

Research report

Industrial relations

Representativeness of the social partner organisations for the Gas sector

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PLANNING GAS REP

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Abstract

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. This study assesses the representativeness of EPSU and IndustriAll Europe for the sectoral trade unions, and EUROGAS, for the sectoral employers' organisations.

Country codes

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

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0. 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 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 European sectoral social dialogue committee for the Gas sector, forms the context of this study in which the representativeness of the European social partner organisations EPSU, IndustriAll Europe and EUROGAS is assessed.

0.1 The ESSDC for the gas sector

The gas European Sectoral Social Dialogue Committee (ESSDC) was established in 2007, with a view to provide a forum to discuss the different challenges facing the industry, from the creation of the EU energy market to the climate change and energy transition. The social partner organisations participating in the committee are the IndustriAll European Trade Union (IndustriAll Europe), the European Federation of Public Service Unions (EPSU) and, on the employers' side, the European Union of the Natural Gas Industry (EUROGAS).

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

The activities of the ESSDC have focussed on the transformation of the sector, by demanding more in-depth analysis of the impact of EU energy directives on the gas industry, beyond their general consequences 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 of the main challenges posed by an ageing workforce, among which the update of older workers' competencies 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 on creating a learning organisation.

The two latest documents produced by the gas ESSDC focus on the energy and climate transition. In 2011, the Joint opinion on the Energy Roadmap 2050, intended to contribute proactively to EU policies. The opinion underlined the importance to fully take into consideration "the profound changes in the energy industry and the impact on the companies, employment and working

conditions” and integrate 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 level to anticipate and manage change. They also demanded to be consulted on the work of the European Commission at an early stage, each time there are implications for the gas companies and their employees, in order to consider the social implications of proposals. Part of this should also be a stronger role of impact assessments.

In 2020, 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 renewables gases and providing quality employment (Joint statement on just transition). They stressed the importance of ensuring a just transition to guarantee quality jobs and direct the efforts towards recovery from the COVID-19 crisis to support the energy transition. By recalling the 2015 ILO’s Just Transition Guidelines, the gas industry European Social Partners stress the need of mainstreaming sustainability; developing 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 assessment of the long-term strategies to achieve carbon neutrality by 2050; effective social dialogue, strong collective bargaining and the participation of social partners to contribute to design the long strategies to anticipate changes at all levels. For the gas sector, the European Social Partners declared their commitment to shape the sectoral transition and analyse the challenges and the needs of the 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 gas ESSDC produced 5 jointly agreed texts. Since its renaissance in October 2019, one new joint text was agreed upon in 2020. An overview of these texts and a detailed analyses of the capacity to negotiate of the European social partner organisations in the Gas sector can be found in chapter 3 of this study.

In the first chapter the workforce and companies are presented, as they are the population to be represented in the ESSDC for the gas sector. The second chapter analyses how the national trade unions and employers’ organisations are representing the workers and companies in their country. The representativeness of the European social partners thus depends upon the membership strength of the affiliated national trade unions and employers’ 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 one ESSDC, or for the participation in one of them;
- 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:

- to relate to specific sectors or categories and be organised at European level;
- to consist of organisations that are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and are representative of several Member States;
- to 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 the national and European level. The study includes only organisations whose membership domain is classed as 'sector-related', that is trade unions and employer associations with members in the sector and which 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: sector relatedness, membership and organisational capacity. Each of these criteria will be defined successively here.

As far as the **sector relatedness** is concerned, the demarcation of the gas sector has been established as covering NACE (Rev. 2)¹ code 35.2 (GAS). This includes three subsectors: manufacture of gas, distribution of gaseous fuels through mains and trade of gas. The sector covers the production 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 from gases of various types, including natural gas. It does not include the production of industrial gases. Essential is the distribution and trade through mains (excluding long-distance transport by pipelines), so that a distribution network infrastructure must be in place.

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

Table 1: Demarcation of the gas sector with NACE Rev. 2 - Code 03.11

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; NACE (Rev.2).

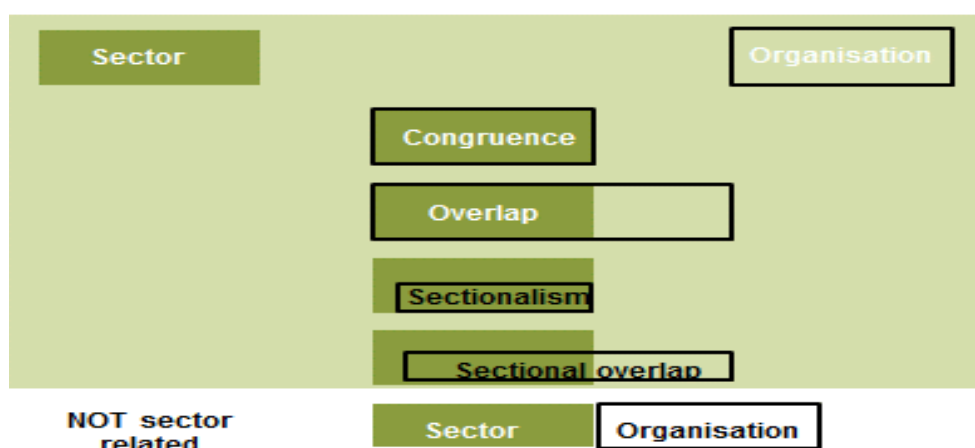
The membership domains of trade unions and employers' organisations can strictly correspond to this demarcation of the sector, which is a type of sector relatedness that we call 'congruence'. If the membership domain of an organisation goes beyond the gas sector as described here, we call that an overlapping representational domain. 'Sectional' is an organisation, which covers a part of the gas sector and nothing else, whereas 'sectional overlapping' is an organisation, which 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

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

Figure 1: : Four different types of sector relatedness



Membership constitutes another important aspect of representativeness. There are several dimensions of membership, which are to be looked at. First the geographical coverage of the EU level organisations (in how many member states does the EU-level trade union/employers' organisation have affiliates?) and secondly the organisational density of the national affiliates. Moreover, it is also important to consider whether the EU-level players organise most of national level players or at least the most significant ones, in terms of density and involvement in sector-related collective bargaining and/or policy-making.

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 this assessment of the capacity to negotiate, it is necessary to analyse the *actors*, 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 to negotiate and come to agreements with other parties, and the *processes* through which the organisations obtains 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 the 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 for 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 the national level, in line with their respective practices and traditions. The possibility to act autonomously for the implementation of EU-wide agreements is an important contribution to the effectiveness of the European Sector Social Dialogue Committee.

Finally, representativeness also depends upon the structures, resources and capacity of the organisations to mobilise active participation of their members, to aggregate different interests of member organisations and their possibility to act autonomously at the European level. **Effective participation in the ESSDC** meetings is assessed in terms of presence in the meetings of the ESSDC in the two-year period before the year of publication of this report. 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 meetings².

0.4 The data collection and the 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 European Trade Union, the European federation of Public Service Unions (EPSU), and the European Union of the Natural Gas Industry (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 in European level organisations.

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

Unless cited otherwise, this study draws on the country studies provided by the Eurofound's Network of European Correspondents. Where precise quantitative data could not be obtained, estimates were provided rather than leaving a question blank. Thus, quantitative data (e.g. 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.

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

Quality assurance

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

Firstly, combining the top-down and the 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 Eurofound's Network of European Correspondents, between May 2020 and August 2020. Subsequently, Eurofound research managers and the author 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 has been made available at the end of January 2022 to the European social partners 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 has been finalised, and as such prepared for the formal evaluation by the Eurofound Industrial Relations Advisory Committee, with the addition of 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, so to ensure that the bottom-up approach included all the relevant sector-related organisations from their country. As different social partner organisations can consider the reported information of other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information of other organisations representing similar membership, this process involves an element of mutual control and recognition.

Finally, this report has been evaluated and approved between mid-April and mid-May 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 has been edited and prepared for publication in the second half of 2022.

0.5 The 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. The report then analyses the relevant social partner organisations in 25 of the 27 EU Member States. The third part considers the representative associations at European level. Cyprus and Malta are excluded in this study because they have no fixed gas distribution system.

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 conclude 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 shall provide the evidence-base for further efforts and decisions of 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 they don't have Gas sector activities.

The three subsectors of production, distribution and trade with gas are rather heterogeneous in terms of their employment structures. The production of gas involves the majority of enterprises (74.7%) however a smaller share of workers (7.4%) and employees (5.0%). The average enterprise size is 3 workers. This is because it 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 that it is possible to speak of a national specificity (which emerged with the latest revision of the national data series in 2018). In the other 24 countries covered by this study, this subsector counts 465 firms and some 1,400 workers overall.

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

The gas sector employment is highly concentrated in a small number of countries. The six larger 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 with 25.344 most persons working in the Gas sector, and the Netherlands with about 8000, the least.

