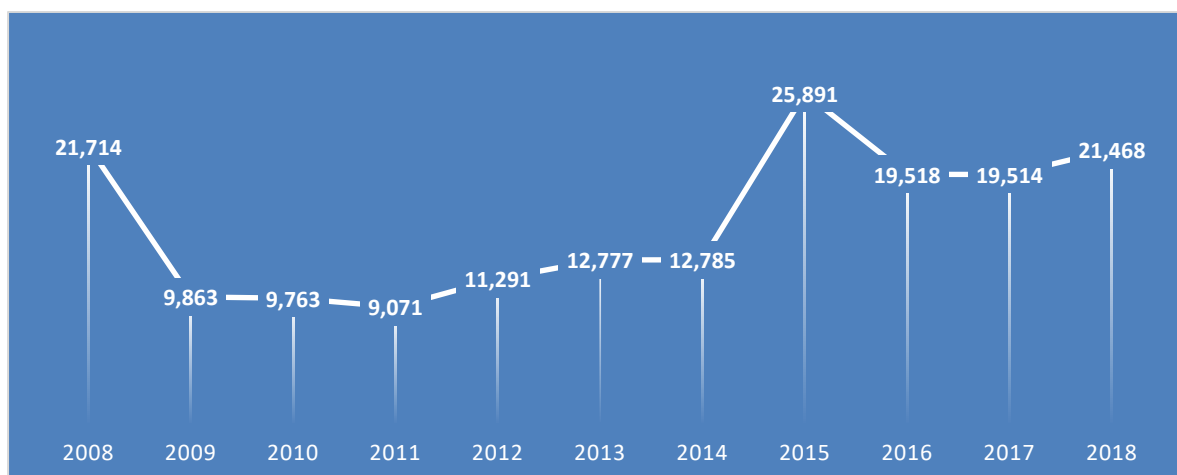
The gas sectoral workforce is found mostly in distribution (51–55%) and trade (32–35%) activities in gas. Only 10–15% of the workforce is to be found in manufacture and this is mainly in Germany, where about 91% of the employees in manufacture are employed. Therefore, the overall trend in persons employed (including only the numbers from the countries for which data are available, and therefore not complete) for the workforce in distribution activities is shown in Figure 4, while Figure 5 shows the workforce in the trade part of the sector.

Figure 4: Trend in the workforce in the distribution of gas, 2008–2018



Source: Eurostat, EU-LFS

Figure 5: Trend in the workforce in trade in gas, 2008–2018



Source: Eurostat, EU-LFS

In terms of employment and labour relations, the subsectors of distribution and trade are particularly important, because of their share in the overall workforce and the presence of larger enterprises. The influence of regulation and the presence of large operators, often originating from former monopolists, contribute to shaping an industrial relations landscape with relatively strong trade union representation and well-developed collective bargaining.

The impact of megatrends and COVID-19 on the gas sector has been explored based on a brief web search. In terms of the impact of **greening of the economy**, it is necessary to consider the role and potential of the gas sector in bridging temporary gaps in production of renewables, at times when there is not much wind or sun. Tichler and Zauner (2018) consider various scenarios in which fossil energy is replaced by other gases.

The energy transition has also had some impact on the representativeness of Eurogas. The beginning of concerted efforts towards the energy transition has seen diversification of Eurogas members. In recent years Eurogas has welcomed the electrolyser manufacturer ITM Power onto its board and has also signed digital players and biogas companies to its membership.

At the same time, traditional energy companies and gas distribution system operators remain very active in efforts to decarbonise and are working to help set an enabling policy framework. Overall, Eurogas is working to accelerate the energy transition, and wants to see ambitious and workable EU policies for decarbonisation of the gas sector and connected users. New skills are required to decarbonise gas networks. In regions where jobs could be lost in the process of the energy transition, Eurogas is keen to ensure reskilling and upskilling opportunities for those affected.

Digitalisation provides various opportunities for both distribution activities and trade in gas. With digitalisation, and better analyses of the available data, improvements in the settling of supply in line with the demand for gas are key for both distribution and trade activities in the sector. For the gas sector, this is crucial because competitiveness is based now on better margins rather than bigger production. Digitalisation gives an opportunity to collect, analyse and utilise the data for substantial improvement. Digital technologies are recognised as adding value to gas companies by helping reduce costs, speed up and improve decisions, and increase workforce productivity (Deloitte, 2017). There are also risks that jobs will be lost to digitalisation in for example, gas meter reading activities. Opportunities and new jobs may arise from the development of new technologies, for example in the company Kayrros, which has developed systems to manage value chain methane emissions using satellite data.

Regarding the impact of the **COVID-19** crisis on the gas sector, a first consequence was that gas and oil prices fell by 33%. Due to the global shutdown of economic activity, COVID-19 caused a historic drop in demand. This, combined with the price war between Russia and Saudi Arabia, contributed to an additional 18% decline in oil prices between March and May 2020 (Schneider and Schwartz, 2020). Nevertheless, in the second half of 2021, gas demand rose due to the increase in economic activity in other sectors. Geopolitical events outside the EU (for example in Moldova (BBC News, 2021), and in North Africa (Reuters, 2021)) have also affected the gas sector activities of a number of EU countries, and increased gas prices affected the sector in the second half of 2021. Due to the impact on citizens, governments in some Member States have recently considered measures regarding trade in and distribution of gas.

2. National level of interest representation

In the 25 countries covered by this representativeness study, the Network of Eurofound Correspondents identified 70 sector-related trade unions in 24 countries, and 28 sector-related employer and business associations in 16 countries (Table 5).

Table 5: Number of sector-related organisations per country, 2020

Number of sector-related organisations	Member States with this number of trade unions in the gas sector overall	Member States with this number of employer associations in the gas sector overall
0	EE	BG, EL, HR, HU, IE, LU, LV, PL, ³ PT
1	HU, LT, LV, SI, SK	AT, CZ, DK, EE, ES, FI, LT, SI, SK
2	BG, CZ, DE, LU, NL, RO	BE, FR, NL, RO, SE
3	AT, DK, IE, IT, PL	
4	BE, ES, FI, HR, SE	DE
5	PT	IT
6	EL	
7	FR	

Note: Cyprus and Malta were not included as they do not have a fixed gas distribution network.

Source: Network of Eurofound Correspondents

As shown in Table 5, only Estonia has no sector-related trade union. This means that no trade unions represent workers in the sector, engage in sector-related collective bargaining or participate in sector-related policy consultations. All the other 24 countries have at least one sector-related trade union. More than half of these countries have one to three trade union organisations in the gas sector, while eight countries have a more plural representational landscape. This latter group comprises countries where representation cleavages depend on ideological (France, Greece, Portugal) or territorial (Croatia) traditions, or both (Belgium and Spain). In others, representation is more based on occupational divides (Finland, Sweden).

On the side of employer or business associations, the picture looks different. In nine EU countries, gas enterprises are not organised: Bulgaria, Croatia, Greece, Hungary, Ireland, Latvia, Luxembourg, Poland and Portugal. This is sometimes due to the relatively high concentration of the industry in a few large firms, which often tend to bargain directly with their employees. The sectoral bargaining structure (see Section 2.4) is rather decentralised. The other countries usually have one or two enterprises (14 countries), whereas Germany and Italy have four and five associations respectively. In these last two countries, the employer segmentation reflects the organisation of the sector

³ In Poland, the Polish Confederation Lewiatan has one member active in the gas sector: the Polish Association of Private Energy Employers (ZPPE). ZPPE was not identified in the data collection stage of this report and is not included in the analysis.

around firms that historically were part of different groups of providers (public, private or municipal firms).

2.1. Gas sector coverage, sector-relatedness and organisational density of trade unions

Trade unions in the gas sector cover three different segments (manufacture, distribution and trade) to varying extents (Table 6). Of the 70 organisations for which the relevant information was available, 28 cover the whole sector, while 42 represent members in one or two subsectors.

Table 6: Sector coverage of the gas sector trade unions, 2020

Country	Organisation	35.21 Manufacture	35.22 Distri- bution	35.23 Trade	Public	Private	Domain	Organising electricity sector too
EU27	70 trade unions	31	62	51	34	59		
	In 24 of 25 Member States	13 Member States	23 Member States	23 Member States	18 Member States	23 Member States		
AT	GPA-djp	Yes	Yes	Yes	No	Yes	SO	
	PRO-GE	Yes	Yes	Yes	No	Yes	SO	
	younion	Yes	Yes	Yes	Yes	Yes	O	
BE	ACV-CSC BIE	Yes	Yes	Yes		Yes	O	
	ACLVB-CGSLB	Yes	Yes	Yes		Yes	O	
	ACV-CSC CNE	Yes	Yes	Yes		Yes	SO	
	Gazelco	Yes	Yes	Yes	No	Yes	O	
BG	НФТ “Химия и индустрия”	No	Yes	No	Yes	No	O	
	НФХ КТ Подкрепа	No	Yes	Yes	Yes	No	O	
CZ	OS UNIOS	No	Yes	Yes	Yes	Yes	O	
	SOSE	No	Yes	Yes	Yes	Yes	O	
DE	IGBCE	Yes	Yes	No	No	Yes	SO	
	ver.di	No	No	Yes	Yes	Yes	SO	
DK	Metal	n.d.	n.d.	n.d.	Yes	Yes	SO	
	3F	Yes	Yes	No	Yes	Yes	SO	
	IDA	Yes	Yes	Yes	Yes	Yes	SO	
EL	ΠΟΕ (ΠΟΕ) ⁴	No	Yes	Yes			O	

⁴ ΣΕΔΕΣΦΑ (Sedesfa), EDA Attikis, EDA Thessalonikis Thessalias, ΣΕΔΕΠΑ (Sedepa) and Zenith are all member organisations of the Panhellenic Energy Federation ΠΟΕ (POE).

Representativeness of the European social partner organisations: Gas sector

Country	Organisation	35.21 Manufacture	35.22 Distri- bution	35.23 Trade	Public	Private	Domain	Organising electricity sector too
	ΣΕΔΕΣΦΑ (Sedesfa)	No	Yes	No			S	
	EDA Attikis	No	Yes	No	Yes	No	S	
	EDA Thessalonikis Thessalias	No	Yes	No	No	Yes	S	
	ΣΕΔΕΠΑ (Sedepa)	No	No	Yes	Yes	No	S	
	Zenith	No	Yes	No	No	Yes	S	
ES	UGT-FICA	Yes	Yes	Yes	No	Yes	O	
	CCOO Industria	Yes	Yes	Yes	No	Yes	O	
	FI-USO	Yes	Yes	Yes	No	Yes	O	
	ELA	Yes	Yes	Yes	No	Yes	SO	
FI	JHL	No	Yes	No	No	Yes	SO	
	TEK	No	Yes	Yes	Yes	Yes	SO	
	Pro	n.d.	n.d.	n.d.			SO	
	YTN	No	Yes		No	Yes	SO	
FR	CFC-CEG Energies	Yes	Yes	Yes	No	Yes	SO	
	CFTC-CMTE	Yes	Yes	Yes		Yes	SO	
	FCE-CFDT	No	Yes	Yes		Yes	SO	
	FNEM-FO	Yes	Yes	Yes	No	Yes	SO	
	FNME-CGT	Yes	Yes	Yes	No	Yes	SO	
	UNSA Energie	Yes	Yes	Yes	No	Yes	SO	
	SUD Energies	No	Yes	Yes	No	Yes	SO	
HR	SING	No	Yes	Yes	Yes	Yes	SO	
	EKN	Yes	Yes	Yes	Yes	Yes	SO	
	SSKH	No	Yes	Yes	Yes	Yes	SO	
	SDPPTH	No	Yes	No	Yes	Yes	S	
HU	VDSZ	No	Yes	Yes	Yes	Yes	SO	
IE	SIPTU	No	Yes	Yes	Yes	Yes	O	
	Connect	No	Yes	No	Yes	No	SO	
	Unite	No	Yes	No	Yes	No	SO	
IT	Filctem-Cgil	No	Yes	Yes	Yes	Yes	SO	
	Femca-Cisl	Yes	Yes	Yes	Yes	Yes	O	

Representativeness of the European social partner organisations: Gas sector

Country	Organisation	35.21 Manufacture	35.22 Distri- bution	35.23 Trade	Public	Private	Domain	Organising electricity sector too
	Uiltec-Uil	Yes	Yes	Yes	Yes	Yes	O	
LT	LPPSF	No	Yes	Yes	Yes	Yes	SO	
LU	OGB-L	Yes	Yes	Yes	Yes	Yes	O	
	LCGB	Yes	Yes	Yes	Yes	Yes	O	
LV	LAKRS	No	Yes	Yes	No	Yes	SO	
NL	FNV Publiek Belang	No	Yes	Yes	No	Yes	O	
	CNV	No	Yes	Yes	No	Yes	O	
PL	SPCh NSZZ Solidarność	Yes	Yes	Yes	Yes	Yes	O	
	OZZGNG	Yes	Yes	Yes	Yes	Yes	C	
	PPZ Kadra	Yes	Yes	Yes	Yes	Yes	SO	
PT	Fiequimetal	No	Yes	Yes	No	Yes	SO	
	Sindel	No	Yes	Yes	No	Yes	SO	
	Fetese	No	Yes	Yes	No	Yes	SO	
	Sinergia	No	Yes	Yes	No	Yes	SO	
	ASOSI	No	Yes	Yes	No	Yes	SO	
RO	FS Gaz	Yes	Yes	Yes	Yes	Yes	SO	
	UFS Atlas	Yes	Yes	Yes	Yes	Yes	SO	
SE	Sveriges Ingenjörer	n.d.	n.d.	n.d.			SO	
	Unionen	Yes	Yes	No	No	Yes	SO	
	Seko	n.d.	n.d.	n.d.	Yes	Yes	SO	
	Ledarna	n.d.	n.d.	n.d.	Yes	Yes	SO	
SI	SDE	Yes	Yes	Yes	Yes	Yes	SO	
SK	POZ	Yes	Yes	Yes	Yes	Yes	C	

Notes: 'n.d.' indicates no data available; C, congruence; O, overlap; S, sectionalism; SO, sectional overlap. Due to concerns over the reliability and comparability of the data, information regarding the presence of social partner organisations in the public and private sectors and the ranking of organisations needs to be treated with caution. Colour coding: trade unions that also organise workers in the electricity sector are marked in dark blue in the column on the right; blank cells indicate that the trade union does not cover the relevant part of the sector/domain.

Source: Network of Eurofound Correspondents

Manufacture of gas is the segment least covered in the trade union membership, but this also depends on the marginal character of gas manufacture in the countries. Most of the manufacture reported in a number of countries was of biogas, but this is rarely connected to supply and therefore would mostly be substantially outside the scope of this study. In 2018, persons employed in the

manufacture of gas represented some 10% of the overall sector workforce (11,658 out of 116,130), but around 90% of them were recorded in Germany alone. Overall, the manufacture of gas is covered by 32 trade union organisations, while distribution and trade are covered by 63 and 52 trade unions respectively.

Trade unions in the gas sector cover public and private company workers to varying extents. The coverage of public sector workers is smaller than of private sector workers. Nearly all unions (58) cover private gas company workers, in 23 countries. In contrast, half of the trade unions (35) cover public gas company workers, in 18 countries. At the same time, due to concerns over the reliability and comparability of the data, information regarding the presence of social partner organisations in the public and private sectors and the ranking of organisations needs to be treated with caution.

The extent of the multisectoralism of trade union membership in the gas and electricity sectors is summarised in Table 7. In fact, 53 of the 70 gas sector trade unions (76%) also organise employees in the electricity sector, in 20 Member States. In 16 Member States, all the gas sector trade unions also organise electricity sector employees. This is the case in Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Hungary, Ireland, Lithuania, Luxembourg, the Netherlands, Portugal, Slovenia, Spain and Sweden. In four other countries, some but not all of the gas sector trade unions also organise electricity sector employees. This is the case in Croatia, Italy, Poland and Romania. In the remaining four Member States, gas sector trade unions only organise gas sector employees, without any involvement in the electricity sector. This is the case in Bulgaria, Greece, Latvia and Slovakia.

Table 7: Multisectoralism of gas sector trade unions that also organise electricity sector workers, 2020

Multisectoralism	Number of countries	Countries
All the gas sector trade unions also organise electricity sector employees	16	AT, BE, CZ, DE, DK, ES, FI, FR, HU, IE, LT, LU, NL, PT, SE, SI
Some, but not all, of the gas sector trade unions also organise electricity sector employees	4	HR, IT, PL, RO
Gas sector trade unions do not organise electricity sector employees	4	BG, EL, LV, SK

Source: *Network of Eurofound Correspondents*

Table 8 shows the organisational density in each country of the trade unions covered by this study. The presence of overlapping representation reduces the chance of obtaining data on sector-related membership, as larger trade unions may be unable to separate membership in the various economic activities they cover. However, the membership data have been collected for the majority, 43 sector-related trade unions out of the 70 (62%). With this word of caution, the available data suggest a trade union membership in the gas sector of more than 66,000 workers, 43% of the sectoral employment of the whole EU27. If we calculate the density for the 22 countries for which we have the membership data, it is around 50% (of a total workforce of 136,061, according to data provided by the Network of Eurofound Correspondents).

Due to the partial coverage of membership data and the substantial lack of information about France and Germany, which have some of the larger sectoral workforces in the EU, it is difficult to

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assess the overall level and the differences between countries and organisations. However, unionisation in the gas sector appears to be significant.

Table 8: Trade union organisational density in the gas sector, 2020

Country	Employees according to national correspondents	Employees according to Eurostat	Trade union members	Trade unions with data	Trade unions in total	Union density according to national correspondents (%)	Union density according to Eurostat (%)
AT	1,326	1,659	1,050	3	3	79	63
BE	1,000	211	320	1	4	32	No reliable data available
BG	900	900	966	2	2	Around 100	Around 100
CZ	5,900	2,263	3,005	2	2	51	No reliable data available
DE	n.d.	n.d.	n.d.	0	2	n/a	n/a
DK	1,015	936	352	2	3	35	38
EE	232	237	0	0	0	Not relevant	Not relevant
EL	3,183	382	1,869	6	6	59	No reliable data available
ES	4,516	4,516	2,710	1	4	60	60%
FI	900	69	300	2	4	33	No reliable data available
FR	18,491	15,597	600	1	7	3	4
HR	1,860	1,910	1,353	4	4	73	71
HU	3,315	3,050	3,267	1	1	99	Around 100
IE	1,400	1,400	550	3	3	39	n/a
IT	18,437	18,720	20,738	2	3	Around 100	Around 100
LT	n.d.	n.d.	n.d.	0	1	n/a	n/a
LU	100	100	65	2	2	65	n/a
LV	1,058	1,058	198	1	1	19	19
NL	n.d.	n.d.	n.d.	0	2	n/a	n/a
PL	30,000	19,497	11,230	3	3	37	58
PT	726	726	40	1	5	6	6
RO	n.d.	n.d.	n.d.	0	2	n/a	n/a
SE	306	306	349	3	4	n.d.	Around 100
SI	113	139	80	1	1	71	58
SK	2,083	2,093	1,525	1	1	73	73
EU27	96,861	75,769	50,387	41	70	52	66

Notes: n/a, not applicable; n.d., no data available. Cyprus and Malta were not included, as they do not have a fixed gas distribution network.