Table 3: The gas sector in the EU, Enterprises, workers, employees (2018)

	Enterprises				Workers				Employees			
	35.2	35.21	35.22	35.23	35.2	35.21	35.22	35.23	35.2	35.21	35.22	35.23
EU27*	5.203	3663	563	667	119,660	11.298	34.553	21.681	89.390	7.315	34.393	21.468
EU 27 minus DE	1536	246	443	537	94.316	974	28175	13039	68058	883	28078	12883
						1%	30%	23%				
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	:	:	:	2321	:	:	:	2,263	:	:	:
DK	100	74	17	9	941	:	515	:	936	:	514	:
DE	3,667	3,417	120	130	25,344	10,324	6,378	8,642	21,332	6,432	6,315	8,585
EE	27	4	7	16	246	:	:	:	237	:	:	:
FI	21	17	2	2	72	38	:	:	69	35	:	:
HU	51	9	4	38	3,074	17	1,189	1,868	3,050	14	1,182	1,854
IE	:	:	:	:	1500**	:	:	:	1400**	:	:	:
EL	10	:	:	0	385	:	:	0	382	:	:	0
ES	63	7	39	17	4538	101	2,366	2,071	4,516	98	2,355	2,064
FR**	158	101	19	38	16,133	13	9,637	6,483	16,132	12	9,637	6,483

	Enterprises				Workers				Employees			
HR	67	0	50	17	1,925	0	1,747	178	1910	0	1,735	175
IT	500	42	174	284	18,914	263	12,589	6,062	18,720	227	12,551	5,942
LV	10	2	3	5	1,070	5	908	157	1,058	5	896	157
LT	12	4	1	7	80	:	:	58	80	:	:	58
LU	6	4	1	1	100**	:	:	:	100**	:	:	:
MT												
NL	17	:	:	:	8000**	:	:	:	:	:	:	:
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
SI	7	1	6	0	141	:	:	0	139	:	:	0
SE	50	40	8	2	354	203	:	:	306	171	:	:
SK	13	:	:	5	2,097	:	:	741	2093	:	:	740

Source: Eurostat (2020), Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E)

Notes: : indicates data unavailable, often for confidentiality (small numbers); * Since Cyprus and Malta do not have a domestic gas network industry, EU27 corresponds to the 25 countries covered by this study.

** 2015. **estimates provided by national experts

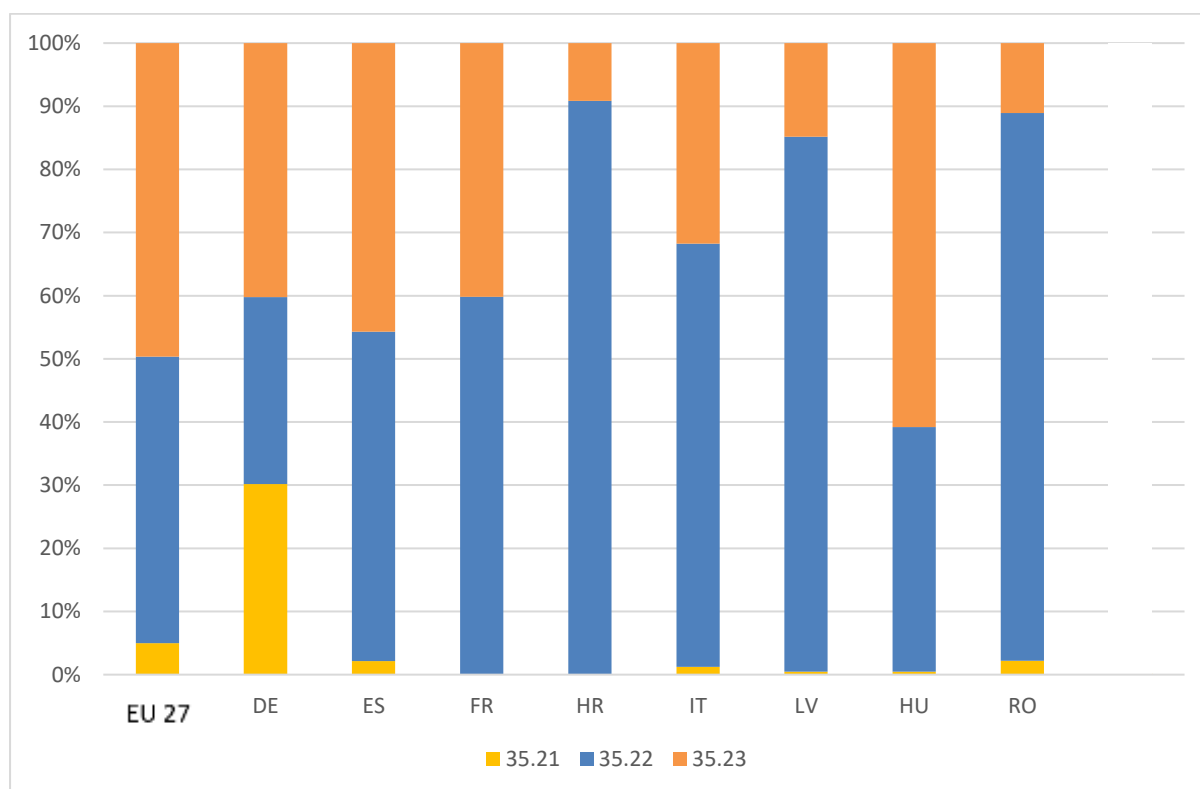
*With EU 27 is meant in fact EU27 minus Cyprus and Malta.

Besides the 6 EU member States with more than 8000 employees in the sector, there is a second group of where the sectoral workforce is between 2000 and 4500. This includes Czechia, Hungary, Spain, Croatia and Slovakia. A third group of Member States is formed by: Austria, Bulgaria, Denmark, Ireland, Latvia, and Portugal, where the sectoral workforce varies between 1500 and 700. Finally, a fourth group of Member States has a gas sectoral workforce below 500, in Belgium, Estonia, Finland, Greece, Lithuania, Luxemburg, Slovenia and Sweden. This rather small numbers of workers in the sector, in some of these countries, has several consequences for this study. Firstly, it needs to be taken into consideration when assessing the industrial relations landscape of the sector and the representativeness of the actors. Secondly the fact that numbers are small, somehow extrapolates the differences more, 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 is considered as confidential and therefore it is not available for the subsectors. Complete data on the number of employees by subsectors are available for eight countries (DE, ES, FR, HR, IT, LV, HU, RO). Germany is the exception, with 30% employment in both manufacturing and distribution and the remainder 60% in trade. 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 larger share of workforce, which is above 50% in ES, FR, HR, IT, LV and RO. The only exception is Hungary, where trade amounts to 60% of the overall sectoral workforce (Figure 2).

Only in Germany, there is 30% of workforce in production, in other EU MS this is less than 5%. The breakdown of the EU workforce between distribution and trade is all over the EU 27 – about 50/50% - In Croatia, Latvia and Romania, there is about 85-90% of the sectoral workforce in Distribution, while for Germany and Hungary the balance is in favour of 60% of the workforce in trade and about 40% in distribution.

Figure 2: Employment in the gas subsectors in selected countries (2018)



Source: Eurostat (2020), *Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E)*

As part of the EU energy policy, the gas sector, together with the electricity sector, underwent liberalisation, which took place in three phases since the late 1990s and until the early 2010s. Liberalisation involved the separation of the operation of 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 sector at global level, these sectors are considered as one of the world's higher wage payers (Graham 2010). The sector has nevertheless been suffering serious shortages of skilled labour and challenges for working conditions remain. Working conditions in the industries are also generally above average, although there are areas that would benefit from improvement, including unsocial 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 be a point of attention for the social partners, also within the EU.

Table 4: Natural gas market indicators (2018)

	Entities bringing gas into the country [No.]	Main Entities bringing gas in the country, Deal >5% Total [No.]	Cumulative Market Share, Main Entities [%]	Market Share - Largest Production & Import Company [%]	Retailers to Final Consumers [No.]	Main Retailers, Sales >5% Total [No.]	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
DK					14	4	93	
DE	25				990	4	27	
FI	1	1	100	100	24	1	90	90
IE	10	7	100	23	9	6	97	44
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
FR	35	3	80	55	74	5	67	37
HR	7	3	94	46	44	3	58	36
IT	64	3	83	54	412	4	44	19
LT	12	2	91	45	11	2	87	82
LV	6	3	98	61	5	2	89	82
LU	5	2	98	78	9	4	98	39
HU	48	5	76	34	27	3	67	55
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

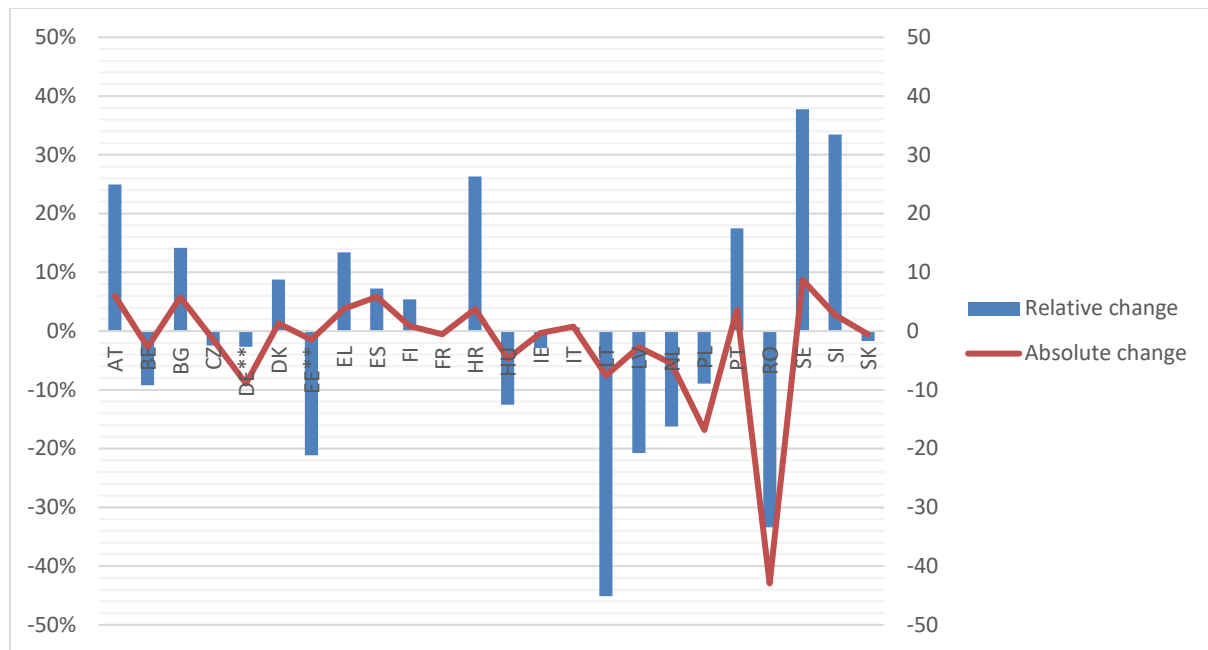
Source: DG Energy, *Biannual energy statistical country datasheet* (25/02/2021), https://ec.europa.eu/energy/sites/default/files/energy_statistical_countrydatasheets.xlsx

* 2016

All over the EU 27 there is a decline in the numbers of persons employed in the gas sector between 2008 and 2018. Below the trends in employment from 2008- to 2018 are presented for each of the 27 Member States. It can be seen that in absolute numbers, marked in blue in the figure below, the decline in the sectoral workforce is the largest in Romania and Poland. There are a few countries

where the blue bar is above the zero line, indicating an increase in sectoral employment between 2008 and 2018. The Red dots indicate the proportion of the increases or decreases

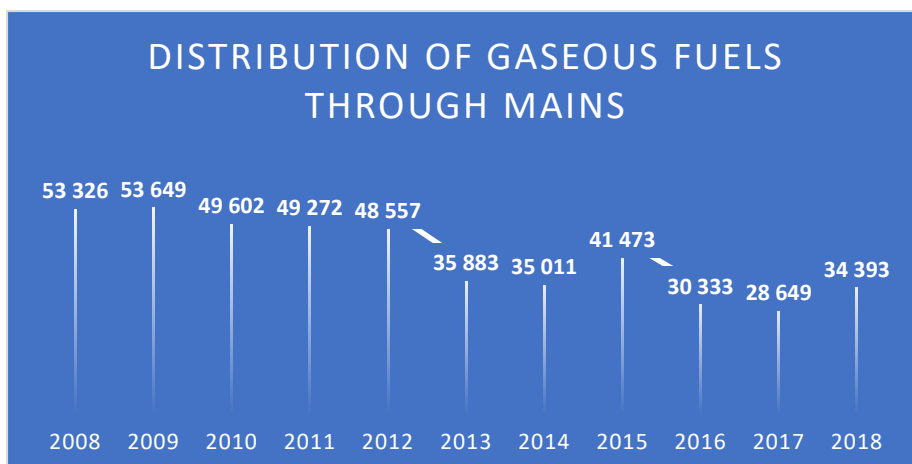
Figure 3: Employment in the gas subsectors in selected countries (2008-2018)



While the general trend indicates a slightly declining workforce in the gas sector between 2008 and 2018 at EU 27 level, the figure above shows a variety of trends, combining decline in some countries, but also an increase in the sectoral workforce in some other Member States. Examples where the sectoral workforce increased, are Austria, Bulgaria, Greece, Spain, Croatia, Portugal, Sweden and Slovenia.

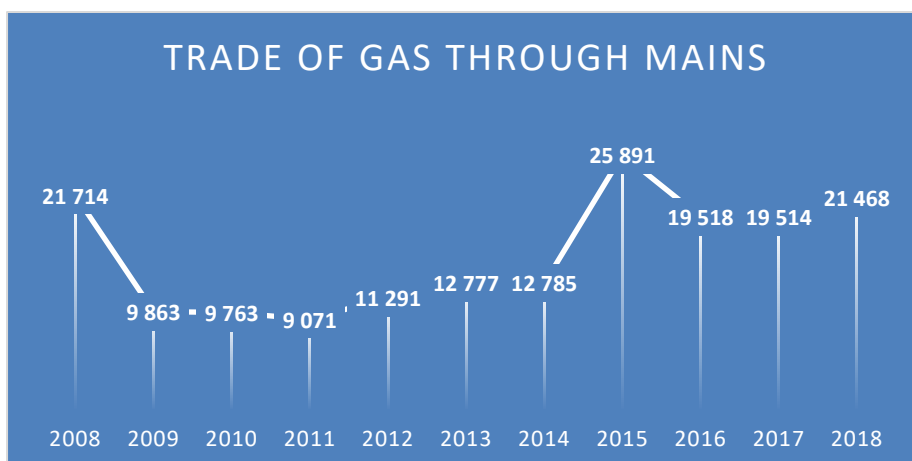
The gas sectoral workforce is mostly found (51-55%) in the distribution activities and in (32-35%) in the trade of gas. Only 10-15% is to be found in production and this is mainly found in Germany, where about 91% of the employees in production are employed. Therefore, the overall trend in persons employed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

Figure 4: evolution of the workforce in the distribution of gas (2008-2018, based on the country for which data is available)



Source: Eurostat

Figure 5: evolution of the workforce in the trade of gas (2008-2018, based on the country for which data is available)



Source: Eurostat

In terms of employment and labour relations, the subsectors of distribution and trade are particularly important, because of the 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 shape an industrial relation landscape with relatively strong trade union representation and well-developed collective bargaining.

In terms of sectoral context, the impact of some mega trends on the Gas sector have been explored based on a brief web-search. In terms of the impact of **Greening** of the economy, the role and potential of the gas sector is to be considered in bridging temporary gaps of production of renewables, at times where there is not much wind or sun. An article in the “Renewable Energy Law and Policy Review” considers different scenarios where the fossil energy is replaced by other gases (Tichelr & Zauner 2018).

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 processes of energy transition, EUROGAS is keen to ensure reskilling and upskilling opportunities for the affected. The energy transition also has had some impact on the representativeness of EUROGAS. In the beginning of concerted efforts towards the energy transition has seen a diversification of Eurogas members. In recent years EUROGAS has welcomed electrolysers manufacturer ITM power (<https://itm-power.com/>) on its board, and has also signed digital players to our membership. At the same time traditional energy companies and Gas Distribution System Operators (DSOs) remain very active in efforts to decarbonise and are working to help set an enabling policy framework.

In terms of **digitalisation**, this provides different opportunities for both the distribution activities as for the trade of gas. With digitalisation, and better analyses of the available data, improvements in the settling of supply in line with the demand of gas, is key for both distribution as for trade activities in the sector. For the gas sector this is crucial because competitiveness is based now on better margins rather than bigger productions. Digitalisation gives an opportunity to collect, analyse and utilize the data for substantial improvement. Digital technologies are recognized as adding value to gas companies by helping reduce costs, make faster and better decisions and increase workforce productivity (see Deloitte, 2017). There are also risks that jobs in for example gas meter reading activities are lost due to digitalisation. Opportunities and new jobs may arise for example within new technologies developed, like for example within the company Kayrros, which has developed systems to manage value chain methane emissions, using satellite data.

Regarding the impact of the **covid** crisis on the gas sector, **first gas and oil prices** had declined 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 Saudi Arabia and Russia contributed to an additional 18% decline in oil prices between March and May 2020. (Schneider & Schwartz 2020) Nevertheless, in the second half of 2021, gas demand is up, due to the uptake of economic activity in other sectors. Geopolitical events outside of the EU (in for example [Moldova](#), and in Northern Africa affecting the gas sector in [Spain](#)), has also impacted gas sector activities of a number of EU member states, and increased gas prices affected the sector in the second half of 2021. Due to the impact on citizens, governments have recently considered measures regarding trade and distribution of gas, in some Member States.

2. National level of interest representation

In the 25 countries covered by this representativeness study (CY and MT were not included as they do not have a fixed network gas distribution), the Network of Eurofound Correspondents identified 69 sector-related trade unions in 24 EU member states, and 28 sector-related employer and business associations in 16 EU member states (Table 5).