Sources: Network of Eurofound Correspondents and Eurostat, EU-LFS

2.2. Trade union involvement in collective bargaining or social dialogue

In the previous section, the sector-relatedness and membership strength of trade unions have been considered, while in this section their involvement in collective bargaining and policymaking is analysed in Table 9. This presents information on whether trade unions are involved in multi- or single-employer collective bargaining (single-employer bargaining covers only the workforce in the signatory employer, whereas multi-employer bargaining generally covers all members of the employer organisations that are party to an agreement), and the percentage and number of workers covered by such agreements. It should be noted that this table is based on estimates that have either been provided by members of the Network of Eurofound Correspondents or been inferred from general information about the level of collective bargaining coverage (particularly where such coverage is near universal) and systems for the extension of collective agreements.

The only country without trade union representation is Estonia. In all the other countries, collective bargaining takes place at sectoral and/or enterprise level. In 13 countries (Bulgaria, Croatia, Czechia, Greece, Hungary, Ireland, Latvia, Lithuania, Luxembourg, Poland, Portugal, Romania, Slovakia) only single-employer bargaining exists. These form the majority of the 25 countries where collective bargaining takes place. The importance of single-employer bargaining comes not only from the prevalence of decentralised bargaining in the national industrial systems, as in Ireland and some central and eastern European countries, but also from the presence of large, sometimes publicly owned, enterprises. Indeed, the average collective bargaining coverage in countries with single-employer bargaining is as high as 73%. In some of these countries it is 80% or more: Czechia (80%), Hungary (100%), Lithuania (80%), Luxembourg (95%), Latvia (90%), Poland (90%), Romania (90%) and Slovakia (97%). Such coverage rates place the gas sector well above the national coverage rates. In the 11 countries that have multi-employer bargaining, the average coverage rate is 93%.

Table 9: Collective bargaining involvement and consultation over sector-related policies of the gas sector trade unions

Country	SRCB (%)	MECB (national level)	Organisation	EU affiliation	MECB (trade union level)	SECB	Consultation
AT	100	Yes	GPA-djp	IndustriAll Europe, (EPSU) ⁵	Yes	No	Ad hoc
			PRO-GE	IndustriAll Europe	Yes	No	Regular
			yunion	EPSU	Yes	No	Regular
BE	100	Yes	ACV-CSC BIE	IndustriAll Europe	Yes	Yes	Regular
			ACLVB-CGSLB	IndustriAll Europe	Yes	Yes	Regular
			ACV-CSC CNE	IndustriAll Europe, EPSU	Yes	Yes	Regular
			Gazelco	EPSU	Yes	Yes	Regular
BG	60	No	НФТ “Химия и индустрия”	IndustriAll Europe	No	Yes	Ad hoc

⁵ GPA-djp is also affiliated to EPSU, however, according to the information provided by GPA-djp, not for its members in the gas sector.

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Country	SRCB (%)	MECB (national level)	Organisation	EU affiliation	MECB (trade union level)	SECB	Consultation
			ΗΦΧ ΚΤ Подкрепа	IndustriAll Europe, EPSU	No	Yes	Ad hoc
CZ	80	No	OS UNIOS	EPSU	No	Yes	No
			SOSE	EPSU	No	Yes	No
DE	83	Yes	IGBCE	IndustriAll Europe	Yes	Yes	Ad hoc
			ver.di	EPSU	Yes	Yes	Ad hoc
DK	85	Yes	Metal	IndustriAll Europe	Yes	No	Regular
			3F	IndustriAll Europe, (EPSU) ⁶	Yes	No	Ad hoc
			IDA	IndustriAll Europe	No	No	Ad hoc
EE	0	No	No trade unions				
EL	50	No	ΠΟΕ (ΠΟΕ)	IndustriAll Europe	No	No	Ad hoc
			ΣΕΔΕΣΦΑ (Sedesfa)	All are affiliated to the Panhellenic Energy Federation ΠΟΕ (ΠΟΕ), and as such indirectly affiliated to industrialAllEurope	No	Yes	Ad hoc
			EDA Attikis		No	Yes	Ad hoc
			EDA Thessalonikis Thessalias		No	Yes	Ad hoc
			ΣΕΔΕΠΑ (Sedepa)		No	Yes	No
			Zenith		No	Yes	Ad hoc
ES	95	Yes	UGT-FICA	IndustriAll Europe, EPSU	Yes	Yes	Ad hoc
			CCOO Industria	IndustriAll Europe	Yes	Yes	Ad hoc
			FI-USO	IndustriAll Europe	Yes	Yes	Ad hoc
			ELA	IndustriAll Europe, EPSU	No	Yes	No
FI	95	Yes	JHL	EPSU	Yes	No	Ad hoc
			TEK	IndustriAll Europe	Yes	No	Regular
			Pro	IndustriAll Europe	Yes	n.d.	n.d.
			YTN	n.d.	Yes	n.d.	n.d.
FR	100	Yes	CFE-CGC Energies	IndustriAll Europe, EPSU	Yes	Yes	Ad hoc
			CFTC-CMTE	IndustriAll Europe	No	Yes	No
			FCE-CFDT	IndustriAll Europe	Yes	Yes	Ad hoc
			FNEM-FO	IndustriAll Europe, EPSU	Yes	Yes	Ad hoc
			FNME-CGT	IndustriAll Europe, EPSU	Yes	Yes	Ad hoc
			UNSA Energie	None	No	Yes	No
			SUD Energies	None	No	Yes	No
HR	40	No	EKN	IndustriAll Europe	Yes	Yes	No
			SING	IndustriAll Europe	No	Yes	Regular
			SSKH	EPSU	No	Yes	Regular

⁶ 3F is also affiliated to EPSU, however, according to the information provided by 3F, not for its members in the gas sector.

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Country	SRCB (%)	MECB (national level)	Organisation	EU affiliation	MECB (trade union level)	SECB	Consultation
			SDPPTH	None	No	Yes	No
HU	100	No	VDSZ	IndustriAll Europe	No	Yes	No
IE	50	Yes	SIPTU	IndustriAll Europe, EPSU	No	Yes	Rare
			Connect	IndustriAll Europe	No	Yes	Rare
			Unite	IndustriAll Europe, EPSU	No	Yes	Rare
IT	100	Yes	Filctem-Cgil	IndustriAll Europe, EPSU	Yes	Yes	Ad hoc
			Femca-Cisl	IndustriAll Europe, EPSU	Yes	Yes	Ad hoc
			Uiltec-Uil	IndustriAll Europe	Yes	Yes	Ad hoc
LT	80	No	LPPSF	IndustriAll Europe, EPSU	No	Yes	Ad hoc
LU	90	No	OGB-L	IndustriAll Europe, EPSU	No	Yes	No
		No	LCGB	IndustriAll Europe	No	Yes	No
LV	90	No	LAKRS	None	No	Yes	Regular
NL	90	Yes	FNV Publiek Belang	IndustriAll Europe, EPSU	Yes	Yes	Ad hoc
			CNV	None	Yes	Yes	Ad hoc
PL	90	No	SPCh NSZZ Solidarność	IndustriAll Europe	No	Yes	Regular
			OZZGNG	None	No	Yes	Regular
			PPZ Kadra	IndustriAll Europe	No	Yes	Regular
PT	43	No	Fiequimetal	IndustriAll Europe	No	Yes	n.d.
			Sindel	EPSU, (IndustriAll Europe) ⁷	No	Yes	No
			Fetese	None	No	Yes	n.d.
			Sinergia	None	No	Yes	No
			ASOSI	None	No	Yes	n.d.
RO	90	No	FS Gaz	IndustriAll Europe, EPSU	No	Yes	Regular
			UFS Atlas	IndustriAll Europe	No	Yes	Regular
SE	90	Yes	Sveriges Ingenjörer	IndustriAll Europe	Yes	No	n.d.
			Unionen	IndustriAll Europe	Yes	No	No
			Seko	EPSU	Yes	No	Ad hoc
			Ledarna	None	Yes	No	No
SI	90	Yes	SDE	EPSU	Yes	No	Regular
SK	97	No	POZ	EPSU	No	Yes	No

Note: MECB, multi-employer collective bargaining; SECB, single-employer collective bargaining; SRCB, sector-related collective bargaining, covering both MECB and SECB; n.d., no data available.

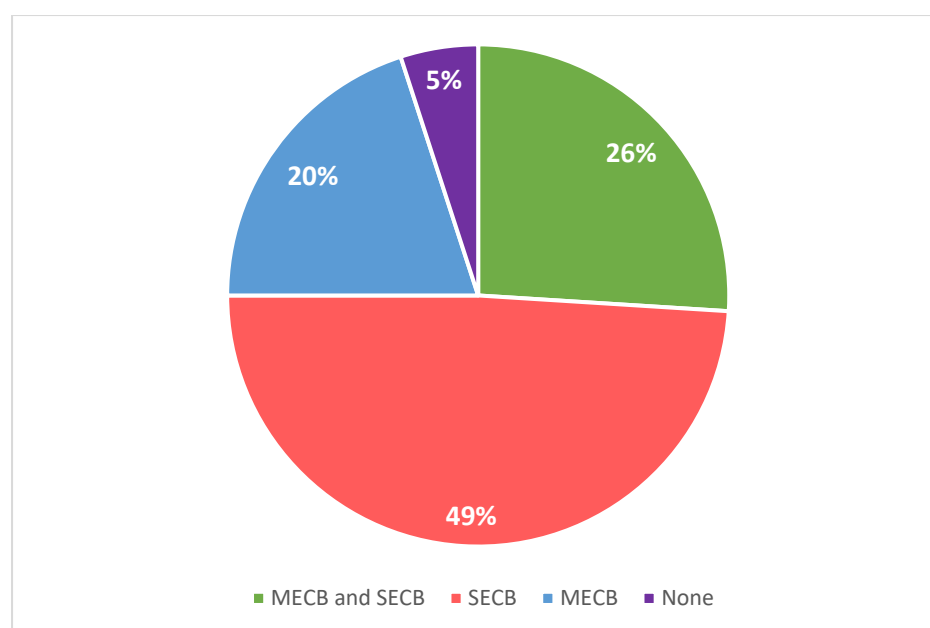
⁷ Sindel is affiliated to IndustriAll Europe, however, according to the information provided by Sindel, not for its members in the gas sector.

Source: Network of Eurofound Correspondents

Figure 6 shows that almost all sector-related trade unions are involved in some form of collective bargaining. Only two trade unions do not take part in any form of collective bargaining, namely the Danish IDA and the Greek ΠΟΕ (POE). They both have members in the sector, but they are not signatories of the sector-related collective agreements. POE is a federation of unions, but it does not sign the agreements directly, because its affiliates are the bargaining parties.

Almost half of all sector-related unions (34, or 49%) are involved in single-employer collective bargaining only. This is linked to the abovementioned prevalence of decentralised collective bargaining systems. Fourteen unions (20%) engage in multi-employer bargaining only, while 18 unions (26%) participate in both multi-employer and single-employer collective bargaining.

Figure 6: Involvement of trade unions in different forms of collective bargaining in the gas sector, 2020 (%)

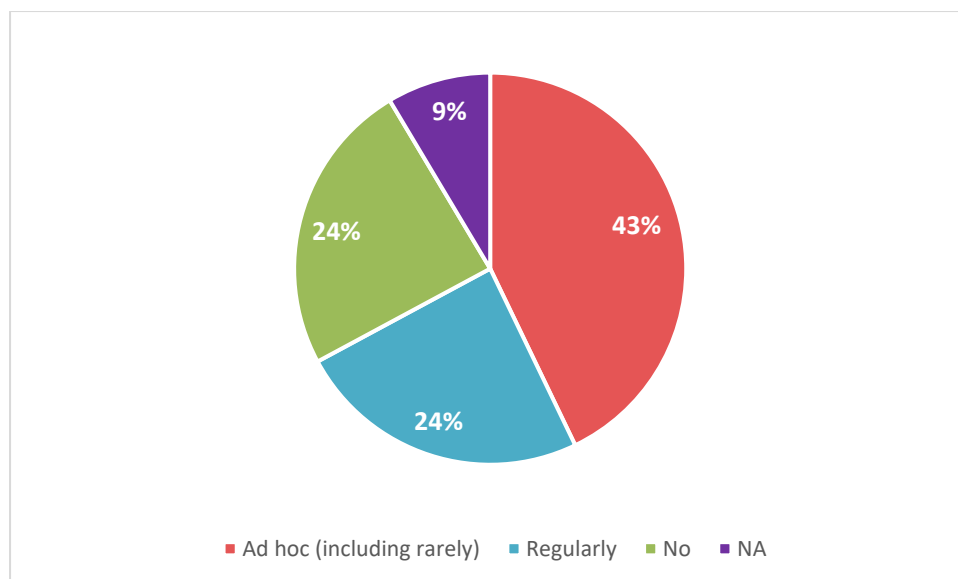


Note: N = 70. MECEB, multi-employer collective bargaining; SECB, single-employer collective bargaining.

Source: Network of Eurofound Correspondents

Consultation between government and trade unions about sector-related issues involves 67% of the trade union organisations covered by this study (Figure 7). Consultation takes place regularly with 24% of the unions and on an ad hoc basis with 43% of them. For six organisations, the information is not available.

Figure 7: Involvement of trade unions in different forms of policy consultations in the gas sector, 2020 (%)



Note: $N = 70$.

Source: Network of Eurofound Correspondents

2.3. Sector-relatedness and membership strength of employer organisations

Twenty-eight employer and business associations exist in two-thirds of the countries covered by this study (16 out of 25 countries, as Cyprus and Malta are not included). They tend to represent enterprises in different segments of the energy sector, such as electricity and heating, but sometimes they also cover the oil sector or other public utilities (such as water and waste). The only case of general representation is the Confederation of Danish Industry (DI), which represents the whole manufacturing, transport and construction sectors in Denmark.

All employer and business associations cover the whole territory in 16 countries where they operate, and almost all (except one) cover all types of companies working in the sector. Like the trade unions, they cover public and private sector companies to varying extents. The coverage of public sector companies is smaller than of the private sector. Fifteen employer organisations in 10 countries cover private gas companies. In contrast, six employer organisations in five countries cover public gas companies. At the same time, due to concerns over the reliability and comparability of the data, information regarding the presence of social partner organisations in the public and private sectors and the ranking of organisations needs to be treated with caution.

There is also significant multisectoralism on the employers' side, with organisations organising both the gas and electricity sector employers. The majority – 22 out of 28 employer organisations, in 14 countries – are reported to have overlap in their membership, covering companies outside the gas sector. Most frequently, they cover the electricity, energy production, heating and oil production sectors. Table 10 summarises the overlap with the electricity sector.

Table 10: Countries where gas sector employer organisations also organise electricity sector employers

Multisectoralism	Number of countries	Countries in this situation
All the gas sector employer organisations also organise electricity sector employers	6	BE, DK, FI, LT, NL, SI
Some, but not all, of the gas sector employer organisations also organise electricity sector employers	5	DE, FR, IT, RO, SE
Gas sector employer organisations do not organise electricity sector employers	5	AT, CZ, EE, ES, SK

Note: The countries marked in blue shading refer to the countries where gas sector employer organisations also organise employers in the electricity sector.

Source: Network of Eurofound Correspondents

Of the 28 gas sector employer organisations, 13 (50%) in 11 countries also organise employers in the electricity sector. The organisations are listed in Table 11. In six countries, all the gas sector employer organisations also organise electricity sector employers. This is the case in Belgium, Denmark, Finland, Lithuania, the Netherlands and Slovenia. In five other countries, some but not all of the gas sector employer organisations also organise electricity sector employers. This is the case in Germany, France, Italy, Romania and Sweden. In the remaining five Member States, none of the gas sector employer organisations has any involvement in organising the employers in the electricity sector. This is the case in Austria, Czechia, Estonia, Slovakia and Spain.

The overlap among the gas sector trade unions that also organise electricity sector employees (76% in 19 countries) is stronger than the overlap on the employers' side, although, with 46% of the sectoral employer organisations in 10 of the 16 countries with sectoral employer organisations, the multisectoralism between gas and electricity on the employers' side also remains significant.

Representativeness of the European social partner organisations: Gas sector

Table 11: Sector-relatedness of national employer organisations in the gas sector, 2020

Country	Organisation	Type	35.1	35.2	35.3	Territorial coverage	Types of businesses	Public	Private	Overlap	Overlap description	Domain
AT	FGW	EO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Heating	O
BE	FEPEG	EO	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Electricity	SO
	Synergrid	EO	No	Yes	No	Yes	Yes	No	Yes	Yes	Electricity	SO
CZ	ČPS	BA	No	Yes	Yes	Yes	Yes	n.d.	n.d.	Yes	Heating	SO
DE	VAEU	EO	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Electricity and other public utilities	O
	BDEW	BA	Yes	Yes	Yes	Yes	Yes	n.d.	n.d.	Yes	Electricity, drinking water supply, sewage water	O
	BVEG	EO	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Geo-energy and crude oil production	O
	Zukunft Erdgas	Other	Yes	Yes	Yes	Yes	Yes	n.d.	n.d.	No		C
DK	DI	Both	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Manufacturing industry, transport, service, construction, electricity	O
EE	Eesti Gaasiliit	BA	No	Yes	Yes	Yes	Yes	n.d.	n.d.	Yes	Sale of fuels, ores, metals and industrial chemicals; repair and maintenance of gas equipment; construction of water, sanitation and gas pipe networks; heating and ventilation; industrial gases	SO
ES	Sedigas	BA	No	Yes	Yes	Yes	Yes	n.d.	n.d.	No		S
FI	Energiateollisuus	EO	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Energy, electricity	SO
FR	UNEmIG	EO	Yes	Yes	Yes	Yes	Yes	No	Yes	No		C
	AFG	BA	Yes	Yes	Yes	Yes	Yes	n.d.	n.d.	No		C

Representativeness of the European social partner organisations: Gas sector

Country	Organisation	Type	35.1	35.2	35.3	Territorial coverage	Types of businesses	Public	Private	Overlap	Overlap description	Domain
IT	Energia Libera	EO	No	No	Yes	Yes	Yes	n.d.	n.d.	Yes	Electricity, energy efficiency, electric mobility	SO
	Anigas	EO	No	Yes	Yes	Yes	Yes	No	Yes	No		S
	IGAS	EO	Yes	Yes	Yes	Yes	No	No	Yes	No		S
	Utilitalia	EO	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Environmental and water	SO
	Assogas	EO	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Environment	SO
LT	NLEA	BA	No	Yes	Yes	Yes	Yes	n.d.	n.d.	Yes	Electricity, education	SO
NL	EN	BA	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Electricity	SO
	WENB	EO	No	Yes	Yes	Yes	Yes	No	Yes	Yes	Electricity, waste management	SO
RO	FPGC	EO	Yes	Yes	No	Yes	Yes	n.d.	n.d.	Yes	Oil, extractive industry	SO
	ACUE	EO	No	Yes	Yes	Yes	Yes	n.d.	n.d.	Yes	Electricity	SO
SE	EFA	EO	n.d.	n.d.	n.d.	Yes	Yes	n.d.	Yes	Yes	Energy, electricity	SO
	Sobona	EO	n.d.	n.d.	n.d.	Yes	No	Yes	No	Yes	Municipal companies	SO
SI	EZS	EO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Energy, electricity	O
SK	SPNZ	EO	Yes	Yes	Yes	Yes	Yes	n.d.	n.d.	Yes	Oil	O
EU27	28 EOs and BAs		14	23	22	29	28	6	15	22		
	In 16 countries		In 10 countries	In 15 countries	In 15 countries	In 16 countries	In 16 countries	In 5 countries	In 10 countries	In 14 countries		

Note: BA, business association; C, congruence; EO, employer organisation; n.d., no data available; O, overlap; S, sectionalism; SO, sectional overlap. Members of Eurogas are in bold. Due to concerns over the reliability and comparability of the data, information regarding the presence of social partner organisations in the public and private sectors and the ranking of organisations needs to be treated with caution. Colour coding: green shaded cells indicate positive answers; organisations shaded in blue also organise companies in the electricity sector.

Source: Network of Eurofound Correspondents

Data on membership are difficult to obtain, especially because of the prevalence of overlapping representation. However, the density in the gas sector appears to be particularly high, especially in terms of employees covered, because of the concentration of employment in a small number of large enterprises. This is supported by the sometimes big difference between the density rates in terms of enterprises and of employees. The (unweighted) average associational density in the countries for which we could collect data (13 out of 17) is 84%.

Table 12: Employer and business associations' organisational density in the gas sector, 2020

Country	Member enterprises	Number of organisations that have provided membership data on companies	Density (enterprises) (%)	Number of organisations that have provided data on workforce employed in member companies	Density (employees) (%)
AT	n.d.	1 out of 1	100	1 out of 1	100
BE	25	2 out of 2	75	1 out of 2	50
CZ	67	1 out of 1	100	1 out of 1	100
DE	80	1 out of 3	2	0 out of 3	n.d.
DK	11	1 out of 1	8.5	0 out of 1	0
EE	8	1 out of 1	28	1 out of 1	80
ES	170	1 out of 1	(Reported over 100)	1 out of 1	90
FI	70	1 out of 1	80	1 out of 1	95
FR	37	2 out of 2	100	2 out of 2	100
IT	223	5 out of 5	36	5 out of 5	90–100
LT	3	1 out of 1	25	1 out of 1	80
NL	10	1 out of 2	2	1 out of 2	80
RO	2	2 out of 2	38	2 out of 2	39
SE	n.d.	0 out of 2	0	0 out of 2	n.d.
SI	n.d.	1 out of 1	90	1 out of 1	90
SK	53	1 out of 1	(Reported over 100)	1 out of 1	95

Note: n.d., no data available.

Source: Network of Eurofound Correspondents

2.4. Gas employer organisations' involvement in collective bargaining

Table 13 shows that slightly more than half of the employer associations in the gas industry are involved in collective bargaining (57%). On the other hand, practically all organisations are involved in consultations over sector-related policies, mostly regularly (55%) or ad hoc (36%). Only one employer association does not seem to be involved in consultations, the German VAEU, while for two other German associations relevant information could not be collected (BDEW and Zukunft Erdgas).

Table 13: Collective bargaining and social dialogue involvement of the gas sector employer and business associations

Country	Organisation	Collective bargaining	Consultation	EU affiliation
AT	FGW	Yes	Regular	Eurogas
BE	FEBEG	Yes	Regular	None
	Synergrid	Yes	Regular	None
CZ	ČPS	No	Ad hoc	Eurogas
DE	VAEU	Yes	No	None
	BDEW	No	No data	Eurogas
	BVEG	Yes	Regular	None
	Zukunft Erdgas	No	No data	Eurogas
DK	DI	Yes	Regular	BusinessEurope
EE	Eesti Gaasiliit	No	Ad hoc	None
ES	Sedigas	No	Regular	Eurogas
FI	Energiategollisuus	Yes	Ad hoc	None
FR	UNEmIG	Yes	Ad hoc	None
	AFG	No	Ad hoc	Eurogas
IT	Energia Libera	No	Regular	None
	Anigas	Yes	Regular	Eurogas
	IGAS	Yes	Regular	None
	Utilitalia	Yes	Regular	None
	Assogas	Yes	Ad hoc	None
LT	NLEA	No	Ad hoc	IGU
NL	EN	No	Ad hoc	None
	WENB	Yes	Regular	None
RO	FPGC	No	Ad hoc	None
	ACUE	No	Regular	Eurogas
SE	EFA	Yes	Regular	None
	Sobona	Yes	Ad hoc	None
SI	EZS	Yes	Regular	None
SK	SPNZ	No	Regular	None

Representativeness of the European social partner organisations: Gas sector

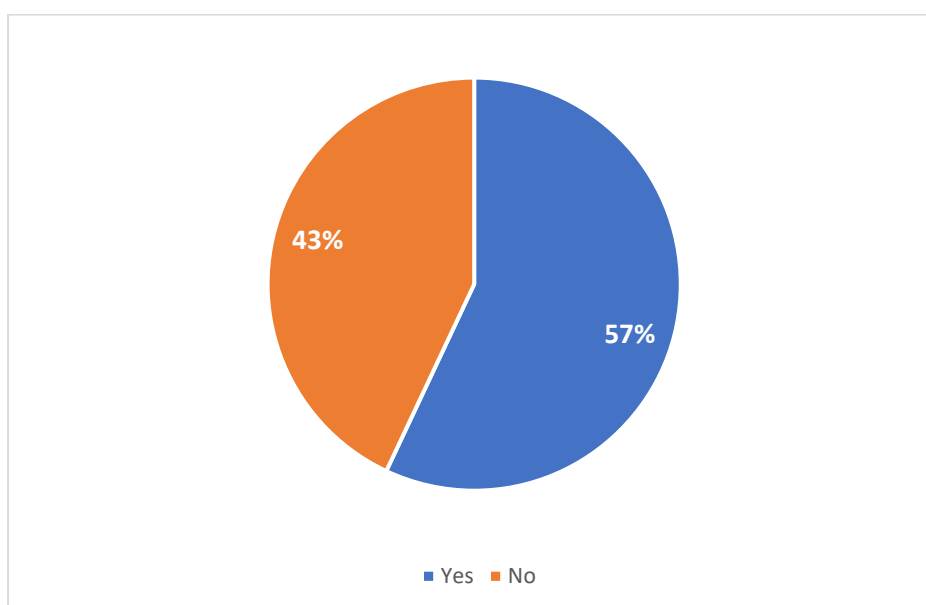
Country	Organisation	Collective bargaining	Consultation	EU affiliation
EU27	23 employer organisations and 5 business associations (shaded in red), in 16 countries	16 organisations in 10 countries	Regular: 15 organisations in 11 countries Ad hoc: 10 organisations in 9 countries None: 1 organisation in 1 country (DE)	Eurogas: 8 organisations in 7 countries BusinessEurope: 1 organisation in 1 country (DK) IGU: 1 organisation in 1 country (LT) None: 18 organisations in 11 countries

Note: Colour coding: the organisations shaded in red are not involved in collective bargaining and are not affiliated to an EU employer organisation, and as a consequence are considered business associations.

Source: Network of Eurofound Correspondents

If we consider only involvement in collective bargaining, and exclude policy consultation in our bottom-up approach (see section 0.4 above), 16 employer organisations will be considered (Figure 8), while the top-down approach identifies 12 sector-related national organisations, since they are affiliated to Eurogas. Of the latter, four are also involved in sector-related bargaining. Therefore, the two criteria make it possible to identify 24 national employer organisations participating in sector-related collective bargaining and/or members of the EU-level sectoral organisations. The remaining six national organisations appear to operate essentially as business associations. In terms of consultation by the government on sector-related aspects and working conditions, 15 organisations from 11 countries are consulted on a regular basis and 10 on an ad hoc basis (Figure 9). Out of the 23 organisations identified, only one, from Germany, is not consulted (VAEU) and no data were available for another two from the same country: BDEW and Zukunft Erdgas.

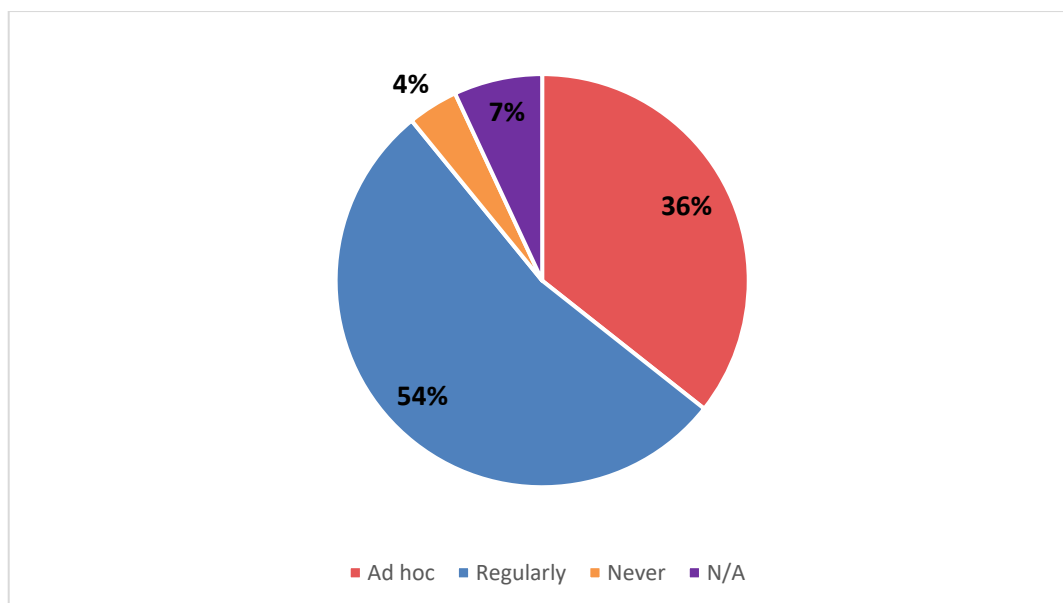
Figure 8: Involvement of employer organisations and business associations in collective bargaining in the gas sector, 2020 (%)



Note: N = 28.

Source: Network of Eurofound Correspondents

Figure 9: Involvement of employer organisations and business associations in different forms of policy consultations in the gas sector, 2020 (%)



Note: The percentages do not add up to 100% due to rounding. *N* = 28.

Source: Network of Eurofound Correspondents

2.5. Bipartite and tripartite social dialogue bodies in the gas sector

There are 20 sector-specific bipartite and tripartite bodies for the gas sector in nine Member States (Table 14). Twelve are bipartite and eight are genuinely tripartite. They are equally divided between statutory and collectively agreed bodies and cover a wide array of topics. Health and safety and training are among the most common responsibilities of such bodies (Denmark, Finland, France, Romania). Other bodies cover general sectoral issues (France, Hungary, Slovenia), including pensions and social security (France and Italy).

Representativeness of the European social partner organisations: Gas sector

Table 14: Bipartite and tripartite bodies with relevance for the gas sector, 2020

Country	Body	Type	Responsibilities	Statutory	Trade unions	Employer organisations
BE	Fonds voor Bestaanszekerheid van het Gas-en Elektriciteitsbedrijf/Assurance Fund for the Gas and Electricity Company	Bipartite	Social fund	Statutory	ACV-BIE, CNE, Gazelco, ACLVB-CGSLB	FEPEG, Synergrid
	Fonds voor Aanvullende Vergoedingen/Supplementary Payments	Bipartite	Financing additional payments that are available for employees within Joint Committee	Statutory	ACV-BIE, CNE, Gazelco, ACLVB-CGSLB	FEPEG, Synergrid
	Syndicaal vormingsfonds/Trade Union Training Fund	Bipartite	Financing of training for trade union activists	Statutory	ACV-BIE, CNE, Gazelco, ACLVB-CGSLB	FEPEG, Synergrid
DK	Branchefælles-skab for Arbejdsmiljø – Industri (Trade Association for Working Environment – Industry)	Tripartite	Working environment	Statutory	Dansk Metal, 3F, HK Privat, Dansk El-Forbund (DEF), CO-industri, Fødevareforbundet NNF, Teknisk Landsforbund	Grakom, Medie-arbejdsgiverne, Dansk Mode og Textil, Lederne
	Fagligt Udvalg for VVS-energiuddannelsen (Vocational Committee for Education in Gas, Heating, Water, Sanitation, Ventilation and Air Conditioning)	Tripartite	Vocational training/education	Statutory	Blik og Rør	Tekniq
	Industriens Uddannelser (Vocational Committee for Industrial Education)	Tripartite	Vocational training/education	Statutory	Dansk Metal, 3F (Secretariat with DI). Many more unions and employer organisations are involved in ‘industrial education’ (for example, Blik og Rør and Tekniq)	DI
FI	National Forum for Skills Anticipation	Tripartite	Education	Agreement	Finnish Electrical Workers Union is an alternate member	Finnish Energy
	Branch-specific committee of the Centre for Occupational Safety (part of the Industrial Group)	Tripartite	Safety	Not available	Trade Union Pro, Finnish Electrical Workers Union, Union of Professional Engineers in Finland	Palta
FR	Commission paritaire de branche	Bipartite	Collective bargaining	Agreement (2013)	CFE-CGC Energies, FCE-CFDT, FNEM-FO and FNME-CGT	UFE, UNEmiG
	Réunion de concertation et de coordination	Bipartite	Social dialogue	Agreement (2013)	CFE-CGC Energies, FCE-CFDT, FNEM-FO and FNME-CGT	UFE, UNEmiG

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Country	Body	Type	Responsibilities	Statutory	Trade unions	Employer organisations
	Observatoire de la négociation collective	Bipartite	Annual assessment of collective bargaining	Agreement (2013)	CFE-CGC Energies, FCE-CFDT, FNEM-FO and FNME-CGT	UFE, UNEmIG
	Commission Paritaire Nationale pour l'Emploi et la Formation Professionnelle	Bipartite	Vocational training	Agreement	CFE-CGC Energies, FCE-CFDT, FNEM-FO and FNME-CGT	UFE, UNEmIG
	Commission Supérieure Nationale du Personnel	Bipartite	Application of the IEG status	Statutory	CFE-CGC Energies, FCE-CFDT, FNEM-FO and FNME-CGT	UFE, UNEmIG
	Commissions Secondaires du Personnel	Bipartite	Status. Consulted prior to decisions affecting statutory employees (recruitment, promotion, discipline, mobility, etc.)	Statutory	CFE-CGC Energies, FCE-CFDT, FNEM-FO and FNME-CGT	UFE, UNEmIG
	Caisse d'Assurance Maladie des IEG	Tripartite	Compulsory social security scheme	Statutory	CFE-CGC Energies, FCE-CFDT, FNEM-FO and FNME-CGT	UFE, UNEmIG
	Conseil Supérieur de l'Energie	Tripartite	Renewable energy	Statutory	CFE-CGC Energies, FCE-CFDT, FNEM-FO and FNME-CGT	UFE, AFG
HU	Gázipari Egyeztető Fórum (Interest Reconciliation Forum for the Gas industry)	Bipartite	Gas sector	Agreement/informal	GSZSZ trade union confederation (members are members of VDSZ)	Individual employers: TIGÁZ, NKM
IT	Fondo di Previdenza Complementare Pegaso	Bipartite	Integrative pension fund	Agreement	Filctem-Cgil, Femca-Cisl, Uiltec-Uil	Utilitalia and Anfida
RO	Sectoral Committee for Energy	Bipartite	Education and professional qualifications	Agreement	Federația Națională a Sindicatelor din Electricitate Univers, Federația Sindicatelor Libere Independente "Energetica", Federația Sindicatelor Libere și Independente Petrol-Energie, FS Gaz	Federația Patronală Petrol și Gaze
SI	Economic and Social Committee for Energy	Tripartite	Legislation, sector's specifics, privatisation. All legislation changes must be consulted on and approved by social partners	Agreement	SDE	EZS
EU27	20 sector-related social dialogue bodies in 9 countries: 12 bipartite and 8 tripartite					

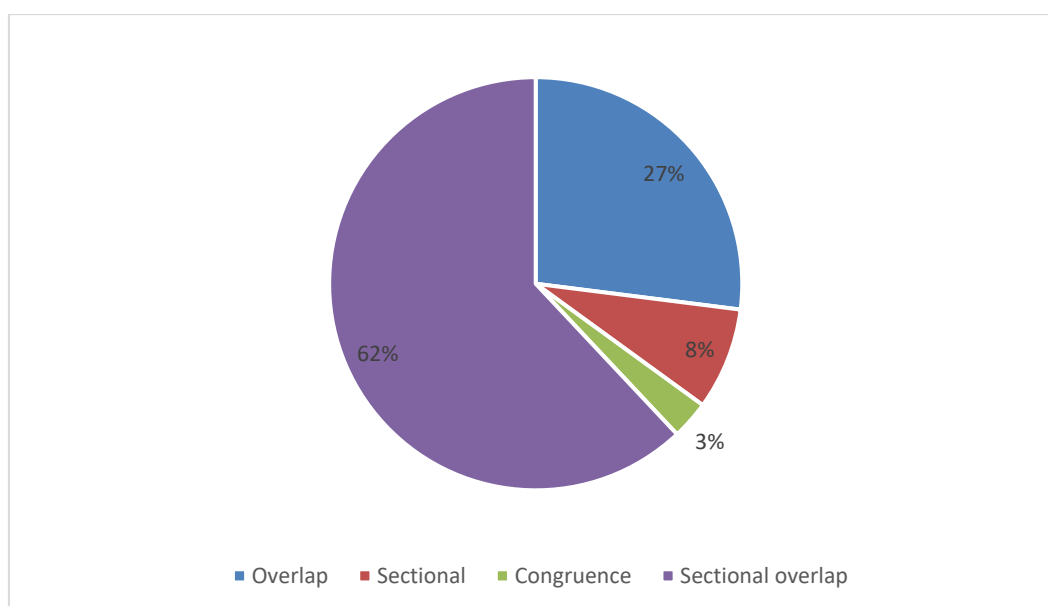
Source: Network of Eurofound Correspondents

2.6. Sector-relatedness and fragmentation of gas sector trade unions and employer organisations

Sector-relatedness and fragmentation of trade unions

To start with, trade unions are assessed on how they relate to the sector by classifying them according to the four patterns of sector-relatedness. Figure 10 shows that the most common representational domain is sectional overlap (62%), followed by overlap (27%), sectionalism (8%) and congruence (3%). The overwhelming majority of overlapping representational domains (sectional or not) follows from the significant presence of occupational and multisector unions, covering gas and several other industries. Moreover, sectoral unions tend to cover the whole energy sector and not only the gas industry.