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

Number of sector-related organisations	Member States with respective number of trade unions in the gas sector overall	Member States with respective number of employer associations in the gas sector overall
Countries without fixed network gas distribution Not included in this study	CY, MT	
0	EE	BG, EL, HR, HU, IE, LU, LV, PL, 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, HR, IE, IT, PL	
4	BE, ES, FI, HR, SE	DE
5	PT	IT
6	EL	
7	FR	

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

As shown in Table 5, only in Estonia there is 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 between one and three trade union organisations in the gas sector, while eight countries have a more plural representational landscape. This latter group of Member States comprises countries where representation cleavages depend on ideological (France, Greece, Portugal) or territorial 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 several EU countries, gas enterprises are not organised. This involves nine Member States: Bulgaria, Greece, Croatia, Hungary, Ireland, Luxembourg, Latvia, 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, as we shall see, it is rather decentralised. In the other countries, we usually have between one or two enterprises (15 countries), whereas only in Germany and Italy we have four and five associations respectively. In these latter countries, the employer segmentation reflects the organisation of the sector around firms which historically were part of different group of providers (public, private, 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 (production, distribution and trade) to a varying extent (Table 7). Of the 68 organisations for which we could collect the relevant information, nearly half or 32 cover the whole sector, while 36 represent members in one or two subsectors.

Manufacture of gas is the least covered in the trade union membership, but this also depends on the marginal character of gas manufacture in the Member States. Mostly biogas production was reported in a number of countries, but this is rarely connected to supply and therefore would mostly be substantially outside the scope of this study. In 2018, employed persons 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 35 trade union organisations, while distribution and trade are covered by 65 and 55 trade unions respectively.

Furthermore, trade unions in the gas sector cover public and private company workers to a varying extent. The coverage of public sector workers is smaller compared to the private sector. Nearly all or 59 unions cover private gas company workers in 23 Member States. In contrast, 34 or about a half of trade unions cover public gas company workers, in 18 Member States. At the same time, due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the presence of social partners organisations in the public and private sectors and the ranking of organisations.

The extent of the multisectoralism of trade union membership from the gas and electricity sectors can be summarized as follows.

Table 6: Multisectoralism of gas sector trade unions also organising electricity sector workers, 2020

Member States where all the Gas sector trade unions are also organising electricity sector employees	16 MS	AT, BE, CZ, DE, DK, ES, FI, FR, HU, IE, LT, LU, NL, PT, SE, SI
Member States where some of the gas sector trade unions are also organising electricity sector employees, though not all of them	3 MS	IT, PL, RO
Member states where Gas sector trade unions are not organising electricity sector employees	5 MS	BG, EL, HR, LV, SK

Source: Eurofound representativeness study for the Electricity Sector.

In fact, 52 of the 69 Gas sector trade unions (75%) are also organising employees in the electricity sector in 19 MS. For 16 MS, all the gas sector trade unions are also organising electricity sector employees. This is the case in Austria, Belgium, Czechia, Germany, Denmark, Spain, Finland, France, Hungary, Ireland, Lithuania, Luxemburg, Netherlands Portugal, Sweden and Slovenia. In three other Member States there are some of the Gas sector trade unions also organising electricity sector employees, though not all of them. This is the case for Italy, Poland and Romania. Where the remaining 5 Members states are those where Gas sector trade unions are only organising gas sector employees without any involvement in the electricity sector, this is the case for Bulgaria, Greece, Croatia, Latvia and Slovakia.

Table 7: Sector coverage of the gas sector trade unions, 2020

MS	Organisation	35.1	35.2	35.3	Public	Private	Domain*	Also organising electricity sector
EU 27	69 trade unions	31	62	51	34	59		
	In 24 of the 25 EU MS	13MS	23MS	23MS	18MS	23MS		
AT	GPA-djp	Yes	Yes	Yes	No	Yes	SO	
AT	PRO-GE	Yes	Yes	Yes	No	Yes	SO	
AT	younion	Yes	Yes	Yes	Yes	Yes	O	
BE	ACV-CSC BIE	Yes	Yes	Yes	-	Yes	O	
BE	ACLVB-CGSLB	Yes	Yes	Yes	-	Yes	O	
BE	ACV-CSC CNE	Yes	Yes	Yes	-	Yes	SO	
BE	GAZELCO	Yes	Yes	Yes	No	Yes	O	
BG	НФТ "Химия и индустрия"	No	Yes	No	Yes	No	O	
BG	НФХ КТ Подкрепа	No	Yes	Yes	Yes	No	O	
CZ	OS UNIOS	No	Yes	Yes	Yes	Yes	O	
CZ	SOSE	No	Yes	Yes	Yes	Yes	O	
DE	IGBCE	Yes	Yes	No	No	Yes	SO	
DE	ver.di	No	No	Yes	Yes	Yes	SO	
DK	Metal	N/A	N/A	N/A	Yes	Yes	SO	
DK	3F	Yes	Yes	No	Yes	Yes	SO	
DK	IDA	Yes	Yes	Yes	Yes	Yes	SO	
EL	ΠΟΕ (ΠΟΕ)	No	Yes	Yes			O	
EL	ΣΕΔΕΣΦΑ (SEDESFA)	No	Yes	No			S	
EL	EDA Attikis	No	Yes	No	Yes	No	S	
EL	EDA Thessalonikis Thessalias	No	Yes	No	No	Yes	S	
EL	ΣΕΔΕΠΑ (SEDEPA)	No	No	Yes	Yes	No	S	
EL	Zenith	No	Yes	No	No	Yes	S	
ES	UGT-FICA	Yes	Yes	Yes	No	Yes	O	
ES	CCOO Industria	Yes	Yes	Yes	No	Yes	O	
ES	FI-USO	Yes	Yes	Yes	No	Yes	O	
ES	ELA	Yes	Yes	Yes	No	Yes	SO	
FI	JHL	No	Yes	No	No	Yes	SO	
FI	ТЕК	No	Yes	Yes	Yes	Yes	SO	
FI	Pro	N/A	N/A	N/A	-	-	SO	

MS	Organisation	35.1	35.2	35.3	Public	Private	Domain*	Also organising electricity sector
FI	YTN	No	Yes		No	Yes	SO	
FR	CFE-CGC Energies	Yes	Yes	Yes	No	Yes	SO	
FR	CFTC-CMTE	Yes	Yes	Yes	-	Yes	SO	
FR	FCE-CFDT	No	Yes	Yes	-	Yes	SO	
FR	FNEM-FO	Yes	Yes	Yes	No	Yes	SO	
FR	FNME-CGT	Yes	Yes	Yes	No	Yes	SO	
FR	UNSA Energie	Yes	Yes	Yes	No	Yes	SO	
FR	SUD Energies	No	Yes	Yes	No	Yes	SO	
HR	SING	No	Yes	Yes	Yes	Yes	SO	
HR	EKN							
HR	SSKH	No	Yes	Yes	Yes	Yes	SO	
HR	SDPPTH	No	Yes	No	Yes	Yes	S	
HU	VDSZ	No	Yes	Yes	Yes	Yes	SO	
IE	SIPTU	No	Yes	Yes	Yes	Yes	O	
IE	Connect	No	Yes	No	Yes	No	SO	
IE	Unite	No	Yes	No	Yes	No	SO	
IT	Filctem-Cgil	No	Yes	Yes	Yes	Yes	SO	
IT	Femca-Cisl	Yes	Yes	Yes	Yes	Yes	O	
IT	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	
LU	LCGB	Yes	Yes	Yes	Yes	Yes	O	
LV	LAKRS	No	Yes	Yes	No	Yes	SO	
NL	FNV	No	Yes	Yes	No	Yes	O	
NL	CNV	No	Yes	Yes	No	Yes	O	
PL	SPCh NSZZ Solidarność	Yes	Yes	Yes	Yes	Yes	O	
PL	OZZGNG	Yes	Yes	Yes	Yes	Yes	C	
PL	PPZ Kadra	Yes	Yes	Yes	Yes	Yes	SO	
PT	FIEQUIMETAL	No	Yes	Yes	No	Yes	SO	
PT	SINDEL	No	Yes	Yes	No	Yes	SO	
PT	FETESE	No	Yes	Yes	No	Yes	SO	
PT	SINERGIA	No	Yes	Yes	No	Yes	SO	
PT	ASOSI	No	Yes	Yes	No	Yes	SO	
RO	FS Gaz	Yes	Yes	Yes	Yes	Yes	SO	

MS	Organisation	35.1	35.2	35.3	Public	Private	Domain*	Also organising electricity sector
RO	UFS Atlas	Yes	Yes	Yes	Yes	Yes	SO	
SE	Sveriges Ingenjörer	N/A	N/A	N/A	-	-	SO	
SE	Unionen	Yes	Yes	No	No	Yes	SO	
SE	Seko	N/A	N/A	N/A	Yes	Yes	SO	
SE	Ledarna	N/A	N/A	N/A	Yes	Yes	SO	
SI	SDE	Yes	Yes	Yes	Yes	Yes	SO	
SK	POZ	Yes	Yes	Yes	Yes	Yes	C	

*C= Congruence, O= Overlap, S= Sectionalism, SO= Sectional overlap.