Figure 10: Type of sector-relatedness of gas sector trade unions, 2020



Source: Network of Eurofound Correspondents

Table 15 indicates the representational pattern of the trade unions included in this study. Twenty trade unions have an overlapping representational domain, whereas 45 show a sectional overlap, that is, they cover part of gas plus other activities. In cases of overlap, the trade unions are active in the gas sector and represent all workers in the sector as well as employees in other sectors. Only a minority of trade unions do not extend representation beyond the gas sector. Two show a congruent domain, that is, they represent only workers in the whole gas sector, while six trade unions cover only some part of it. POZ, in Slovakia, and OZZGNG (the latter despite its name, the All-Poland Oil and Gas Mining Trade Union) were reported as the only organisations representing the whole gas sector alone. Sectional representation characterises all Greek gas trade unions, mostly because they are organised at company and territorial levels and also because they cover only distribution and trade. They are ΣΕΔΕΣΦΑ (Sedesfa), EDA Attikis, EDA Thessalonikis Thessalias, ΣΕΔΕΠΑ (Sedepa) and Zenith⁸. The only Greek trade union with a different representational domain is ΠΟΕ (POE), which covers other sectors besides gas. The other sectional trade union is SDPPTH, in Croatia. Trade unions with overlapping representation organise workers in the most diverse sectors. Sometimes trade union representation extends to the electricity or energy sector, but there are no clear

⁸ ΣΕΔΕΣΦΑ (Sedesfa), EDA Attikis, EDA Thessalonikis Thessalias, ΣΕΔΕΠΑ (Sedepa) and Zenith are all member organisations of the Panhellenic Energy Federation ΠΟΕ (POE).

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patterns. Other national sector-related trade unions represent workers in the chemicals industry, manufacturing industry, transport, mining or even most or all sectors. Indeed, among sector-related trade unions, we can also find general unions and confederations.

Table 15: Membership domains of gas sector trade unions

Country	Congruence	Sectionalism	Sectional overlap	Overlap
AT			GPA-djp, PRO-GE	younion
BE			ACV-CSC CNE	ACV-CSC BIE, ACLVB-CGSLB, Gazelco
BG				НФТ “Химия и индустрия”, НФХ КТ Подкрепа
CZ				<i>OS UNIOS, SOSE</i>
DE			<i>ver.di</i>	IGBCE
DK			Metal, 3F, IDA	
EL		ΣΕΔΕΣΦΑ (Sedesfa), EDA Attikis, EDA Thessalonikis Thessalias, ΣΕΔΕΠΑ (Sedepa), Zenith		ΠΟΕ (ΠΟΕ)
ES			ELA	UGT-FICA, CCOO Industria, FI-USO
FI			TEK, Pro, YTN	
FR			CFE-CGC Energies, CFTC-CMTE, FCE-CFDT, FNEM-FO, FNME-CGT, SUD Energies, UNSA Energie	
HR		SDPPTH	SING, SSKH, EKN	
HU			VDSZ	
IE			Connect, Unite	SIPTU
IT			Filctem-Cgil	Femca-Cisl, Uiltec-Uil
LT			LPPSF	
LU				LCGB, OGB-L
LV			LAKRS	
NL				FNV Publiek Belang, CNV
PL	OZZGNG		PPZ Kadra	SPCh NSZZ Solidarność
PT			Fiequimetal, Sindel, Fetese, Sinergia, ASOSI	
RO			FS Gaz, UFS Atlas	
SE			Sveriges Ingenjörer Unionen, Seko, Ledarna	
SI			SDE	
SK	POZ			

Note: Members of IndustriAll Europe are marked in bold, members of EPSU in italics and members of both IndustriAll Europe and EPSU in bold italics.

Source: Network of Eurofound Correspondents

Reasons for pluralism of gas sector trade unions

This section provides an overview of the reasons for organisational fragmentation and pluralism in the gas sector. Fragmentation occurs when different organisations cover different segments of a sector. This makes those organisations complementary, as their membership domains are not overlapping. Pluralism, on the other hand, is when organisations coexist in the same (or very similar) domain, representing the same types of employees.

In the gas sector, there is an average of three trade unions per country. The reasons for having more than one trade union per country (where this is the case) are outlined in Table 16. It shows that the most common reason is fragmentation. This includes having members in different parts of the sector or types of activities (e.g. electricity sector and energy sector), which is the case in seven countries, organising different categories of workers (e.g. blue-collar or white-collar workers), which is the case in eight countries, having members in different parts of the country, which occurs in seven countries, and having members in different types of companies (e.g. of different sizes), in three countries. Pluralism, that is, having similar membership domains but differing ideologies, is recorded in nine countries.

Table 16: Reasons for fragmentation and pluralism of trade unions in the gas sector, 2020

Country	They organise different categories of workers	They have members in different parts of the country	They have members in different types of companies in terms of size or ownership	They have members in different parts of the sector/types of activities	They have similar membership domains but differ in ideology	Other reasons
AT						
BE						
BG						
CZ						
DE						
DK						
EE	No trade unions					
EL						a
ES						
FI						
FR						
HR						b
HU	Only one sectoral trade union – no fragmentation					
IE						
IT						
LT	Only one sectoral trade union – no fragmentation					

Representativeness of the European social partner organisations: Gas sector

LU						
LV	Only one sectoral trade union – no fragmentation					
NL						
PL						
PT						
RO						^c
SE						
SI				Only one trade union		
SK	Only one sectoral trade union – no fragmentation					
EU27	8	4	2	12	8	2

Notes: Green shading indicates yes. ^a Reason for fragmentation in Greece is that there is a separation between the unions of permanent staff and those of subcontractors' workers. ^b Reason for fragmentation in Croatia is that there is almost no collaboration and cooperation between various trade unions in the sector. ^c Reason for fragmentation in Romania has to do with the history of the trade unions, competition among leaders, etc.

Source: Network of Eurofound Correspondents

Sector-relatedness of employer organisations in the gas sector

Table 17 confirms that employer associations tend to represent broader interests than the gas sector alone. The importance of the energy sector, and more broadly of public utilities, as a reference for sectoral employer associations makes overlapping representational domains particularly common (Table 11). Four-fifths of the 30 sector-related employer associations present sectional overlapping or overlapping representation (53% and 27% respectively). The remainder is equally divided between sectional and congruent representation, with 10% each (see Figure 11).

Table 17: Membership domain patterns of the sector-related employer and business associations in the gas sector, 2020

Country	Congruence	Sectionalism	Sectional overlap	Overlap
AT				FGW
BE			FEbEG, Synergrid	
CZ			ČPS	
DE	Zukunft Erdgas			BDEW, BVEG, VAEU
DK				DI
EE	Eesti Gaasiliit			
ES		Sedigas		
FI			Energiateollisuus	
FR	UNEmIG, AFG			
IT		Anigas, IGAS	Energia Libera, Utilitalia, Assogas	
LT			NLEA	
NL			EN, WENB	

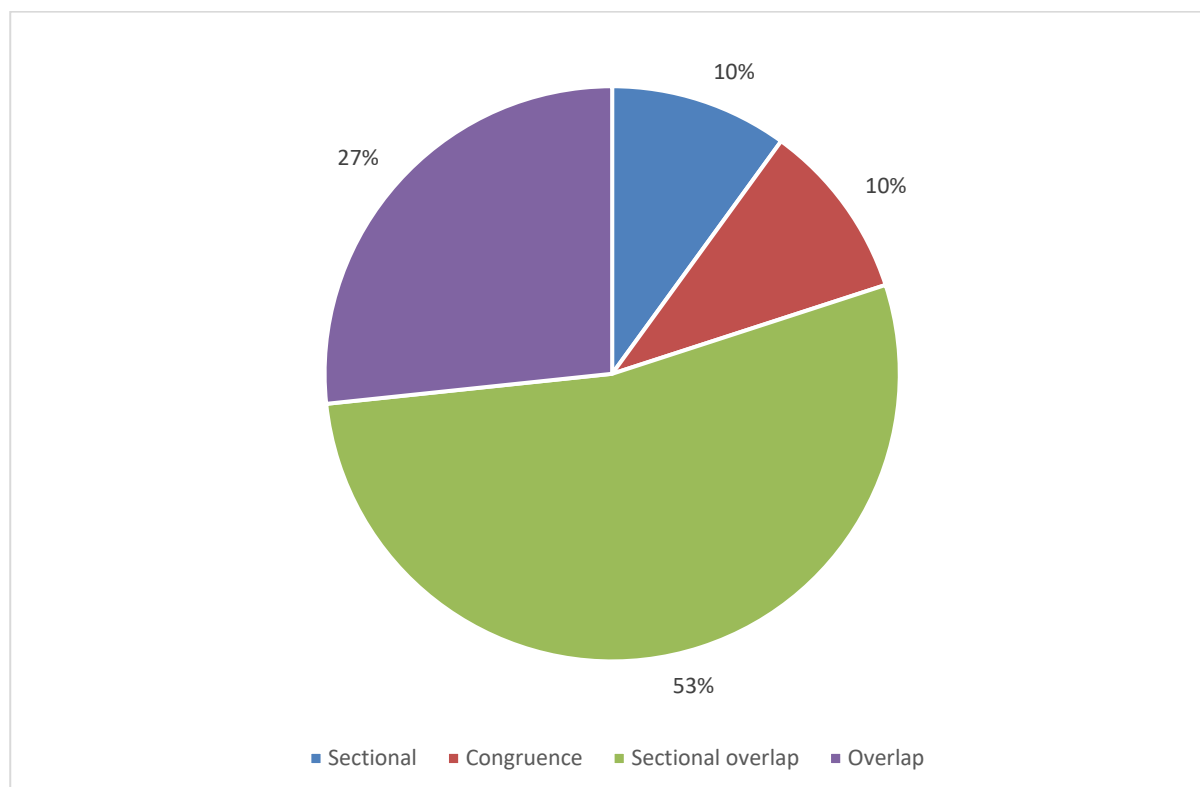
Representativeness of the European social partner organisations: Gas sector

Country	Congruence	Sectionalism	Sectional overlap	Overlap
RO			FPGC, ACUE	
SE			EFA, Sobona	
SI				EZS
SK				SPNZ

Note: Members of Eurogas are marked in bold.

Source: Network of Eurofound Correspondents

Figure 11: Domain coverage of the employer and business associations in the gas sector, 2020



Source: Network of Eurofound Correspondents

Reasons for pluralism in the gas sector employer organisations

Employer organisations average two per country. There is a higher level of variation in the number of employer organisations per country than of trade unions, as there are 14 countries where there is only one or no employer organisation, compared with 2 such countries for trade unions.

The most prominent reason for fragmentation among employer organisations is having members in different parts of the gas sector or carrying out different activities. This was also seen in section 2.3 looking at the breadth of the sectoral coverage; employer organisations mostly cover a narrow range of segments, while trade unions tend to cover a wider range. Still, there is one country where their members are different types of companies and two countries where other reasons apply. A detailed overview is shown in Table 18.

Table 18: Reasons for fragmentation and pluralism of employer organisations

Country	They have members in different parts of the country	They have members in different types of companies in terms of size or ownership	They have members in different parts of the sector/types of activities	They have similar membership domains but differ in ideology	Other reasons
AT	1 employer organisation in sector				
BE					
BG	No employer organisation in sector				
CZ	1 employer organisation in sector				
DE					^a
DK					
EE					
EL	No employer organisation in sector				
ES	1 employer organisation in sector				
FI	1 employer organisation in sector				
FR	No information provided				
HR	No employer organisation in sector				
HU	1 employer organisation in sector				
IE	No employer organisation in sector				
IT					
LT	1 employer organisation in sector				
LU	No employer organisation in sector				
LV	No employer organisation in sector				
NL	No information provided				
PL	1 employer organisation in sector				
PT	No employer organisation in sector				
RO					^b
SE					
SI					
SK	1 employer organisation in sector				

Notes: Blue shading indicates yes. ^a Reason for fragmentation in Germany is that they have similar membership domains, but different charters and tasks. ^b Reason for fragmentation in Romania has to do with competing agendas, interpersonal relations, etc.

Source: Network of Eurofound Correspondents

Overview of multisectoralism

As shown previously in sections 2.1 and 2.3, significant proportions of trade unions (79%) and of employer organisations (39%) have members from other sectors in addition to the gas sector. These are the organisations that have sectional overlapping or overlapping domains.

The sections above show the main sectors covered by organisations, indicating the number of organisations and the countries where the organisations' domains include additional sectors. One domain may include several other sectors at the same time. There are some similarities as well as differences between trade unions and employer organisations.

Trade unions tend to cover more other sectors in their domains than employer organisations, in terms of number of organisations and the number of countries. In fact, only Bulgaria, Greece, Latvia and Slovakia have trade unions that are not engaged in any other sectors besides the gas sector, while four countries have employer organisations that do not cover other sectors (France, Germany, Italy and Spain).

Among trade unions, the most common other sectors are energy and electricity (76% of trade unions), manufacturing, and state administration, education, health and/or research. Electricity is also at the top of the employer organisations' list, with 50% of the employer organisations representing companies in energy and electricity. There are also companies active in manufacturing, followed by agriculture, construction and services.

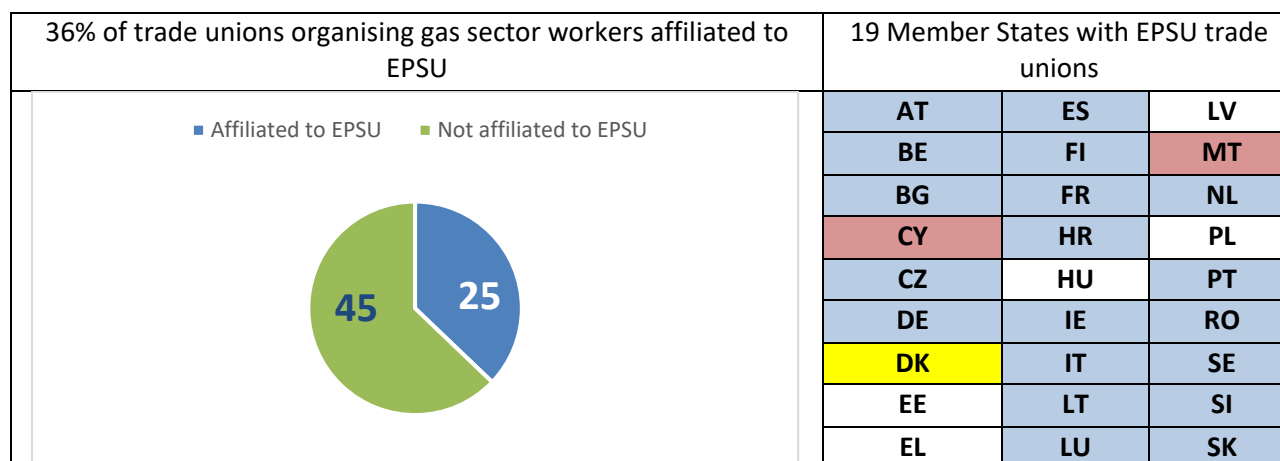
3. European level of interest representation

This chapter assesses the representativeness of the social partners at European level in the following ways. First, the membership strengths of EPSU, IndustriAll Europe and Eurogas are analysed, based on the presence of national affiliates in each of the countries covered by this study. Second, the capacity to negotiate on behalf of their national affiliates is checked, by looking at their statutes and existing arrangements with national affiliates. Third, the representativeness of the organisations currently involved in sectoral social dialogue is assessed against the representativeness of alternative EU-level organisations that operate in the gas sector, if any.

3.1. Membership domain of EPSU

EPSU is affiliated to the European Trade Union Confederation (ETUC) and represents workers in the gas sector as well as in public services across Europe. As a multi-industry federation, the representational domain of EPSU also covers the gas sector under review here.

Figure 12: Number of trade unions in gas sector affiliated to EPSU, 2019–2020



Note: Colour coding: in the countries shaded in red, there are no gas sector activities; In the countries shaded in blue, there is at least one gas sector trade union affiliated to EPSU for its gas sector members; the country shaded in yellow, Denmark, has a gas sector trade union affiliated to EPSU for its members in other sectors, not for its gas sector members.

Source: Network of Eurofound Correspondents

Of the 70 national trade unions active in the gas sector, 28 in 20 countries are members of EPSU (40%). Of these 28 member organisations, there are three that are affiliated to EPSU but not for their members in the gas sector. These are GPA in Austria, 3F in Denmark and CNV in the Netherlands. There are thus 25 trade unions (36% out of 70) that are affiliated to EPSU for their members in the gas sector, from 19 of the 24 countries where there are gas sector trade unions (Figure 12). In Malta and Cyprus there are no gas sector activities and in Estonia there are no gas sector trade unions. In Greece, Hungary, Latvia and Poland there are gas sector trade unions but none of them is affiliated to EPSU. In Denmark, 3F is affiliated to EPSU, but not for its members in the gas sector.

If we consider membership data, as far as it is available, EPSU's affiliates represent some 43,000 workers out of almost around 66,000 unionised workers in the gas industry (see section 2.1), or 65% of all sectoral union members. EPSU has members in 20 Member States.

Representativeness of the European social partner organisations: Gas sector

In 12 of the 24 Member States with sector-related trade unions, the trade union with most members in the gas industry is affiliated to EPSU (Table 19). All the members of EPSU engage in collective bargaining, and 20 take part in some sort of social consultation, mostly on an ad hoc basis (see section 2.2).

Table 19: Sector-related trade unions affiliated to EPSU

Country	Trade unions affiliated to EPSU for their members in the gas sector	Trade unions affiliated to EPSU, but not for their members in the gas sector	Trade unions not affiliated to EPSU	Is the trade union with most members in the sector affiliated to EPSU?
AT	younion	(GPA-djp) ⁹	PRO-GE	Yes
BE	Gazelco, ACV-CSC CNE		ACLVB-CGSLB, ACV-CSC BIE,	No
BG	НФХ КТ Подкрепа		НФТ “Химия и индустрия”	No
CZ	OS UNIOS, SOSE		None	Yes (OS UNIOS)
DE	ver.di		IGBCE	No
DK		(3F) ¹⁰	IDA, Metal	No
EE	No trade unions			
EL	None		EDA Attikis, EDA Thessalonikis Thessalias, Zenith, ΠΟΕ (POE), ΣΕΔΕΠΑ (Sedepa), ΣΕΔΕΣΦΑ (Sedesfa)	No
ES	ELA, UGT-FICA		CCOO Industria, FI-USO	Yes (UGT-FICA)
FI	JHL		Pro, TEK, YTN	No
FR	CFE-CGC Energies, FNEM-FO, FNME-CGT		CFTC-CMTE, FCE-CFDT, SUD Energies, UNSA Energie	Yes
HR	SSKH		SDPPTH, SING	No
IE	SIPTU, Unite		Connect	Yes
IT	Femca-Cisl, Filctem-Cgil		Uiltec-Uil	Yes
LT	LPPSF		None	Yes
LU	OGB-L		LCGB	Yes
LV	None		LAKRS	No
NL	FNV Publiek Belang	CNV	None	Yes
PL	None		OZZGNG, PPZ Kadra, SPCh NSZZ Solidarność	No
PT	Sindiel		ASOSI, Fetese, Fiequimetal, Sinergia	No
RO	FS Gaz		UFS Atlas	Yes
SE	Seko		Ledarna, Sveriges Ingenjörer, Unionen	n/a
SI	SDE		None	Yes
SK	POZ		None	Yes

Note: n/a, not applicable. Due to concerns over the reliability and comparability of the data, information regarding the ranking of organisations needs to be treated with caution.

Source: Network of Eurofound Correspondents

⁹ The Austrian trade union GPA-djp is affiliated to both IndustriAll Europe and EPSU, however, according to the information provided by GPA-djp, only to IndustriAll Europe for its gas sector members.

¹⁰ The Danish trade union 3F is also affiliated to EPSU, however, according to the information provided by 3F, not for its members in the gas sector.

Representativeness of the European social partner organisations: Gas sector

Ten trade unions are only represented by EPSU in the gas sector ESSDC (younion in Austria, Gazelco in Belgium, SSKH in Croatia, OS UNIOS and SOSE in Czechia, ver.di in Germany, JHL in Finland, POZ in Slovakia, SDE in Slovenia and Seko in Sweden) (Table 20). In Czechia, Slovakia and Slovenia, all sector-related trade unions are only affiliated to EPSU. In Lithuania, the only sector-related trade union is a member of EPSU, and also affiliated to IndustriAll Europe. Indeed, there are 16 sector-related trade unions that are affiliated to both EPSU and IndustriAll Europe.

Table 20: Sector-related trade unions affiliated to EPSU: coverage and rankings

Country	Trade unions affiliated to EPSU for their members in the gas sector	Activities coverage	Private and public coverage	Ranking (by number of members in the sector) ^a
AT	younion, (<i>GPA-djp not for gas members</i>)	All	Both (<i>GPA-djp private only</i>)	3, (<i>GPA-djp 1</i>)
BE	Gazelco	All	Private only ^b	2
BE	ACV-CSC CNE	All	Private only ^b	3 or 4
BG	НФХ КТ Подкрепа	35.2 and 35.3	Public only ^c	2
CZ	OS UNIOS, SOSE	35.2 and 35.3	Both	1, 2
DE	ver.di	35.3	Both	2
DK	(<i>3F not for gas members</i>)	35.2 and 35.3	Both	No sectoral coverage
ES	ELA, UGT-FICA ¹¹	All	Private only ^b	4
FI	JHL	35.2	Private only	2
FR	CFE-CGC Energies, FNEM-FO, FNME-CGT	All	Private only ^b	1, 2, 4
HR	SSKH	35.2 and 35.3	Both	2
IE	SIPTU, Unite	35.2 and 35.3	Both	1, 3
IT	Femca-Cisl, Filctem-Cgil	All	Both	1, 2
LT	LPPSF	35.2 and 35.3	Both	1
LU	OGB-L	All	Both	1
NL	FNV Publiek Belang	All	Private only	1
PT	Sindel	35.2 and 25.3	Private only ^b	2
RO	FS Gaz	All	Both	2
SE	Seko	No data	Both	No data
SI	SDE	All	Both	1
SK	POZ	All	Both	1

Notes: ^a Rankings and organisations are not necessarily listed in the same order due to concerns over comparability of data. ^b No separate public gas sector company was reported. ^c No separate private gas sector company was reported.

Source: Network of Eurofound Correspondents

Out of 26 EPSU members in the gas sector, 11 cover workers in all subsectors of the gas sector. Seven EPSU members cover workers in distribution and trade in gas, and two cover a single subsector each (for other members, activities coverage was not available).

¹¹ UGT-FICA is a member of EPSU and of IndustriAll Europe.

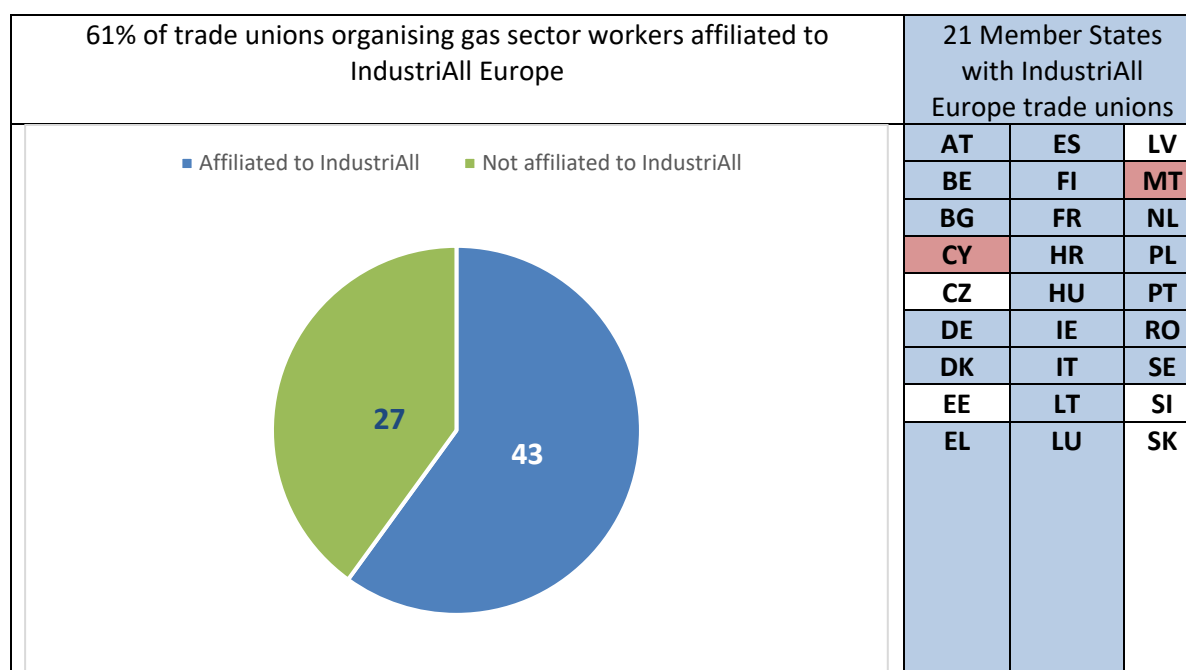
Half of the 26 EPSU members in the gas sector cover workers in both public and private companies. Five members cover workers only in the private sector; however, here no separate public gas sector companies exist. One member covers workers in the public sector only; however, here no separate private gas sector companies exist.

As distribution and trade in gas are the two main activities in the gas sector, most EPSU affiliates cover both. Only ver.di in Germany organises workers in only trade activities, not distribution. JHL in Finland organises only the distribution of gas, not trade in it.

3.2. Membership domain of IndustriAll Europe

IndustriAll Europe is affiliated to the ETUC and represents workers in the manufacturing, mining and energy sectors, including the gas industry, across Europe.¹² As a multi-industry federation, the representational domain of IndustriAll Europe also covers the gas sector under review here.

Figure 13: IndustriAll Europe representing trade unions organising gas sector workers, 2019–2020



Notes: As IndustriAll Europe organises workers in several different economic sectors, it also represents trade unions in other sectors in all 27 Member States. However, this figure only includes gas sector-related trade unions from 19 countries. Colour coding: in the countries shaded in red, there are no gas sector activities; in the countries shaded in blue, there is at least one gas sector trade union affiliated to IndustriAll Europe for its gas sector members.

Source: Network of Eurofound Correspondents

Of the 70 national trade unions active in the gas sector, 43 (61%) are members of IndustriAll Europe (Figure 13). If we consider membership data, as far as they are available, IndustriAll Europe's affiliates represent

¹² In the statutes of IndustriAll Europe, membership and affiliation are defined in Articles 7 and 8. Member trade unions are required to be democratic and independent, and affiliated to a national cross-sector trade union confederation that is affiliated to the ETUC. The Executive Committee takes membership-related decisions and can decide, with a two-thirds majority, to make an exception to the required affiliation to a cross-sector confederation that is a member of the ETUC. The statutes of IndustriAll Europe only provide for full membership. See https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef18027en.pdf

Representativeness of the European social partner organisations: Gas sector

some 49,000 workers out of almost around 66,000 unionised workers in the gas industry (see section 2.1), or 74% of all gas sector union members. IndustriAll Europe has members in 21 Member States.¹³ In 18 of the 24 Member States with sector-related trade unions, the trade union with most members in the gas industry is affiliated to IndustriAll Europe. Sindel, in Portugal, is a member of IndustriAll Europe, but for its gas sector members it is only affiliated to EPSU. Of the 43 other members of IndustriAll Europe, almost all (40) engage in collective bargaining and 36 take part in some sort of social consultation, mostly on a regular basis. Among the IndustriAll Europe affiliates, only the Greek ΠΟΕ (POE) and the Danish IDA do not take part in collective bargaining (see section 2.2).

Table 21: Sector-related trade unions affiliated to IndustriAll Europe

Country	Trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe	Is the trade union with most members in the sector affiliated to IndustriAll Europe?
AT	GPA-djp, PRO-GE	younion	Yes
BE	ACLBV-CGSLB, ACV-CSC BIE, ACV-CSC CNE	Gazelco	Yes
BG	НФТ “Химия и индустрия”, НФХ КТ Подкрепа	None	Yes
CZ	None ¹⁴	OS UNIOS, SOSE	No
DE	IGBCE	ver.di	Yes
DK	IDA, Metal, 3F	None	Yes
EE	No trade unions		
EL	ΠΟΕ (POE) ¹⁵		Yes
ES	CCOO Industria, ELA, FI-USO, UGT-FICA	None	Yes
FI	Pro, TEK	JHL, YTN	Yes
FR	CFE-CGC Energies, FCE-CFDT, FNEM-FO, FNME-CGT, CFTC-CMTE	SUD Energies, UNSA Energie	Yes
HR	SING, EKN	SDPPTH, SSKH	Yes
HU	VDSZ	None	Yes
IE	Connect, SIPTU, Unite	None	Yes
IT	Femca-Cisl, Filctem-Cgil, Uiltec-Uil	None	Yes
LT	LPPSF	None	Yes
LU	LCGB, OGB-L	None	Yes

¹³ Only gas sector trade unions are considered here. Looking at all sectors, IndustriAll Europe has member unions in all 27 EU Member States.

¹⁴ OS Echo is affiliated to IndustriAll Europe, but it reports not having members in the gas sector in Czechia.

¹⁵ EDA Attikis, EDA Thessalonikis Thessalias, Zenith, ΣΕΔΕΠΑ (Sedepa), ΣΕΔΕΣΦΑ (Sedesfa) are member organisations of the Panhellenic Energy Federation ΠΟΕ (POE). As such they are indirectly represented by industriAll Europe through POE.

Representativeness of the European social partner organisations: Gas sector

Country	Trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe	Is the trade union with most members in the sector affiliated to IndustriAll Europe?
LV	None	LAKRS	No
NL	FNV Publiek Belang	CNV	Yes
PL	PPZ Kadra, SPCh NSZZ Solidarność	OZZGNG	Yes
PT	Fiequimetal, (Sindel) ¹⁶	ASOSI, Fetese, Sinergia	Yes
RO	FS Gaz, UFS Atlas	None	Yes
SE	Sveriges Ingenjörer, Unionen	Ledarna, Seko	n/a
SI	None	SDE	No
SK	None	POZ	No

Notes: n/a, not applicable. Due to concerns over the reliability and comparability of the data, information regarding the size ranking of organisations needs to be treated with caution.

Source: Network of Eurofound Correspondents

There are 27 trade unions that are only represented by IndustriAll Europe in the gas sector ESSDC (GPA and PRO-GE in Austria; ACV BEI, ACLVB and CNE in Belgium; НФТ “Химия и индустрия” in Bulgaria; EKN and SING in Croatia; IG BCE in Germany; ΠΟΕ (POE) in Greece; 3F, IDA and Metal in Denmark; CCOO Industria and FI USO in Spain; TEK and Pro in Finland; FCE-CFDT and CFTC CMTE in France; VDSZ in Hungary; Connect in Ireland; Uiltec-Uil in Italy; SPCh NSZZ Solidarność and PPZ Kadra in Poland; UFS Atlas in Romania; Sveriges Ingenjören and Unionen in Sweden). Only in Denmark and Hungary are all the national sectoral trade unions only affiliated to IndustriAll Europe. In Bulgaria, Ireland, Italy, Lithuania, Luxembourg, the Netherlands and Romania, all national sector-related trade unions are affiliated to IndustriAll Europe, although some of them are also affiliated to EPSU. There are 16 sector-related trade unions that are affiliated to both IndustriAll Europe and EPSU.

Out of 43 IndustriAll Europe members in the gas sector, 10 cover workers in all subsectors of the gas sector. Seven members cover workers in distribution of and trade in gas, and two cover manufacture and distribution (for other members, activities coverage was not available).

More than half of the IndustriAll Europe members in the gas sector (22 out of 43) cover workers in both public and private companies. Eighteen members cover workers only in the private sector; however, here no separate public gas sector companies exist. Two members cover workers in the public sector only; however, here no separate private gas sector companies exist.

¹⁶ Sindel is affiliated to IndustriAll Europe, but for its gas sector members it is only affiliated to EPSU.

Table 22: Sector-related trade unions affiliated to IndustriAll Europe: coverage and rankings

Country	Trade unions affiliated to IndustriAll Europe	Activities coverage	Private and public coverage	Ranking (by number of members in the sector) ^a
AT	GPA-djp, PRO-GE	All	Private only	1, 2
BE	ACLVB-CGSLB, ACV-CSC BIE, ACV-CSC CNE	All	Private only ^b	1, 3, 4
BG	НФТ “Химия и индустрия”, НФХ КТ Подкрепа	35.2 and 35.3	Public only ^c	1, 2
DE	IG BCE	35.1 and 35.2	Private only	1
DK	IDA, Metal, 3F	All	Both	n/a
EL	ΠΟΕ (ΠΟΕ)	35.2 and 35.3	Both	1
ES	CCOO Industria, ELA, FI-USO, UGT-FICA	All	Private only ^b	1, 2, 3, 4
FI	Pro, TEK	35.2 and 35.3	Both	1
FR	CFE-CGC Energies, FCE-CFDT, FNEM-FO, FNME-CGT	All	Private only ^b	1, 2, 3, 4
HR	SING, EKN	35.2 and 35.3	Both	1, 4
HU	VDSZ	35.2 and 35.3	Both	1
IE	Connect, SIPTU, Unite	35.2 and 35.3	Both	1, 2, 3
IT	Femca-Cisl, Filctem-Cgil, Uiltec-Uil	All	Both	1, 2, 3
LT	LPPSF	35.2 and 35.3	Both	1
LU	LCGB, OGB-L	All	Both	1, 2
NL	FNV Publiek Belang	All	Private only ^b	1
PL	PPZ Kadra, SPCh NSZZ Solidarność	All	Both	1, 3
PT	Fiequimetal	35.2 and 35.3	Private only ^b	1
RO	FS Gaz, UFS Atlas	All	Both	1, 2
SE	Sveriges Ingenjörer, Unionen	35.1 and 35.2	Private only ^b	n/a

Note: n/a, not applicable. ^a Rankings and organisations are not necessarily listed in the same order. Due to concerns over the reliability and comparability of the data, information regarding the presence of social partner organisations in the public and private sectors and the ranking of organisations needs to be treated with caution. ^b No separate public gas sector company was reported. ^c No separate private gas sector company was reported.

Source: Network of Eurofound Correspondents

As the distribution and trade activities are the largest parts of the gas sector, most of the affiliates of IndustriAll Europe organise both. Only IG BCE in Germany, and Unionen and Sveriges Ingenjörer in Sweden, only organise workers in the distribution activities, not in trade in gas.

3.3. Sector-related trade unions affiliated to neither EPSU nor IndustriAll Europe

Table 23 shows the national sector-related trade unions that are not affiliated to EPSU or IndustriAll Europe. In total, there are 11 such trade unions in seven Member States (or around 16% of all sector trade unions in the EU27). Such unions are usually not among the larger national trade unions. Only LAKRS in Latvia appears to be the largest trade union in the gas sector, CNV in the Netherlands and OZZGNG in Poland are the second largest national trade unions in the gas sector.

Table 23: Sector-related trade unions that are not affiliated to EPSU or IndustriAll Europe

Country	Trade union	Ranking
FI	YTN	no data
FR	SUD Energies	6
	UNSA Energie	5
HR	SDPPTH	3
LV	LAKRS	1
NL	CNV	2
PL	OZZGNG	2
PT	ASOSI	no data
	Fetese	no data
	Sinergia	3
SE	Ledarna	no data

Notes: Due to concerns over the reliability and comparability of the data, information regarding the ranking of organisations needs to be treated with caution.

Source: Network of Eurofound Correspondents

3.4. Membership domain of Eurogas

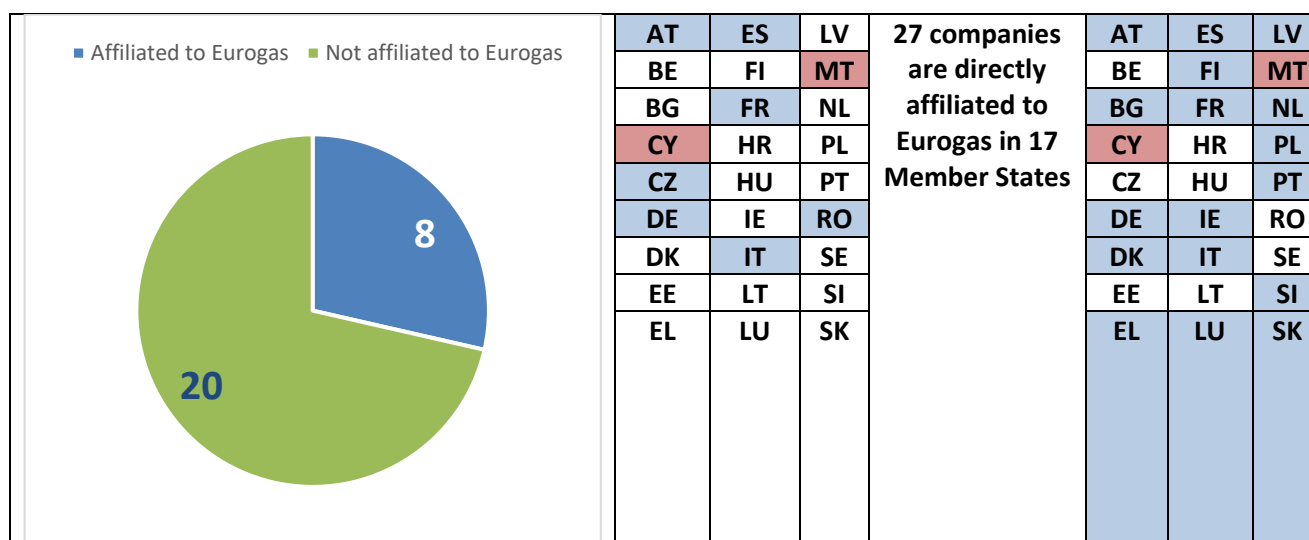
Eurogas is an association representing the European gas wholesale, retail and distribution sector. The representational domain of Eurogas is congruent with the gas sector under review here. Eurogas organises both companies and associations.