Note: Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the presence of social partners organisations in the public and private sectors and the ranking of organisations.

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

Colour code: the organisations marked in dark blue in the column on the right in the table, indicate those trade unions that also organise workers in the electricity sector.

Table 8 shows the organisational density of the trade unions covered by this study per Member State. 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, we have collected the membership data for the majority or 43 sector-related trade unions out of total 69 (62%). With this word of caution, available data suggests a trade union membership in the gas sector of more than 66 thousand workers, i.e. 43% of the sectoral employment of the whole EU-27. If we calculate the density rate for the 22 countries for which we have the membership data, density is around 50% (over a total of 136,061 workforce, according to data provided by NCs).

Due to the partial coverage of membership data and the substantial lack of information about France and Germany, which have among the larger sectoral workforces in the EU, it is difficult to assess the overall level and the differences across countries and organisations. However, the unionisation in the gas sector appears to be significant.

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

	Employees NCs	Employees Eurostat	TU members	TU with data	TU total	Union Density NCs	Union Density, Eurostat
AT	1326	1,659	1,050	3	3	79%	63%
BE	1000	211	320	1	4	32%	No reliable data available
BG	900	900	966	2	2	Around 100%	Around 100%
CY							
CZ	5900	2,263	3,005	2	2	51%	No reliable data available
DE	N/A	N/A		0	2	N/A	N/A
DK	1015	936	352	2	3	35%	38%
EE	232	237	0	No TU	No TU	No TU	No TU
EL	3,183	382	1,869	6	6	59%	No reliable data available
ES	4516	4,516	2,710	1	4	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	1,173	3	3	63%	61%
HU	3315	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/A	N/A		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%
MT							
NL	N/A	N/A		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/A	N/A		0	2	N/A	N/A
SE	306	306	349	3	4	N/A	Around 100%
SI	113	139	80	1	1	71%	58%
SK	2,083	2,093	1,525	1	1	73%	73%
EU 27	96.861	75.769	50.387	41	69	52%	66%

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

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 policy-making is analysed in the table below. This presents 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 member organisations of the employer organisations which are party to an agreement), the share and the number of workers covered by such agreements. It should be noted that this table is based on estimates which have either been provided by members of the Eurofound Network of national experts or have 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 thirteen countries (BG, CZ, EL, HR, HU, IE, LT, LU, LV, PL, PT, RO, SK,) only single employer bargaining is present. This is the majority of the 25 countries where collective bargaining takes place. The relevance of single employer bargaining is not only the result of the prevalence of decentralised bargaining in the national industrial systems, as in Ireland and in some Central and Eastern European Member States, but also of 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 equal or over 80%: Czech Republic (80%), Hungary (100%), Lithuania (80%), Luxembourg (95%), Latvia (90%), Poland (90%), Romania (90%), Slovakia (97%). Such coverage rates locate the gas sector well-above the national coverage rates. In the eleven countries where multi-employer bargaining is present, 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	Organisation	EU affiliation	MECB	SECB	Consultation
AT	100%	Yes	GPA-djp	IndustriALL Europe	Yes	No	Ad-hoc
			PRO-GE	IndustriALL Europe	Yes	No	Regularly
			<i>younion</i>	EPSU	Yes	No	Regularly
BE	100%	Yes	ACV-CSC BIE	IndustriALL Europe	Yes	Yes	Regularly
			ACLVB-CGSLB	IndustriALL Europe	Yes	Yes	Regularly
			ACV-CSC CNE	IndustriALL Europe	Yes	Yes	Regularly
			<i>GAZELCO</i>	EPSU	Yes	Yes	Regularly
BG	60%	No	НФТ "Химия и индустрия"	IndustriALL Europe	No	Yes	Ad-hoc
			НФХ КТ Подкрепа	EPSU, IndustriALL Europe	No	Yes	Ad-hoc
CZ	80%	No	<i>OS UNIOS</i>	EPSU	No	Yes	No
			<i>SOSE</i>	EPSU	No	Yes	No
DE	83%	Yes	IGBCE	IndustriALL Europe	Yes	Yes	Ad-hoc
			<i>ver.di</i>	EPSU	Yes	Yes	Ad-hoc
DK	85%	Yes	Metal	IndustriALL Europe	Yes	No	Regularly
			3F	IndustriAll Europe	Yes	No	Ad-hoc
			IDA	IndustriAll Europe	No	No	Ad-hoc

Country	SRCB	MECB	Organisation	EU affiliation	MECB	SECB	Consultation
EE	0%	No	No trade unions				
EL	50%	No	ΠΟΕ (ΠΟΕ)	IndustriAll Europe	No	No	Ad-hoc
			ΣΕΔΕΣΦΑ (SEDESFA)	None	No	Yes	Ad-hoc
			EDA Attikis	None	No	Yes	Ad-hoc
			EDA Thessalonikis Thessalias	None	No	Yes	Ad-hoc
			ΣΕΔΕΠΑ (SEDEPA)	None	No	Yes	No
			Zenith	None	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	EPSU, IndustriAll Europe	No	Yes	No
FI	95%	Yes	JHL	EPSU	Yes	No	Ad-hoc
			TEK	IndustriAll Europe	Yes	No	Regularly
			Pro	IndustriAll Europe	Yes	N/A	N/A
			YTN	N/A	Yes		N/A
FR	100%	Yes	CFE-CGC Energies	EPSU, IndustriAll Europe	Yes	Yes	Ad-hoc
			CFTC-CMTE	None	No	Yes	No
			FCE-CFDT	IndustriAll Europe	Yes	Yes	Ad-hoc
			FNEM-FO	EPSU, IndustriAll Europe	Yes	Yes	Ad-hoc
			FNME-CGT	EPSU, IndustriAll Europe	Yes	Yes	Ad-hoc
			UNSA Energie	None	No	Yes	No
			SUD Energies	None	No	Yes	No
HR	40%	No	EKN	IndustriAll Europe			
			SING	IndustriAll Europe	No	Yes	Regularly
			SSKH	EPSU	No	Yes	Regularly
			SDPPTH	None	No	Yes	No
HU	100%	No	VDSZ	IndustriAll Europe	No	Yes	No
IE	50%	Yes	SIPTU	EPSU, IndustriAll Europe	No	Yes	Rarely
			Connect	IndustriAll Europe	No	Yes	Rarely
			Unite	EPSU, IndustriAll Europe	No	Yes	Rarely
IT	100%	Yes	Filctem-Cgil	EPSU, IndustriAll Europe	Yes	Yes	Ad-hoc
			Femca-Cisl	EPSU, IndustriAll Europe	Yes	Yes	Ad-hoc
			Uiltec-Uil	IndustriAll Europe	Yes	Yes	Ad-hoc
LT	80%	No	LPPSF	EPSU, IndustriAll Europe	No	Yes	Ad-hoc
LU	90%	No	OGB-L	IndustriAll Europe	No	Yes	No
			LCGB	IndustriAll Europe	No	Yes	No
LV	90%	No	LAKRS	None	No	Yes	Regularly

Country	SRCB	MECB	Organisation	EU affiliation	MECB	SECB	Consultation
NL	90%	Yes	FNV Publiek Belang	EPSU, IndustriAll Europe	Yes	Yes	Ad-hoc
			CNV	None	Yes	Yes	Ad-hoc
PL	90%	No	SPCh NSZZ Solidarność	IndustriAll Europe	No	Yes	Regularly
			OZZGNG		No	Yes	Regularly
			PPZ Kadra	IndustriAll Europe	No	Yes	Regularly
PT	43%	No	FIEQUIMETAL	IndustriAll Europe	No	Yes	N/A
			<i>SINDEL</i>	EPSU	No	Yes	No
			FETESE	None	No	Yes	N/A
			SINERGIA	None	No	Yes	No
			ASOSI	None	No	Yes	N/A
RO	90%	No	FS Gaz	EPSU, IndustriAll Europe	No	Yes	Regularly
			UFS Atlas	IndustriAll Europe	No	Yes	Regularly
SE	90%	Yes	Sveriges Ingenjörer	IndustriAll Europe	Yes	No	N/A
			Unionen	IndustriAll Europe	Yes	No	No
			<i>Seko</i>	EPSU	Yes	No	Ad-hoc
			Ledarna	None	Yes	No	No
SI	90%	Yes	<i>SDE</i>	EPSU	Yes	No	Regularly
SK	97%	No	<i>POZ</i>	EPSU	No	Yes	No

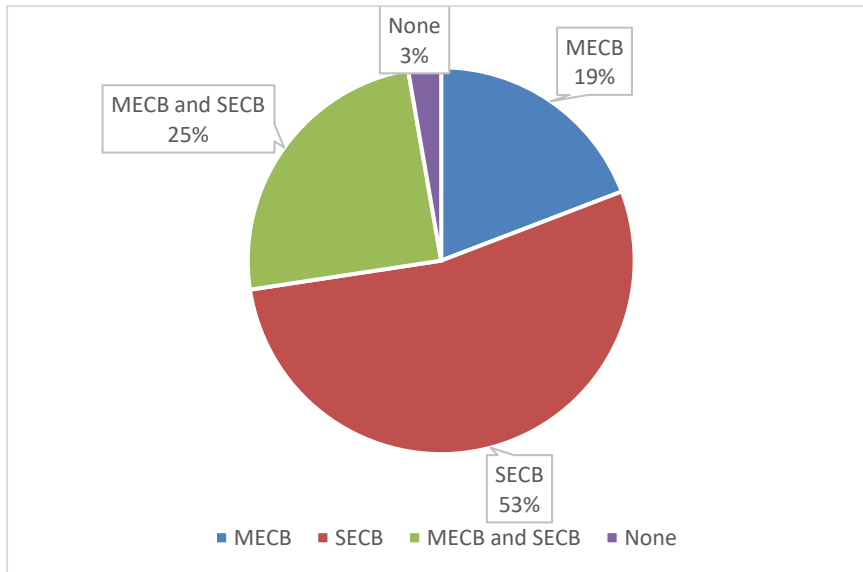
* Members of EPSU are marked in Italic and members of IndustriAll Europe are marked in bold; SRCB: Sector related collective bargaining, covering both multi-employer collective bargaining (MECB) and single-employer collective bargaining (SECB).

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

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 (the Danish Society of Engineers) and the Greek POE (Panhellenic Energy Federation). They have both members in the sector, but they are not signatories of the sector-related collective agreements. POE is a federation of unions and it does not sign directly the agreements, because its affiliates are the bargaining parties.

More than half of all sector-related unions (39 or 53%) are involved in single-employer bargaining only. This is linked to the abovementioned prevalence of decentralised bargaining systems. Fourteen unions engage in multi-employer bargaining alone (19%), while 18 unions participate in both multi-employer and single-employer bargaining.

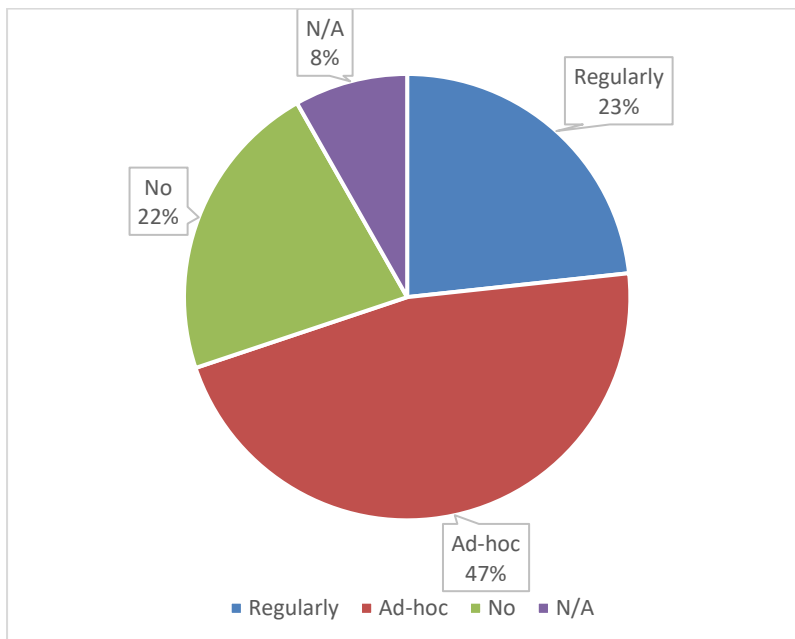
Figure 6: Involvement of trade unions in different forms of collective bargaining in the gas sector, 2020 (%) (N= 69)



Source: Network of Eurofound Correspondents' national contributions to this study (2020), n=69. SRCB: Sector related collective bargaining, covering both multi-employer collective bargaining (MECB) and single-employer collective bargaining (SECB).

Consultation between government and trade unions about sector-related issues involves 70% of the trade union organisations covered by this study (Figure 7). Consultation takes place regularly with 25% of the unions and on *ad hoc* basis with 51% 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 (%)



Source: Network of Eurofound Correspondents' national contributions to this study (2020), n=69.

2.3 Sector relatedness and membership strength of employers' organisations

28 employer and business associations are present in two thirds of the countries covered by this study (16 out of 25 Member States, as Cyprus and Malta are not included). They tend to represent enterprises in different segments of the energy sector, like 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 Danish Industry (DI), which represents the whole manufacturing sector, transport and construction.

All employer and business associations cover the whole territory in 16 Member States where they operate, and almost all (except one) all types of companies working in the sector. Similarly, to the trade unions, they cover public and private sector companies to a varying extent. The coverage of public sector companies is smaller compared to the private sector. 15 employer organisations cover private gas companies in 10 Member States. In contrast, six employer organisations cover public gas companies, in five Member States. At the same time, due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the presence of social partners organisations in the public and private sectors and the ranking of organisations.

There is also a significant multisectoralism at the employers' side, with organisations organising both the gas and electricity sector employers. The majority or 22 out of 28 employer organisations are reported to have overlap in their membership, ie covering companies outside the gas sector, in 14 Member States. Most frequently, this refers to electricity, energy production, heating, and oil production. This can be summarised as indicated in the table below.

Table 10: Member States where gas sector employers organisations also organise electricity sector employers

	Number of MS	Member states in this situation
Member States where all the Gas sector employers organisations are also organising electricity sector employers	6 MS	BE, DK, FI, LT, NL, SI
Member States where some of the gas sector employers organisations are also organising electricity sector employers, though not all of them	5 MS	DE, FR, IT, RO, SE
Member states where Gas sector employers organisations are not organising electricity sector employers	5 MS	AT, CZ, EE, ES, SK

Source: table 11.

13 of the 28 Gas sector employers' organisations (50%) are also organising employers in the electricity sector in 11 MS. They are marked blue in the table 10 above and in table 11 below. For 6 MS, all the gas sector employers' organisations are also organising electricity sector employers. This is the case in Belgium, Denmark, Finland, Lithuania, Netherlands and Slovenia. In five other Member States there are some of the Gas sector employers' organisations, that also organising electricity sector employers, though not all of them. This is the case for Germany, France, Italy, Romania and Sweden. Where the remaining 5 Members states are those where none of the gas sector employers' organisations are having any involvement in organising the employers in the electricity sector, this is the case for Austria,

Czechia, Estonia, Spain and Slovakia. Table 6 also listed the nine member states for which there is no gas sector employers' organisation, and the 2 member states where there is no gas sector activity.

The overlap of the 75% of the gas sector trade unions that also organise electricity sector employees (in 19 MS) is stronger than the overlap at the employer side. Though with 50% of the sectoral employers' organisations in 11 Member States of the 16 Member states with sectoral employers' organisations (69%), also the gas and electricity multisectoralism at the employer side remains significant.

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	Pub.	Priv.	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
BE	Synergrid	EO	No	Yes	No	Yes	Yes	No	Yes	Yes	Electricity	SO
CZ	ČPS	BA	No	Yes	Yes	Yes	Yes	-	-	Yes	Heating	SO
DE	VAEU	EO	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Electricity and other public utilities	O
DE	BDEW	BA	Yes	Yes	Yes	Yes	Yes	-	-	Yes	Electricity, drinking water supply, sewage water	O
DE	BVEG	EO	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Geo-energy and crude oil production	O
DE	Zukunft Erdgas	Other	Yes	Yes	Yes	Yes	Yes	-	-	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	-	-	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	-	-	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
FR	AFG	BA	Yes	Yes	Yes	Yes	Yes	-	-	No		C
IT	Energia Libera	EO	No	No	Yes	Yes	Yes	-	-	Yes	Electricity, energy efficiency, electric mobility	SO
IT	ANIGAS	EO	No	Yes	Yes	Yes	Yes	No	Yes	No		S
IT	IGAS	EO	Yes	Yes	Yes	Yes	No	No	Yes	No		S
IT	Utilitalia	EO	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Environmental and water	SO
IT	Assogas	EO	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Environment	SO

Country	Organisation	Type	35.1	35.2	35.3	Territorial coverage	Types of businesses	Pub.	Priv.	Overlap	Overlap description	Domain
LT	NLEA	BA	No	Yes	Yes	Yes	Yes	-	-	Yes	Electricity, education	SO
NL	EN	BA				Yes	Yes	-	-	Yes	Electricity	SO
NL	WENB	EO				Yes	Yes	No	Yes	Yes	Electricity, waste management	SO
RO	FPGC	EO	Yes	Yes		Yes	Yes	-	-	Yes	Oil, extractive industry	SO
RO	ACUE	EO	No	Yes	Yes	Yes	Yes	-	-	Yes	Electricity	SO
SE	EFA	EO	N/A	N/A	N/A	Yes	Yes	-	Yes	Yes	Energy, electricity	SO
SE	Sobona	EO	N/A	N/A	N/A	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	-	-	Yes	Oil	O
EU 27	28 EO & BA		13	22	21	28	27	6	15	22		
	In 16 MS		9 MS	14 MS	14 MS	16MS	16 MS	5MS	10 MS	14 MS		

*C= Congruence, O= Overlap, S= Sectionalism, SO= Sectional overlap. In **bold** are members of EUROGAS. Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the presence of social partners organisations in the public and private sectors and the ranking of organisations.