Of the 28 national employer and business associations in the gas sector, 8 (28%) are members of Eurogas (Figure 14). If we consider membership data, as far as they are available, Eurogas's affiliate employer organisations represent some 582 out of 849 companies affiliated to sector-related associations in the gas industry, or 69% of all affiliated companies in the sector. Eurogas has employer organisation members in seven Member States.

Figure 14: Eurogas representing gas sector employer organisations and companies, 2019–2020

28% of employer organisations organising gas sector companies are affiliated to Eurogas	7 Member States with Eurogas members		Member States with companies directly affiliated to Eurogas
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Representativeness of the European social partner organisations: Gas sector



Note: Colour coding: in the countries shaded in red, there are no gas sector activities; in the countries shaded in blue, there is at least one gas sector trade union affiliated to Eurogas for its gas sector members.

Source: Network of Eurofound Correspondents

In 5 of the 16 Member States with sector-related employer associations, the association with the most members in the gas industry is affiliated to Eurogas (Table 24). Of the eight employer organisations that are members of Eurogas, two engage in collective bargaining and six take part in some sort of social consultation, mostly on a regular basis.

Table 24: Sector-related employer associations affiliated to Eurogas

Country	Employer associations affiliated to Eurogas	Employer associations not affiliated to Eurogas	Is the employer association with most members in the sector affiliated to Eurogas?
AT	FWG	None	Yes
BE	None	FEPEG, Synergrid	No
BG	No employer associations		
CZ	ČPS	None	Yes
DE	BDEW, Zukunft Erdgas	VAEU, BVEG	No
DK	None	DI	No
EE	None	Eesti Gaasiliit	No
EL	No employer associations		
ES	Sedigas	None	No
FI	None	Energiategaallisuus	No
FR	AFG	UNEmIG	Yes
HR	No employer associations		
HU	No employer associations		
IE	No employer associations		
IT	Anigas	Assogas, Energia Libera, IGAS, Utilitalia	No
LT	None	NLEA	No
LU	No employer associations		
LV	No employer associations		

Representativeness of the European social partner organisations: Gas sector

Country	Employer associations affiliated to Eurogas	Employer associations not affiliated to Eurogas	Is the employer association with most members in the sector affiliated to Eurogas?
NL	None	EN, WENB	No
PL	No employer associations		
PT	No employer associations		
RO	ACUE	FPGC	No
SE	None	EFA, Sobona	No
SI	None	EZS	No
SK	None	SPNZ	No

Notes: Due to concerns over the reliability and comparability of the data, information regarding the ranking of organisations needs to be treated with caution. Blue shading indicates affiliation to Eurogas.

Source: Network of Eurofound Correspondents

Of the eight employer organisation members of Eurogas, four cover all activities in the sector, whereas three report having members in the distribution and trade activities (for the remaining one, this information is not available; see Table 25). Three Eurogas members cover both the public and private sectors, and four cover only the private sector (although public sector companies are not reported to exist in their countries).

Table 25: Sector-related employer associations affiliated to Eurogas: coverage and rankings

Country	Employer associations affiliated to Eurogas	Activities coverage	Private and public coverage	Ranking ^a
AT	FWG	All	Both	1
BE	None	None	None	not the case
BG	No employer associations			
CZ	ČPS	35.2 and 35.3	Both	1
DE	BDEW, Zukunft Erdgas	All	Private only ^b	No membership data available
DK	None	None	None	Not the case
EE	None	None	None	Not the case
EL	No employer associations			
ES	Sedigas	35.2 and 35.3	Private only ^b	1
FI	None	None	None	Not the case
FR	AFG	All	Private only	1
HR	No employer associations			
HU	No employer associations			
IE	No employer associations			
IT	Anigas	35.2 and 35.3	Private only	2
LT	None	None	None	Not the case
LU	No employer associations			
LV	No employer associations			
NL	None	None	None	Not the case

Representativeness of the European social partner organisations: Gas sector

Country	Employer associations affiliated to Eurogas	Activities coverage	Private and public coverage	Ranking ^a
PL	No employer associations			
PT	No employer associations			
RO	ACUE	All	Both	2
SE	None	None	None	Not the case
SI	None	None	None	Not the case
SK	None	None	None	Not the case

Notes: ^a Rankings and organisations are not necessarily listed in the same order. Due to concerns over the reliability and comparability of the data, information regarding the presence of social partners organisations in the public and private sectors and the ranking of organisations needs to be treated with caution. ^b No separate public gas sector company was reported.

Source: Network of Eurofound Correspondents

Besides employer organisations, Eurogas also has member companies in different EU countries (Table 26). These include 27 companies in 17 countries. Together they employ almost 80,000 employees. However, these companies do not operate exclusively in the gas sector, as 18 extend their activities to other energy sectors. Nevertheless, they include significant national players in the gas sector, and they contribute to the membership basis of Eurogas, as they cover countries where Eurogas has no affiliated organisations (Bulgaria, Greece, Ireland, Luxembourg, Latvia, Netherlands, Poland, Portugal, Slovenia and Slovakia) and include companies that are not affiliated to the national members of Eurogas (for instance, RWE and Thüga in Germany).

Table 26: Sector-related companies affiliated to Eurogas

Country	Company	Employees	Sectors	Overlap	Collective bargaining	Social dialogue	Among largest
AT	Wiener Netze	2,400	Distribution and trade	Electricity, heat	Yes	n/a	Yes
BG	Glavbolgarstroy	n/a	Construction of gas sites	Construction in different economic sectors	n/a	n/a	Yes
DE	Gasag	1,787	Distribution and trade	Electricity, heat and water supply	Yes	n/a	No
	RWE Supply & Trading	1,600	Trade	Electricity trade, trade in raw materials and emission certificates	Yes	n/a	No
	Thüga	20,300	Distribution and trade	Electricity and water supply	Yes	n/a	Yes
	Uniper	5,155	Distribution and trade	Electricity production and energy distribution and services	No	Ad hoc	Yes
	VNG	1,200	Distribution and trade	None	No	n/a	No
	Wintershall Dea	2,847	Manufacture, distribution and trade	Oil	Yes	n/a	No

Representativeness of the European social partner organisations: Gas sector

Country	Company	Employees	Sectors	Overlap	Collective bargaining	Social dialogue	Among largest
DK	Evida	n/a	Distribution and trade	None	Yes	No	Yes
EL	DEPA	200	Trade	None	Yes	No	Yes
ES	Naturgy	509	Manufacture, distribution and trade	Electricity	Yes	No	Yes
FI	Wartsila	No data for gas sector only, 18,000 in total	Manufacture, distribution and trade	Electricity, energy, maritime solutions	Yes	n/a	No
FR	ENGIE	4,000	Distribution and trade	Electricity, renewable energy, energy services	Yes	Ad hoc	Yes
	GRDF	12,595	Distribution	None	Yes	Regular	Yes
	Total	2,000	Distribution and trade	Petrol, renewable energies	Yes	Ad hoc	No
IE	GNI	550	Distribution	None	Yes	Ad hoc	Yes
IT	Edison	N/A	Manufacture and trade	Electricity	Yes	Ad hoc	No
	ENI	14,392	Manufacture, distribution and trade	Electricity, oil and chemicals	Yes	Regular	Yes
LU	Enovos	N/A	Manufacture, distribution and trade	Renewable energy	Yes	No	No
LV	LG	N/A	Distribution and trade	None	Yes	Regular	Yes
NL	Gasterra	140	Trade	None	Yes	Ad hoc	Yes
PL	PGE	~40,000	Distribution	Energy	Yes	n/a	Yes
PT	Galp Gás Natural Distribuição	N/A	Distribution	None	Yes	n/a	Yes
	Portgás	N/A	Distribution	None	Yes	n/a	Yes
SI	Geoplin	42	Distribution and trade	Trade in fuels	Yes	No	Yes
SK	SPP	N/A	Distribution and trade	Electricity	Yes	Regular	Yes
	SPP-D	1,898	Distribution	None	Yes	Regular	Yes

Note: n/a, not applicable.

Source: Network of Eurofound Correspondents

Furthermore, there are 16 employer organisations in the gas sector that are not affiliated to Eurogas, in 11 Member States (Table 27). In 10 Member States, the employer organisation not affiliated to Eurogas is the largest employer organisation in the gas sector.

Table 27: Sector-related employer associations not affiliated to Eurogas: size rankings

Country	Organisation	Ranking
BE	FEBEG	1
	Synergrid	2

Representativeness of the European social partner organisations: Gas sector

DE	VAEU	1
DK	DI	1
EE	Eesti Gaasiliit	1
IT	Energia Libera	Can be considered the largest EO if public and private parts of the sector are jointly taken into account
	IGAS	3
	Utilitalia	1
	Assogas	4
LT	NLEA	1
NL	WENB (Energie Nederland is a member of WENB)	1
RO	FPGC	1
SE	EFA	1
	Sobona	2
SI	EZS	1
SK	SPNZ	1

Note: Due to concerns over the reliability and comparability of the data, information regarding the ranking of organisations needs to be treated with caution.

Source: Network of Eurofound Correspondents

3.5. Gas sector representativeness of EPSU, IndustriAll Europe and Eurogas

Table 28 shows the representation of EPSU, IndustriAll Europe and Eurogas in the countries with the highest shares of the EU gas sector workforce. These countries have more than 80% of the total employees in the sector, according to Eurostat data for 2018. The representational basis of the three European social partners seems well established there, with a significant presence of affiliated organisations, usually participating in collective bargaining. Moreover, it should be underlined that there are no other EU organisations that appear to be related to the gas sector.

Table 28: Membership of EPSU, IndustriAll Europe and Eurogas in the countries with the highest shares of sector-related workers in the EU27 sector workforce

Country	Trade unions affiliated to EPSU	Involved in collective bargaining	Trade unions affiliated to IndustriAll	Involved in collective bargaining	Employer organisations affiliated to Eurogas	Involved in collective bargaining
DE	1 out of 2	Yes	1 out of 2	Yes	3 out of 4	Yes
PL	0 out of 3	Not the case	2 out of 3	Yes	No employer organisation – direct company members	Company member involved in single-employer bargaining (see Table 26)
IT	2 out of 3	Yes	3 out of 3	Yes	1 out of 5	Yes
FR	3 out of 7	Yes	4 out of 7	Yes	2 out of 2	Yes

Representativeness of the European social partner organisations: Gas sector

Country	Trade unions affiliated to EPSU	Involved in collective bargaining	Trade unions affiliated to IndustriAll	Involved in collective bargaining	Employer organisations affiliated to Eurogas	Involved in collective bargaining
RO	1 out of 2	Yes	2 out of 2	Yes	1 out of 2	No multi-employer collective bargaining
ES	1 out of 4	Yes	4 out of 4	Yes	1 out of 1	No

Source: Network of Eurofound Correspondents

The situation is similar in the countries with the highest shares of national employment in the gas sector (Table 29), but overall gas sector employment has a small share of national employment. With the exception of Italy, these are usually smaller countries, with relatively weak and often decentralised industrial relations.

This is shown particularly by the case of Eurogas: in most of these countries either there are no employer organisations (Croatia, Latvia and Poland) or there is no multi-employer collective bargaining (Romania, Slovakia).

Table 29: Membership of EPSU, IndustriAll Europe and Eurogas in the countries with the highest shares of sector-related workers in the national workforce

Country	Trade unions affiliated to EPSU	Involved in collective bargaining	Trade unions affiliated to IndustriAll	Involved in collective bargaining	Employer organisations affiliated to Eurogas	Involved in collective bargaining
LV	0 out of 1	No	0 out of 1	No	No employer organisation	Company member involved in single-employer bargaining (see Table 26)
PL	0 out of 3	Not the case	2 out of 3	Yes	No employer organisation	Company member involved in single-employer bargaining (see Table 26)
HR	1 out of 3	Yes	1 out of 3	Yes	No employer organisation	No affiliated company
RO	1 out of 2	Yes	2 out of 2	Yes	1 out of 2	No multi-employer collective bargaining
IT	2 out of 3	Yes	3 out of 3	Yes	1 out of 5	Yes
SK	1 out of 1	Yes	0 out of 1	No	0 out of 1	No multi-employer collective bargaining

Source: Network of Eurofound Correspondents

Table 30 summarises the key findings. There are 70 sector-related national trade unions in 24 Member States, of which 26 (37%), in 21 countries, are affiliated to EPSU. If we consider collective bargaining, 26 of the 68 trade unions participating in collective bargaining in the gas sector are EPSU affiliates, covering 19 of the 24 countries where collective bargaining takes place. Similarly, 24 of the 51 trade unions in 16 of the 21 countries where trade unions are consulted on sector-related policies are EPSU affiliates. IndustriAll Europe has 42 members (60% of the total) in 19 countries. Among its affiliates, 40 participate in collective bargaining (59% of the 68 organisations involved in sector-related negotiations). Thirty-four of its affiliates are consulted on sector-related policies, in 18 of the 19 countries where such consultations take place.

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Together EPSU and IndustriAll Europe have 54 single members, representing 77% of all sector-related unions, in 23 countries. Fifty-five of their affiliates are involved in collective bargaining in 22 countries, and 45 affiliates take part in sector-related consultations in 18 countries, representing some 80% of all trade unions in around 90% of countries.

There are 28 sector-related national employer organisations in 16 Member States, of which 8 in 7 countries are affiliated to Eurogas. Two affiliates of Eurogas take part in collective bargaining, in four countries out of the eight where such negotiations take place. Eurogas's affiliates participate in sector-related consultations with governments in 7 countries (out of 17). These are 8 associations out of 26 in the sector.

Table 30: Sector-representativeness of EPSU, IndustriAll Europe and Eurogas

Organisations	Number	Member States with organisations	Organisations involved in collective bargaining	Member States with organisations involved in collective bargaining	Organisations involved in policy consultation	Member States with organisations involved in policy consultation
All sector-related trade unions	70	24	68	4	51	20
Affiliates of EPSU	26	20	26	21	26	16
% affiliated to EPSU	37	83	83	84	53	80
Affiliates of IndustriAll Europe	42	19	40	19	36	18
% affiliated to IndustriAll Europe	60	79	59	76	71	90
EPSU and IndustriAll Europe together	54	23	54	22	45	18
% affiliated to EPSU and IndustriAll Europe together	77	96	80	88	78	90
All sector-related employer organisations	28	16	16	8	26	17
Organisations affiliated to Eurogas	8	7	2	4	8	7
% affiliated to Eurogas	28	44	13	50	31	41
Companies affiliated to Eurogas	27	17	22	14	n/a	n/a

Note: n/a, not applicable.

Source: Network of Eurofound Correspondents

3.6. Other sector-related organisations

This study identified no other EU organisations besides EPSU, IndustriAll Europe and Eurogas with members in the gas sector or affiliates involved in sector-related collective bargaining and/or consultations on sector-related policies. The additional affiliations of national sector-related trade unions to EU-level trade unions are linked to other sectors and to their overlapping representational domains.

The same is true of national employer associations and their affiliations to Eurogas and possibly to other associations, mainly in the energy sector. Moreover, national sector-related employer organisations might be members of specific sectoral associations, such as the ones listed in Table 31. Marcogaz, for example, is the technical association of the European gas industry, and the NGVA is the association for the natural gas

Representativeness of the European social partner organisations: Gas sector

vehicles industry. These European associations do not represent their members on topics related to working conditions of employees. Some do, however, work on health and safety aspects. None of them appears to cooperate with EPSU or IndustriAll Europe, or with any other association working on aspects related to working conditions. Consequently, Eurogas is not the only European association in the sector, but it is the only one that takes up the role of representing the employers in the sector as a European employer organisation. Eurogas cooperates closely with Marcogaz, GERG and some of the other associations listed in the table.

Table 31: Other European associations in the gas sector

Association	Membership	Countries
GERG European Gas Research Group www.gerg.eu/	24 member companies – mainly those managing national distribution infrastructure, and some gas-producing companies	Member companies in 10 Member States
GIE Gas Infrastructure Europe https://www.gie.eu/dna/members/	Represents interests of infrastructure operators active in natural gas transmission, storage and LNG regasification. Its internal structure has three columns corresponding to the types of infrastructure activities represented, namely GTE (Gas Transmission Europe), GSE (Gas Storage Europe) and GLE (Gas LNG Europe)	67 member companies from 22 Member States
Marcogaz https://www.marcogaz.org/about/our-members/	Represents interests of associations and companies on technical aspects of the gas systems value chain	24 members from 16 Member States
Gas Naturally www.gasnaturally.eu	8 European and international associations: GERG, GIE, IOPG, IGU, Liquid Gas Europe, Marcogaz, NGVA Europe and Eurogas	EU and worldwide associations
IOPG International Association of Oil & Gas Producers https://www.iogp.org	80 member companies, 30 of them in the EU. IOPG members produce 40% of the world's oil and gas, and 90% of Europe's indigenous supplies. Forum for sharing experiences, including on health and safety and social responsibility	Multinational companies producing oil and gas
IGU International Gas Union https://www.igu.org/charter-members/	Associations and companies from around the world	23 Member States
Liquid Gas Europe https://www.liquidgaseurope.eu/members	Associations representing interests on LPG from 17 countries and 7 multinational LPG-producing companies	16 Member States
NGVA Europe Natural & Bio Gas Vehicle Association https://www.ngva.eu/who-we-are/	Represents the interests of companies distributing bio-gas and LNG for vehicles, fuel stations, etc.	24 Member States

Notes: LNG, liquid natural gas; LPG, liquefied petroleum gas.

Sources: Network of Eurofound Correspondents and own web research

3.7. Negotiating capacity of Eurogas, EPSU and IndustriAll Europe

Eurogas was established in 1990. In recent years it has simplified its membership structure to only two different types of members: employer organisations and member companies. Its new statutes were published in the *Belgian State Gazette* on 4 April 2019; they apply the 23 March 2019 Belgian Code of Companies and Associations.