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

Colour code, the pink marked organisations are not involved in CB and not affiliated to an EU Employer organisation, and as a consequence considered as Business Associations.

The blue marked organisations are those that are also organising companies in the electricity sector.

Data on membership is difficult to obtain, especially because of the prevalent overlapping representational domain. However, the density in the gas sector appears to be particularly high, especially in terms of employees covered, including because of the concentration of employment in a small number of large enterprises. This is supported by the sometimes-wide difference between the density rate 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

	Member enterprises	N. of EOs	Density (enterprises)	N. of EOs	Density (employees)
AT	-	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	-
DK	11	1 out of 1	8.5%	0 out of 1	-
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	-	0 out of 2	-	0 out of 2	-
SI	-	1 out of 1	90%	1 out of 1	90%
SK	53	1 out of 1	(Reported over 100%)	1 out of 1	95%

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

2.4 Gas employers' 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 (53%). On the other side, practically all organisations are involved in consultations over sector-related policies, mostly regularly (57%) or ad-hoc (33%). Only one employer association does not seem to be involved in consultations, the German VAEU, while for other two German associations relevant information could not be collected (BDEW and Zukunft Erdgas) (Table 13).

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

Country	Organisation	CB	Consultation	EU affiliation
AT	FGW	Yes	Regularly	EUROGAS
BE	FEPEG	Yes	Regularly	None
BE	Synergrid	Yes	Regularly	None
CZ	ČPS	No	Ad-hoc	EUROGAS
DE	VAEU	Yes	No	None
DE	BDEW	No	N/A	EUROGAS
DE	BVEG	Yes	Regularly	EUROGAS
DE	Zukunft Erdgas	No	N/A	EUROGAS
DK	DI	Yes	Regularly	BusinessEurope
EE	Eesti Gaasiliit	No	Ad hoc	None
ES	SEDIGAS	No	Regularly	EUROGAS
FI	Energiateollisuus	Yes	Ad hoc	None
FR	UNEMIG	Yes	Ad-hoc	EUROGAS
FR	AFG	No	Ad-hoc	EUROGAS
IT	Energia Libera	No	Regularly	None
IT	ANIGAS	Yes	Regularly	EUROGAS
IT	IGAS	Yes	Regularly	None
IT	Utilitalia	Yes	Regularly	None
IT	Assogas	Yes	Ad-hoc	None
LT	NLEA	No	Ad-hoc	IGU
NL	EN	No	Ad-hoc	None
NL	WENB	Yes	Regularly	None
RO	FPGC	No	Ad-hoc	None
RO	ACUE	No	Regularly	EUROGAS
SE	EFA	Yes	Regularly	None
SE	Sobona	Yes	Ad-hoc	None
SI	EZS	Yes	Regularly	None

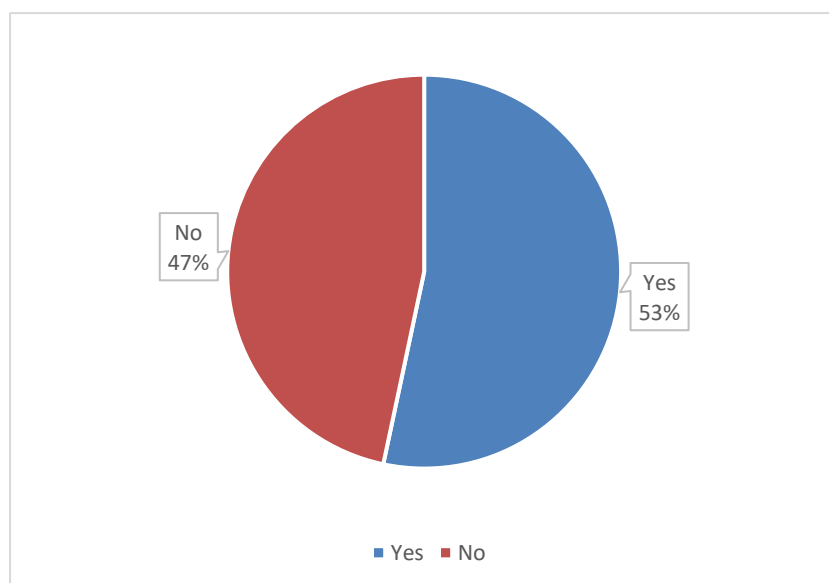
Country	Organisation	CB	Consultation	EU affiliation
SK	SPNZ	No	Regularly	None
EU 27	23 employers' organisations and 5 Business Associations (marked in pink), In 16 MS	16 EO 10 MS	Regular: 15 EO in 11 MS Ad-hoc: 10 in 9 MS None: 1 in 1 MS	EUROGAS: 10 in 7 MS BusinessEurope: 1 in 1 MS None: 16 in 10 MS

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

Colour code, the pink marked organisations are not involved in CB and not affiliated to an EU Employer organisation, and as a consequence considered as Business Associations.

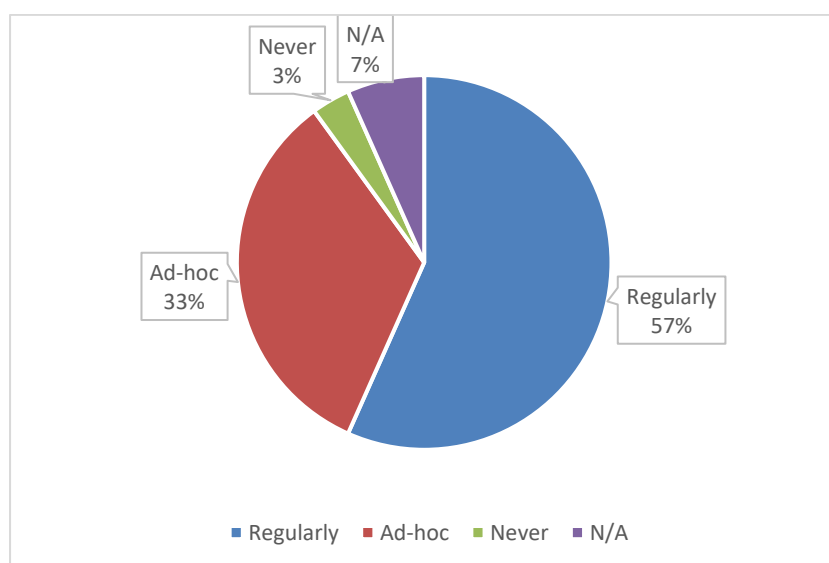
If we consider only involvement in collective bargaining and exclude policy consultation in our bottom-up approach (see section 1.4 above), 16 employer associations shall be considered, while the top-down approach identifies 12 sector-related national organisations, since they are affiliated to EUROGAS. Of the latter, four are also involved in sector-related bargaining. Therefore, the two criteria allow to identify 24 national employer organisations participating in sector-related collective bargaining and/or members of the sectoral EU level organisations. The remaining 6 national organisations appear to operate essentially as business associations.

Figure 8: Involvement of employer and business associations in collective bargaining in the gas sector, 2020 (%) (n=28)



Source: Network of Eurofound Correspondents’ national contributions to this study (2020).

Figure 9: Involvement of employer and business associations in different forms of policy consultations in the gas sector, 2020 (%) (n=28)



Source: Network of Eurofound Correspondents’ national contributions to this study (2020).

2.5 Bipartite and tripartite social dialogue bodies in the gas sector

20 sector specific bipartite and tripartite bodies for the gas sector are present in nine Member States (Table 14). Amongst such bodies, slightly more 12 are bipartite and 8 are genuinely tripartite. The bodies are equally distributed between statutory and collectively agreed bodies. They cover a wide array of topics. Health and safety and training are among the most common responsibilities of such bodies (DK, FI, FR, RO). Other bodies cover general sectoral issues (FR, HU, SI), including pensions and social security (FR and IT).