Eurogas has been a member of the gas ESSDC since it was established in 2007. It has 12 staff members, of whom 4 are regularly involved in activities of the ESSDC. Some 95% of its funding comes from the membership fees of its affiliated organisations. It has a publicly available website, but no members-only intranet.

The main statutory bodies are the Eurogas general assembly and its board of directors, which is also called the management board. Decision-making in both statutory bodies is supposed to be by unanimity. If no consensus can be reached in the management board, a decision can be taken by a two-thirds majority of the members present. Any resolution concerning questions relating to decisions emanating from EU authorities can be adopted by a simple majority of the full members based in the EU. A quorum of at least half of the members needs to be present for valid decision-making (Article 4 of the Eurogas statutes of 2019).

Eurogas claims to have the authority to negotiate on behalf of the affiliated employer organisations and companies. The decision-making procedures available are described in the statutes, in terms of decisions of the general assembly and management board in general, not specifically for the agreement of texts from European social dialogue. Within Eurogas there is a Gas Advocacy Group that works on ESSDC issues as a working committee. Issues that need formal approval within Eurogas are approved within the Eurogas Strategy Committee and sent to the board for ratification. The 2020 joint statement on just transition, for example, was discussed within the Gas Advocacy Group and approved by the board. Members were kept informed by email, and this is also how decisions were taken.

EPSU has a proven capacity to negotiate based on its activities in other sectors. EPSU's constitution¹⁷ stipulates that its positions in sectoral social dialogue are to be based on policies adopted by Congress. Congress and the Executive Committee are EPSU's highest governing bodies. Congress, the supreme body, meets in ordinary session at least every five years and decides on core matters. The Executive Committee manages EPSU's affairs between Congresses. It meets at least twice a year and determines EPSU's mandate in the intersectoral and sectoral social dialogues.

In relation to the sectoral social dialogue, EPSU proposes a subject for discussion with sectoral employers or accepts a proposal from sectoral employers. The standing committees take such a decision based on general adopted EPSU policy and EPSU's programme of priorities. The standing committees decide on the issues it wishes to see covered. A negotiating team is nominated for the preparation of a joint position if necessary. It is nominated by the relevant standing committee, ensuring an appropriate balance between kinds of expertise on the subject, regions, and women and men. The team includes a representative of the EPSU secretariat. The EPSU secretariat can draft proposals/responses.

The EPSU delegation to the gas sectoral social dialogue committee is composed of members of the relevant standing committee, including representatives of all EU countries as far as possible. The delegation reports to the standing committee. All affiliates in the gas sector are informed and consulted on positions taken in the sectoral social dialogue committees. The standing committee considers the final result of a sectoral negotiation. It forwards a recommendation to adopt or reject, for approval by the Executive Committee.

IndustriAll Europe was created in June 2012, by the decision of the affiliates of the European Metalworkers Federation (EMF), the European Mine, Chemical and Energy Workers' Federation (EMCEF) and the European Trade Union Federation: Textile, Clothing, Leather and Footwear (ETUF:TCL) to join forces. Initially, EMCEF represented workers on the gas ESSDC before 2012; EMCEF had been a member of the ESSDC since 2007. When EMCEF, EMF and ETUF:TCL decided to join forces as IndustriAll Europe, IndustriAll

¹⁷ EPSU's constitution is available in six languages at <https://www.epsu.org/de/node/6170>

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Europe became a member of ESSDC as a successor organisation. IndustriAll Europe has 25 staff members, of whom 2 are regularly involved in activities related to the gas sector European social dialogue. In terms of its autonomy, 95% of IndustriAll Europe's budget is based on membership fees of the member organisations. It has a website with a members-only section to share internal documents regarding meetings and policy documents for internal consultations, and it also contains databases for internal use. IndustriAll Europe deals with topics related to the gas sector in its Energy Network, as well as in its industrial policy committee, its collective bargaining committee and its company policy committee. There are strong links between these committees and the gas ESSDC.

The promotion of social dialogue at all levels, and in particular at sectoral level, is mentioned in IndustriAll Europe's statutes.¹⁸ IndustriAll Europe acts as an agenda setter within sectoral social dialogue, and promotes joint strategies for the sustainable development of the gas sector. Besides this, its involvement in European sectoral social dialogue is explicitly mentioned in its statutes and clearly indicated in other documents, such as congress documents and its website.

Furthermore, IndustriAll Europe's statutes provide for detailed mandate procedures in relation to the nominations to the ESSDCs in various sectors. According to Appendix II of the statutes:

the affiliates concerned can nominate members depending on the number of mandates in the working groups and plenary of the sectoral social dialogue. The delegation shall be composed taking into account sectoral and regional representativeness.

Moreover, the appendix also stipulates the procedure for platforms and statements in the sectoral social dialogue, obliging the sectoral social dialogue members to 'propose and prepare possible platforms and statements in close cooperation with the Secretariat' of IndustriAll Europe. Thereby, the 'members [of the sectoral social dialogue] shall act in line with the policies and procedures as agreed by the Executive Committee and Congress' as the highest bodies within the European federation in order to guarantee the participation of all national member unions in matters of the European social dialogue.

With regard to the internal mandate procedure for negotiations in the framework of the sectoral social dialogue, the Secretariat is responsible for informing the Executive Committee and the Social Dialogue Committee about the possibility of entering negotiations, while the 'Executive Committee shall decide, in consultation with the Social Dialogue Committee members, whether negotiations should take place...'. At the suggestion of the Secretariat, 'The decision on the platform [for negotiations] and the delegation shall be taken by the Executive Committee in consultation with the Social Dialogue Committee and all the affiliates possibly via a written procedure and by a two-thirds majority.'

IndustriAll Europe has, thus, a well-defined procedure for obtaining a mandate and getting European sectoral social dialogue texts approved by its member organisations. It has the authority to negotiate binding agreements, such as the European Network on Silica (NEPSI) agreement,¹⁹ which, however, does not cover workers in the gas sector. No binding European sectoral social dialogue agreements have yet been reached specifically for the gas sector.

Six joint texts have been agreed between EPSU, IndustriAll Europe and Eurogas, listed in Table 32.

¹⁸ IndustriAll Europe's statutes are available in three languages at <https://news.industrialall-europe.eu/p/congress-doco>

¹⁹ This is the agreement on workers' health protection through the good handling and use of crystalline silica and products containing it.

Table 32: Joint documents produced by the gas ESSDC, 2007–2020

Title	Type	Date
Joint statement on just transition	Joint opinion	23 November 2020
Contribution regarding Energy Roadmap 2050	Joint opinion	9 December 2011
Toolkit: Demographic change, age management and competencies in the gas sector in Europe	Tool	15 October 2009
Joint declaration on violence at work	Declaration	15 November 2007
Common declaration of EMCEF, EPSU and Eurogas on ECOTEC study on the impact on employment in EU25 of the opening of electricity and gas markets, and of key EU directives in the field of energy	Declaration	15 November 2007
Rules of procedure of the Social Dialogue Committee for the natural gas sector	Procedural text	15 June 2007

Source: European Commission, Social dialogue texts database

3.8. Effective participation in European Social Dialogue meetings

Looking at participation in the ESSDC for the gas sector in 2019 and 2020 (Table 33), the trade union side had participants from 10 Member States and the employer delegation had participants from 7 Member States. This has to be considered in the context of the COVID-19 pandemic situation, when online participation modes may have restricted effective participation in the ESSDC's activities.

In 2019 there was only one meeting, in October. In 2020 the gas ESSDC held three meetings, one in January, one in September and one in November.

Table 33: Effective participation in the ESSDC for the gas sector, 2017–2018

Category of Member States	In 2019	In 2020	In either 2019 or 2020
Trade union participation in the ESSDC for the gas sector in 2019	10 Member States BE, CZ, DE, ES, FR, HU, IT, PT, RO, SK	8 Member States BE, CZ, ES, FR, HU, IT, PT, RO (+ Norway)	10 Member States BE, CZ, DE, ES, FR, HU, IT, PT, RO, SK
EPSU has an affiliate but no participation in ESSDC	AT, BG, FI, HR, IE, LT, NL, SE, SI, SK		
IndustriAll Europe has an affiliate but no participation in the ESSDC	AT, BG, DK, EL, FI, HR, IE, LT, LU, NL, PL, SE		
Employer participation in the ESSDC for the gas sector in 2019	6 Member States BE, CZ, DE, ES, FR, RO	6 Member States CZ, DE, ES, FR, IT, RO (+ Norway)	7 Member States BE, CZ, DE, ES, FR, IT, RO
Eurogas has an employer organisation affiliated but no participation in the ESSDC	AT, BG		
Eurogas has a company affiliated but no participation in the ESSDC	DK, EL, IE, LU, LV, NL, PT, SI, SK		

Note: Colour coding: the black rows indicate the EU countries that have participants in the ESSDC meetings; the red rows indicate the countries where the EU social partner organisations have national affiliates, but none of them participated in any of the ESSDC meetings in 2019 or 2020.

Sources: Eurofound and European Commission

Representativeness of the European social partner organisations: Gas sector

In Chapter 1 it was indicated that gas sector employment is highly concentrated in a small number of countries. The five largest workforces alone (Germany 21%, Poland 16.5%, Italy 16%, France 13.5% and Romania 8%) amounted in 2018 to some 75% of the overall EU workforce in the sector. Among those countries with relatively large proportions of the EU sectoral workforce, four of the five have been represented by both the trade union side and the employer side. Only for Poland was there no participation in any of the meetings in 2019 or 2020.

EPSU has affiliated sector-related trade unions in 10 Member States from which no trade union participated in a meeting of the ESSDC in either 2019 or 2020: Austria, Bulgaria, Croatia, Finland, Ireland, Lithuania, the Netherlands, Slovakia, Slovenia and Sweden. These 10 countries are written in red in Table 33. IndustriAll Europe has affiliated sector-related trade unions in 12 Member States from which none of them participated in any of the ESSDC meetings in 2019 or 2020: Austria, Bulgaria, Croatia, Denmark, Finland, Greece, Ireland, Lithuania, Luxembourg, the Netherlands, Poland and Sweden.

Eurogas has affiliated employer organisations in Austria and Bulgaria, from which in 2019 and 2020 there was no participation in the ESSDC. Adding the 9 Member States (Denmark, Greece, Ireland, Latvia, Luxembourg, the Netherlands, Portugal, Slovakia and Slovenia) where Eurogas has a company directly affiliated, but also no participation in the ESSDC meetings, gives 11 Member States with a Eurogas affiliate but no participation in the ESSDC meetings.

4. Conclusions

The gas sector employs more than 120,000 employees in the 25 countries covered by this study (Cyprus and Malta were excluded because they do not have any sectoral activities). With 82% of the EU gas sector workforce concentrated in six countries, the numbers of workers in the other Member States are relatively small. The group with the largest gas sector workforce is France, Germany, Italy, the Netherlands, Poland and Romania. Out of this group, Germany has the most workers in the sector (25,344), while the Netherlands has the fewest (8,000 workers). A second group of countries ranges between 2,000 and 4,500 workers in the sector, comprising Czechia, Hungary, Slovakia and Spain. In Austria, Bulgaria, Croatia, Denmark, Ireland, Latvia and Portugal, the sectoral workforce is between 700 and 1,999. That leaves the countries with gas sectoral workforces below 500: Belgium, Estonia, Finland, Greece, Lithuania, Luxembourg, Slovenia and Sweden. The rather small numbers of workers in the sector, in some of these countries, is to be taken into consideration when assessing the industrial relations landscape of the sector and the representativeness of the bodies.

The three parts of the gas sector are manufacture, distribution and trade in gas. Gas manufacture is limited. The workforce that is employed in this part is rather small, between 10% and 15% of the entire gas sector workforce. More precise numbers are not available, as for some countries the numbers of employees are rather small, and consequently data are not provided or not available. A large proportion of the EU's gas manufacture employment (91%) is in fact concentrated in Germany. Most gas sector workers are employed in distribution (52–55%) and trade (33–35%).

Large enterprises are common in the sector, and this facilitates industrial relations, the organisation of sectoral organisations and relatively wide coverage of collective bargaining. Indeed, density rates for both workers and employers are relatively high. However, the role played by large enterprises tends sometimes to push the collective bargaining structure to company level. In 13 of the 25 countries, there is single-employer bargaining only. This is the case in Bulgaria, Croatia, Czechia, Greece, Hungary, Ireland, Latvia, Lithuania, Luxembourg, Poland, Portugal, Romania and Slovakia. In 9 of these 13 countries there is also no sectoral employer's organisation and therefore bargaining cannot take place. No employer organisations were identified in Bulgaria, Croatia, Greece, Hungary, Ireland, Latvia, Luxembourg, Poland and Portugal. The four countries with a sectoral employer organisation but without multi-employer bargaining at sector level are Czechia, Lithuania, Romania and Slovakia. Romania has, besides company-level collective bargaining, a bipartite social dialogue body for the wider energy sector, in which the gas sector social partners are involved.

The only country without sector-related industrial relations is Estonia. There is no trade union organising the 246 persons working in the sector there. Consequently, no collective bargaining is possible there. This contrasts with the 11 Member States where sectoral-level industrial relations are well established, with multi-employer collective bargaining taking place between trade unions and employer organisations. Multi-employer sectoral-level negotiations only take place in Austria, Denmark, Finland, Slovenia and Sweden. A combination of multi-employer bargaining and company-level single-employer bargaining occurs in the gas sector in Belgium, France, Germany, Italy, the Netherlands and Spain.

This study identified 70 sector-related trade unions in 24 Member States (Estonia has no trade union, and Cyprus and Malta were not included in this study because they have no gas network). Sixty-eight of the 70 sectoral trade unions are involved in collective bargaining. In terms of

multisectoralism, 5 of the 70 gas sector trade unions (75%) also organise workers in the electricity sector. In 16 countries, all the gas sector trade unions also cover the electricity sector, while in 3 others only some of the sectoral trade unions represent both gas and electricity sector workers. Among the countries with the largest proportion of the sectoral workforce, France and Germany are in the first group, where all the gas sector trade unions also cover the electricity sector, while Italy, Poland and Romania are in the second group, where only some of the trade unions overlap with the electricity sector.

Besides the 70 sectoral trade unions, this study identified 23 employer organisations and 5 business associations, in total 28 organisations in 16 countries. The 23 employer organisations are involved in collective bargaining. The five other business associations are considered such because they are not involved in collective bargaining. Just like among the trade unions, most of the sector-related employer organisations have overlapping representational domains. This is due to the frequent expansion of representation to the energy and/or public utility sectors. Of these 28 organisations, 13 (46%) organise both gas and electricity employers. Looking at the six countries with the largest sectoral workforce, the Netherlands is the only one where all gas sector employer organisations also organise electricity sector employers. In the other countries with rather large sectoral workforces, some but not all of the employer organisations also organise electricity sector employers. Poland is among the countries with a relatively high sectoral workforce, but has no employer organisation or business association for the gas sector.

Industrial relations are well established in the gas sector, probably because of the legacy of former publicly owned enterprises and the importance of large companies. Collective bargaining happens in 24 countries – the only exception being Estonia, as mentioned above – and involves 68 trade unions and 16 employer organisations. Consultations involving the social partners and the government over sector-related policies take place in 20 countries, with the participation of 51 trade unions and 26 employer organisations.

At European level there are two sectoral trade union organisations, EPSU and IndustriAll Europe, and one European employer organisation, Eurogas.

There are 16 sectoral trade unions that are affiliated to both EPSU and IndustriAll Europe. Among them are eight that are the largest gas sector trade union in their country. These are UGT FICA from Spain, FNME CGT from France, SIPTU from Ireland, Filctem CGIL from Italy, LPPSF from Lithuania, FSZ Gas from Romania, OGBL from Luxembourg and FNV Publiek Belang from the Netherlands. This indicates the sectoral representativeness of both EPSU and IndustriAll Europe on the gas ESSDC. It has to be noted that the largest sectoral trade unions from four of the countries with the largest workforce are included in this group, the ones from France, Italy, the Netherlands and Romania. Besides these sectoral trade unions that are represented by both EPSU and IndustriAll Europe, there are also 29 gas sector trade unions that are only affiliated to IndustriAll Europe, and 9 that are only affiliated to EPSU.

IndustriAll Europe represents 43 sectoral trade unions (61%) in 21 Member States. Of them, 30 are only affiliated to IndustriAll Europe and 16 are affiliated to both IndustriAll Europe and EPSU. In 18 Member States the largest sectoral trade union is affiliated to IndustriAll Europe. In Belgium, Bulgaria, Croatia, Denmark, Finland, Germany, Greece, Poland and Portugal (nine Member States) the largest sectoral trade union is only affiliated to IndustriAll Europe. Among them are IG BCE from Germany and SPCh NSZZ Solidarność from Poland, which are the largest sectoral trade unions in two

of the countries with the largest sectoral workforces. Denmark is the only country for which all the sectoral trade unions are only affiliated to IndustriAll Europe. For Sweden it is not clear which trade union is the largest.

Based on the membership numbers provided, IndustriAll's affiliates represent some 49,000 of almost 66,000 unionised workers in the gas industry, or 74% of the total. Of the 42 members of IndustriAll, 40 engage in collective bargaining and 36 take part in some sort of social consultation, mostly on a regular basis.

Most of the IndustriAll Europe member unions organise in both distribution and trade activities. Only in Germany and Sweden does IndustriAll Europe only represent the workers in the distribution of gas, not in the trade activities. Thus, IndustriAll Europe has affiliates organising workers in the distribution of gas in 21 Member States, and workers in trade in gas in 17 Member States.

EPSU has 25 affiliated gas sector trade unions, in 19 Member States. Among them are 10 trade unions that are only represented by EPSU in the ESSDC, and 16 that are represented by both EPSU and IndustriAll Europe. Based on the membership numbers provided, EPSU's affiliates represent some 43,000 out of almost 66,000 unionised workers in the gas industry, or 65% of the total. The trade unions with most sectoral members are affiliated to EPSU in 11 Member States. In four Member States (Austria, Czechia, Slovakia and Slovenia) the largest sectoral trade union is only affiliated to EPSU. All of the 25 members of EPSU engage in collective bargaining, and 23 take part in some sort of social consultation, mostly on an ad hoc basis.

Most of the EPSU-affiliated unions organise workers in both the distribution of and trade in gas. Only in Germany does the EPSU affiliate only organise workers in trade activities. In Finland the EPSU affiliate only organises the workers in distribution activities. Thus, EPSU has members organising distribution activities in 18 Member States, and trade activities in 18 Member States.

IndustriAll and EPSU together have members in the seven countries with the highest shares of sectoral employment in the EU, and also have members in all but one of the countries with the highest incidence of sectoral employment. Neither IndustriAll nor EPSU has members in Latvia. In the other countries, EPSU and/or IndustriAll have members participating in collective bargaining. This study shows that no other EU trade union organisations have representativeness in the gas industry. This confirms that **IndustriAll and EPSU are the only representative European trade unions for the gas sector**. They both have a proven capacity to negotiate on behalf of the affiliated gas sector trade unions.

On the employers' side, **Eurogas** has 8 members among the 28 national employer and business associations in the gas sector. Eurogas's affiliates represent some 582 enterprises out of 849 affiliated to sector-related associations in the gas industry, or 70% of the total. Eurogas has members in seven Member States. In 5 of the 16 Member States with sector-related employer associations, the association with most members in the gas industry is affiliated to Eurogas. Of the 8 members of Eurogas, 2 engage in collective bargaining and 10 take part in some sort of social consultation, mostly on a regular basis. Besides employer organisations, Eurogas has 27 member companies in 17 EU countries. This contributes to consolidating the membership basis of Eurogas, as they cover countries where Eurogas has no affiliated organisations (Bulgaria, Greece, Ireland, Latvia, Luxembourg, the Netherlands, Poland, Portugal, Slovakia and Slovenia) and include companies that are not affiliated to the national members of Eurogas (for instance, RWE and Thüga in Germany).

Eurogas has an ad hoc basis for its capacity to negotiate joint opinions on behalf of all its members in the EU. Its statutes provide decision-making procedures for its management board in general. In practice, its gas advocacy group and/or strategy committee can give approval to joint opinions, subject to final approval by the Eurogas management board, without any formalised clear mandating or decision-making procedure specifically for such social partner texts.

This study has identified some other European associations in the sector and assessed what parts of the sector they organise and what kinds of interest they represent. This analysis shows that no other EU employer organisation is representative of the gas industry. This confirms that **Eurogas is the only representative European employer organisation for the gas sector.**

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Annex 1: List of trade unions and employer organisations in the gas sector

Table 34: National trade unions

Country	Abbreviation	Full name	English translation
AT	GPA-djp	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	Union of Private Sector Employees, Printing, Journalism and Paper
	PRO-GE	Produktionsgewerkschaft	Production (Manufacturing) Union
	<i>younion</i>	younion_Die Daseinsgewerkschaft	younion – The Existence Union
BE	ACLVB-CGSLB	Algemene Centrale Der Liberale Vakbonden – Centrale Générale des Syndicats de Belgique	General Federation of Liberal Trade Unions
	ACV-CSC BIE	ACV-CSC Bouw Industrie en Energie	ACV-CSC Construction, Industry and Energy
	ACV-CSC CNE	Centrale nationale des employés	National White-Collar Federation
	<i>Gazelco</i>	ABVV-FGTB Gazelco (ACOD-CGSP)	Gazelco
BG	НФТ “Химия и индустрия”	Национална федерация на труда “Химия и индустрия”	National Federation of Labour ‘Chemistry and Industry’
	НФХ КТ Подкрепа	Национална Федерация Химия	National Federation of Chemical Workers – at Podkrepa Confederation of Labour
CZ	<i>OS UNIOS</i>	Odborový svaz UNIOS	UNIOS
	<i>SOSE</i>	Svaz odborových sdružení Energie	Federation of Trade Unions Energie
DE	IGBCE	Industriegewerkschaft Bergbau Chemie Energie	Mining Chemicals and Energy Workers Union
	<i>ver.di</i>	Vereinte Dienstleistungsgewerkschaft	United Service Union
DK	3F	Fagligt Fælles Forbund	United Federation of Danish Workers
	IDA	Ingeniørforeningen i Danmark	The Danish Society of Engineers
	Metal	Dansk Metal	Danish Metalworkers’ Union
EL	EDA Attikis	Ένωση Εργαζομένων Φυσικού αερίου Αττικής	Employees’ Association of Natural Gas of Attica
	EDA Thessalonikis Thessalias	Ένωση Εργαζομένων Εταιρείας Διανομής Αερίου Θεσσαλονίκης-Θεσσαλίας	Employees’ Association of the Thessaloniki–Thessalia Distribution Company
	Zenith	Ένωση Εργαζομένων Εταιρείας Προμήθειας Αερίου Θεσσαλονίκης-Θεσσαλίας	Union of Employees of Supply Company of Thessaloniki–Thessalia
	ΠΟΕ (ΡΟΕ)²⁰	Πανελλήνια Ομοσπονδία Ενέργειας	Panhellenic Energy Federation (PEF)
	ΣΕΔΕΠΑ (Sedepa)	Σύλλογος Εργαζομένων στη ΔΕΠΑ	Employees’ Union in DEPA

²⁰ EDA Attikis, EDA Thessalonikis Thessalias, Zenith, ΣΕΔΕΠΑ (Sedepa), ΣΕΔΕΣΦΑ (Sedesfa) are member organisations of the Panhellenic Energy Federation ΠΟΕ (ΡΟΕ).

Representativeness of the European social partner organisations: Gas sector

Country	Abbreviation	Full name	English translation
	ΣΕΔΕΣΦΑ (Sedesfa)	Σύλλογος Εργαζομένων στη ΔΕΣΦΑ	Employees' Union of DESFA
ES	CCOO Industria	Comisiones Obreras Industria	Workers' Commissions, Industrial
	ELA	Euskal Langileen Alkartasuna	Solidarity of Basque Workers
	FI-USO	Federación de Industria de Unión Sindical Obrera (Sector Energía)	Federation of Industry of Workers' Trade Union (Energy Sector)
	UGT-FICA	Unión General de Trabajadores Federación de Industria Construcción y Agro	General Workers' Union, Federation of Industry, Construction and Agriculture
FI	JHL	Julkisten ja hyvinvointialojen liitto	The Trade Union for the Public and Welfare Sectors
	Pro	Proliitto	The Pro Trade Union
	TEK	Tekniikan Akateemiset	Academic Engineers and Architects in Finland
	YTN	Ylemmät Toimihenkilöt	Federation of Professional and Managerial Staff
FR	CFE-CGC Energies	CFE-CGC Energies	CFE-CGC Energies
	CFTC-CMTE	CFTC- Fédération Chimie Mines Textile Energie	CFTC – Federation of Chemistry, Mining, Textile and Energy
	FCE-CFDT	Fédération Chimie Energie – CFDT	Chemical and Energy Federation – CFDT
	FNEM-FO	Fédération nationale Energie et Mines – Force Ouvrière	National Federation of Energy and Mines – Labour Force
	FNME-CGT	Fédération nationale Mines Energie – CGT	National Federation of Mining and Energy
	SUD Energies	SUD Energies	SUD Energies
	UNSA Energie	UNSA Energie	UNSA Energy
HR	EKN	Samostalni sindikat radnika u djelatnostima energetike, kemije i nemetala hrvatske	Autonomous Trade Union of Workers in Power Industry, Chemistry and Non-Metal Industry of Croatia
	SDPPTH	Sindikat distribucije plina i plinske tehnike Hrvatske	Croatian Trade Union of Gas Distribution and Gas Technology
	SING	Sindikat naftnog gospodarstva	Oil Economy Trade Union
	SSKH	Sindikat u komunalnim i srodnim djelatnostima Hrvatske	Autonomous Trade Union of Workers in Public Utilities and Related Services of Croatia
HU	VDSZ	Magyar Vegyipari, Energiaipari és Rokon Szakmákban Dolgozók Szakszervezeti Szövetsége	Hungarian Trade Union Federation of Workers in the Chemical, Energy and Allied Industries
IE	Connect	Connect Trade Union	Connect Trade Union
	SIPTU	Services Industrial Professional Technical Union	Services Industrial Professional Technical Union
	Unite	Unite the Union	Unite the Union
IT	Femca-Cisl	Federazione Energia Moda, Chimica e Affini	Energy, Chemicals and Allied Industries Federation
	Filctem-Cgil	Federazione italiana lavoratori chimici, tessile, energia, manifatture	Italian Federation of Chemicals, Textile, Energy and Manufacturing Workers

Representativeness of the European social partner organisations: Gas sector

Country	Abbreviation	Full name	English translation
	Uiltec-Uil	Unione Italiana Lavoratori Chimica Energia Manifatturiero	Italian Chemicals, Energy and Manufacturing Union
LT	LPPSF	Lietuvos pramonės profesinių sąjungų federacija	Lithuanian Federation of Industrial Trade Unions
LU	LCGB	Confédération luxembourgeoise des syndicats chrétiens	Luxembourg Confederation of Christian Trade Unions
	OGB-L	Syndicat services et énergie de l'OGB-L	Service and Energy Trade Union OGB-L
LV	LAKRS	Latvijas Sabiedrisko pakalpojumu un transporta darbinieku arodbiedrība	Latvian Trade Union of Public Service and Transport Workers
NL	CNV	Christelijke vakbeweging Nederland	Christian Trade Union Movement Netherlands
	FNV Publiek Belang	Federatie Nederlandse Vakbeweging – Publiek Belang	Federation of Dutch Trade Unions
PL	OZZGNG	Ogólnopolski Związek Zawodowy Górnictwa Naftowego i Gazownictwa	All-Poland Oil and Gas Mining Trade Union
	PPZ Kadra	Porozumienie Związków Zawodowych Kadra	Trade Unions Alliance 'Kadra'
	SPCh NSZZ Solidarność	Sekretariat Przemysłu Chemicznego NSZZ Solidarność	Chemical Industry Workers' Secretariat of NSZZ Solidarity
PT	ASOSI	Associação Sindical dos Trabalhadores do Sector Energético e Telecomunicações	Trade Union Association of Energy and Telecommunications Workers
	Fetese	Federação dos Sindicatos da Indústria e Serviços	Federation of Industry and Services Unions
	Fiequimetal	Federação Intersindical das Indústrias Metalúrgicas, Químicas, Eléctricas, Farmacêutica, Celulose, Papel, Gráfica, Imprensa, Energia e Mina	Federation of Metallurgical, Chemical, Electrical, Pharmaceutical, Pulp, Paper, Printing, Press, Energy and Mining Industries
	<i>Sindel</i>	Sindicato Nacional da Indústria e Energia	National Industry and Energy Union
	<i>Sinergia</i>	Sindicato da Energia	Energy Trade Union
RO	FS Gaz	Federatia Sindicatelor Gaz-Romania	Federation of Gas Trade Unions
	UFS Atlas	Uniunea Federativă Sindicală "ATLAS"	Federative Union of Trade Unions 'Atlas'
SE	Ledarna	Ledarna	Ledarna
	Seko	Service och kommunikationsfacket	Swedish Union for Service and Communications Employees
	Sveriges Ingenjörer	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
	Unionen	Unionen	Unionen
SI	SDE	Sindikat delavcev dejavnosti energetike	Slovenian Energy Workers' Union
SK	POZ	Plynarensky odborovy zväz	Slovak Gas Trade Union

Note: Members of IndustriAll Europe are marked in bold, members of EPSU in italics, and members of both IndustriAll Europe and EPSU in bold italics.

Source: Network of Eurofound Correspondents

Table 35: National employer associations

Country	Organisation	Full name	English
AT	FGW	Fachverband der Gas- und Wärmeversorgungsunternehmen	Association of Gas and Heat Supply Companies
BE	FEPEG	Federatie van Belgische Elektriciteits- en Gasbedrijven	Federation of Belgian Electricity and Gas Companies
	Synergrid	Synergrid	Synergrid
CZ	ČPS	Český plynárenský svaz	Czech Gas Association
DE	BDEW	Bundeswirtschaftsverband der Energie- und Wasserwirtschaft	Federal Association of Energy and Water Industries
	BVEG	Bundesverband Erdgas, Erdöl- und Geoenergie e.V.	Federal Association for Natural Gas, Crude Oil and Geoenergy
	VAEU	Vereinigung der Arbeitgeberverbände energie- und versorgungswirtschaftlicher Unternehmen	Employers' Association of Energy and Utilities Companies
	Zukunft Erdgas	Zukunft Erdgas	Future Natural Gas
DK	DI	DI	Confederation of Danish Industry
EE	Eesti Gaasiliit	Eesti Gaasiliit	Estonian Gas Association
ES	Sedigas	Sociedad Española del Gas	Spanish Gas Association
FI	Energiateollisuus	Energiateollisuus	Finnish Energy Industries
FR	AFG	Association française du gaz	French Gas Association
	UNEmIG	Union Nationale des Employeurs des Industries Gazières	National Union of Gas Industry Employers
IT	Anigas	Associazione Nazionale Industriali Gas	National Association of the Gas Industry
	Assogas	Assogas	Assogas
	Energia Libera	Energia Libera	Free Energy
	IGAS	Imprese Gas	Gas Companies
	Utilitalia	Utilitalia	Utilitalia
LT	NLEA	Nacionalinė Lietuvos energetikos asociacija	National Energy Association of Lithuania
NL	EN	Energie Nederland	Energy Netherlands
	WENB	Werkgeversvereniging Energiebedrijven en Nutsbedrijven	Employer Organisations for Energy and Utilities Enterprises
RO	ACUE	Federatia Asociatiilor Companiilor de Utilitati din Energie	Federation of Associations of Energy Utility Companies
	FPGC	Federația Patronală Petrol și Gaze	Oil and Gas Employers' Organisation
SE	EFA	Energiföretagens Arbetsgivareförening	The Swedish Energy Employers' Association
	Sobona	Sobona	Sobona
SI	EZS	Energetska Zbornica Slovenije	Energy Industry Chamber of Slovenia
SK	SPNZ	Slovenský plynárenský a naftový zväz	Slovak Gas and Oil Association

Note: Members of Eurogas are marked in bold.

Source: Network of Eurofound Correspondents

Annex 2: The gas sector in the United Kingdom

This study identified four gas sector trade unions in the UK, all being affiliated to EPSU, and two of them with a double affiliation to both IndustriAll Europe and EPSU. All four of these trade unions, listed in Table 36, are involved in sector-related collective bargaining.

Table 36: UK national trade unions

Organisation	Collective bargaining	Consultation	Membership strength ranking
GMB	Yes	Ad hoc	1
<i>Prospect</i>	Yes	Ad hoc	2
<i>Unison</i>	Yes	Ad hoc	3
Unite	Yes	Ad hoc	4

Note: Members of EPSU are marked in italics, and members of both IndustriAll Europe and EPSU in bold italics.

Source: Network of Eurofound Correspondents

Two gas sector employer organisations were found in the UK. They are not involved in collective bargaining but are both affiliated to Eurogas. There are also five UK companies directly affiliated to Eurogas, of which one is reported to be involved in collective bargaining.

Table 37: National employer organisations

Organisation	Type	EU affiliation	Collective bargaining	Consultation	Membership strength ranking
Energy Networks Association	Business association	Eurogas	No	Regular	1
Energy UK	Business association	Eurogas	No	Regular	2

Source: Network of Eurofound Correspondents

Table 38: Sector-related companies affiliated to Eurogas

Company	Employees	Sectors	Overlap	Collective bargaining	Social dialogue
AIK Energy	41	Trade	Oil, electricity, liquefied petroleum gas, fuels	No	Ad hoc
Cheniere Marketing Limited	n/a	Trade	None	No	No
ITM Power	180	Manufacture	None	No	No
Sempra Energy	n/a	n/a	n/a	n/a	n/a
Shell Energy	n/a	Manufacture and trade	Energy	Yes	No

Note: n/a, not available.

Source: Network of Eurofound Correspondents

Annex 3: Gas production and consumption figures

Table 39: Gas-producing countries, 2020

Ranking	Country	Production (billion m ³)
1	USA	914
2	Russia	638
3	Iran	250
4	China	194
5	Qatar	171
6	Canada	165
7	Australia	142
8	Saudi Arabia	112
9	Norway	111
10	Algeria	81
11	Malaysia	73
12	Indonesia	63
13	Turkmenistan	59
14	Egypt	58
15	UAE	55
18	UK	39
30	Netherlands	20
31	Ukraine	19

Sources: World Population Review (2022); IEA (2022)

Table 40: Gas consumption, 2020

Largest gas producers in EU27	Production (billion m ³)	Consumption (billion m ³)
Netherlands	20	36.6
Romania	8.7	11.3
Germany	4.5	86.5
Italy	3.9	21.6
Poland	3.9	21.4
Denmark	1.4	n/a
Croatia	0.5	n/a
Hungary	0.5	10.2

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Austria	0.4	8.5
Ireland	0.04	n/a
Bulgaria	0.03	n/a
Spain	0.02	32.4
France	n/a	40.7
Belgium	n/a	17
Czechia	n/a	8.5
Portugal	n/a	6
Greece	n/a	5.7
Finland	n/a	2
Sweden	n/a	1.1

Note: N/A, not available.

Sources: World Population Review (2022); IEA (2022)

Annex 4: Network of Eurofound correspondents

List of national correspondents who have contributed to this study

Country	Correspondent(s)	Organisation
Austria	Bernadette Allinger	Working Life Research Centre (FORBA)
Belgium	Dries Van Herreweghe	HIVA – Research Institute for Work and Society, KU Leuven
Bulgaria	Ekaterina Ribarova	Institute of Social and Trade Union Research (ISTUR)
Croatia	Predrag Bejakovic and Irena Klemencic	Institute of Public Finance (IPF)
Czechia	Soňa Veverková	Research Institute for Labour and Social Affairs
Denmark	Carsten Jorgensen	Employment Relations Research Centre (FAOS), University of Copenhagen
Estonia	Ingel Kadarik	Praxis Centre for Policy Studies
Finland	Amanda Kinnunen	Oxford Research AB
France	Frédéric Turlan	IR Share
Germany	Sandra Vogel	German Economic Institute
	Birgit Kraemer	Institute for Economic and Social Research, Hans Boeckler Foundation
Greece	Penny Georgiadou	Labour Institute of the General Confederation of Greek Workers (INE GSEE)
Hungary	Nóra Krokavay	Kopint-Tárki Institute for Economic Research
Ireland	Colman Higgins	IRN Publishing
Italy	Anna Mori	Department of Social and Political Sciences, University of Milan
Latvia	Krišs Karnītis	EPC Ltd
Lithuania	Inga Blaziene	Lithuanian Social Research Centre
Luxembourg	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
Netherlands	Amber van der Graaf	Panteia BV
Poland	Barbara Surdykowska	Foundation Institute of Public Affairs
Portugal	Reinhard Naumann	Friedrich Ebert Foundation (Lisbon)
Romania	Victoria Stoiciu and Nicoleta Voicu	European Institute of Romania
Slovakia	Miroslava Kordošová	Institute for Labour and Family Research
Slovenia	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
Spain	Oscar Molina	Institute for Labour Studies, Universitat Autònoma de Barcelona
Sweden	Sirin Celik	Oxford Research AB
United Kingdom	Claire Evans	Warwick Business School

Note: As there is no gas sector economic activity in Cyprus and Malta, there were no national contributions from these countries.

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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the gas sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements.

The aim of Eurofound's representativeness studies is to identify the relevant national and European social partner organisations in the field of industrial relations in selected sectors. This study identified IndustriAll and EPSU – representing employees – and Eurogas – representing employers – as the representative European-level social partner organisations in the gas sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