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

	Body	Type	Responsibilities	Statutory	TUs	EOs
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	FEBEG, Synergrid
BE	Fonds voor Aanvullende Vergoedingen / Supplementary payments	Bipartite	Financing additional payments that are available for employees within the JC	Statutory	ACV-BIE, CNE, Gazelco, ACLVB-CGSLB	FEBEG, Synergrid
BE	Syndicaal vormingsfonds / Trade union training fund	Bipartite	Financing of training for trade union militants	Statutory	ACV-BIE, CNE, Gazelco, ACLVB-CGSLB	FEBEG, Synergrid
DK	Branchefælles-skab for Arbejdsmiljø – BFA Industri (Trade association (BFA) for working environment – Industry)	Tripartite	Working environment	Statutory	Dansk Metal, 3F Industri, HK Privat, Dansk EI-Forbund (DEF), CO-industri, Fødevareforbundet NNF, Teknisk Landsforbund	Grakom Medie-arbejdsgiverne Dansk Mode og Textil Lederne
DK	Fagligt Udvalg for VVS-energiuddannelsen (Vocational committee for the education of HWS and HVAC – gas, heating, water, sanitation, ventilation and air-condition)	Tripartite	Vocational training/education	Statutory	Blik og Rør (The Danish Plumbers' Union)	Tekniq
DK	Industriens Uddannelser (Vocational committee for the industrial educations)	Tripartite	Vocational training/education	Statutory	Dansk Metal, 3F Industri (Secretariat with DI). Many more unions and employer organisations are part of the 'industrial educations' (among them Blik og Rør and Tekniq)	DI

	Body	Type	Responsibilities	Statutory	TUs	EOs
FI	National Forum for Skills Anticipation. The anticipation groups produce information on the competence, skills and educational needs of working life in the future.	Tripartite	Education	Agreement	(Finnish Electrical Workers Union is deputy member)	Finnish Energy
FI	Branch-specific committee of the Centre for Occupational Safety (part of the Industrial Group). The aim is to plan and implement services for their own sector that support and promote occupational health and safety work in workplaces.	Tripartite	Safety	Not available	The Trade Union Pro, the Finnish Electrical Workers Union, The Union of Professional Engineers in Finland	Palta
FR	Commission paritaire de branche (CPB)	Bipartite	Collective bargaining	Agreement (2013)	CFE-CGC Energies; FCE-CFDT ; FNEM-FO and FNME-CGT	UFE , UNEmIG
FR	Réunion de concertation et de coordination	Bipartite	Social dialogue	Agreement (2013)	CFE-CGC Energies; FCE-CFDT ; FNEM-FO and FNME-CGT	UFE , UNEmIG
FR	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
FR	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
FR	Commission Supérieure Nationale du Personnel	Bipartite	Application of the IEG status	Statutory	CFE-CGC Energies; FCE-CFDT ; FNEM-FO and FNME-CGT	UFE , UNEmIG
FR	Commissions Secondaires du Personnel (CSP)	Bipartite	Status (These joint bodies are 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

	Body	Type	Responsibilities	Statutory	TUs	EOs
FR	Caisse d'Assurance Maladie des IEG	Tripartite	Compulsory Social security scheme	Statutory	CFE-CGC Energies; FCE-CFDT ; FNEM-FO and FNME-CGT	UFE , UNEmIG
FR	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 TU 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, UILCEM UIL	Utilitalia and Anfida
RO	Sectoral committee for energy	Bi-partite	Education and professional qualifications	Agreement	FNSE Univers /Federația Națională a Sindicatelor din Electricitate Univers FSLI Energetica/Federația Sindicatelor Libere Independente "ENERGETICA", FSLI Petrol-Energie / Federația Sindicatelor Libere și Independente (FSLI) Petrol-Energie, FSGaz/Federatia Sindicatelor Gaz-Romania	FPPG/Federația Patronală Petrol și Gaze
SI	Economic and Social Committee for Energy	Tripartite	Legislation, sector's specifics, privatization. All legislation changes	Agreement	Slovenian Energy Workers' Union (SDE)	Energy Industry Chamber of Slovenia (EZS)

	Body	Type	Responsibilities	Statutory	TUs	EOs
			must be consulted and approved by social partners.			
EU 27	20 sector related SD bodies In 9 MS	12 Bipartite 8 Tripartite				

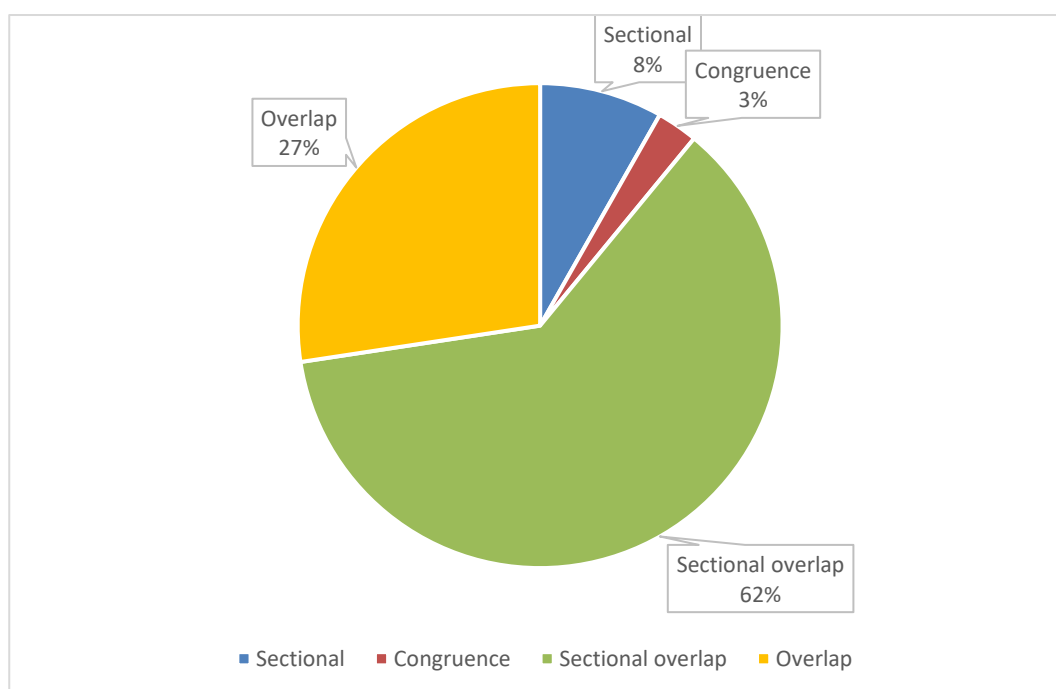
Source: Network of Eurofound Correspondents' national contributions to this study (2020)

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

2.6.1. 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 11 shows that the most common representational domain is sectional overlap (61%), followed by overlap (27%), sectional (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' national contributions to this study (2020)

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 the case 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 does 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. The Slovak Gas Trade union and the All-Poland Oil and Gas Mining Trade Union (the latter despite its name) 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 level and also because they cover only distribution and trade. They are ΣΕΔΕΣΦΑ (SEDESFA), EDA Attikis, EDA Thessalonikis, Thessalias, ΣΕΔΕΠΑ (SEDEPA), Zenith. The only Greek trade union with a different representational domain is the

Panhellenic Energy Federation (PEF or ΠΟΕ - POE), which covers other sectors besides gas. The other sectional trade union is the Croatian Trade Union of gas distribution and gas technic Croatia (SDPPTH). Trade unions with overlapping representation organise workers in the most diverse sector. Sometimes trade union representation extends to the electricity or energy sector, but there are no clear patterns. Other national sector-related trade unions represent workers in the chemicals industry, in industry, transport, mining, or even in most of or all sectors. Indeed, among sector-related trade unions, we can also find general unions and confederations.

Table 15: The gas sector trade unions their membership domain

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				OS UNIOS, SOSE
DE			ver.di	IGBCE
DK			Metal, 3F, IDA	
EL		ΣΕΔΕΣΦΑ (SEDESFA), EDA Attikis, EDA Thessalonikis, Thessalias, ΣΕΔΕΠΑ (SEDEPA), Zenith		ΠΟΕ (POE)
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	
IE			Connect, Unite	SIPTU
IT			Filctem-Cgil	Femca-Cisl, Uiltec-Uil
LT			LPPSF	
LV			LAKRS	
NL				FNV Publiek Belang, CNV
PL	OZZGNG		PPZ Kadra	SPCh NSZZ Solidarność

Country	Congruence	Sectionalism	Sectional overlap	Overlap
PT			FIEQUIMETAL , <i>SINDEL</i> , FETESE, SINERGIA, ASOSI	
RO			FS Gaz , UFS Atlas	
SE			Sveriges Ingenjörer Unionen , <i>Seko</i> , Ledarna	
SI			<i>SDE</i>	
SK	<i>POZ</i>			

Note: Members of IndustriALL are marked in bold, of EPSU in italics, and of both IndustriALL Europe and EPSU in bold italics

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

2.6.2. Reasons for pluralism of gas sector trade unions

This section provides an overview of the reasons for organisational fragmentation and pluralism in the 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 Member State. The reasons for having more than one trade union per country (where this is the case), are brought out in **Chyba! Nenalezen zdroj odkazů**.16. It shows that the most common reason is fragmentation. This includes having members in different parts of the sector or types of segments (e.g. electricity sector and energy sector), which is so in 7 countries, organising different categories of workers (e.g. blue-collar vs white-collar workers) in 8 countries, having members in different parts of the country in 7 countries and in different types of companies (e.g. in different size) in 3 countries. Pluralism, i.e. having similar membership domain, though differing in terms of ideology, is recorded in 9 countries.

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

MS	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 terms of ideology	Other reasons
AT						
BE						
BG						
CZ						
DE						
DK						

EE	No trade unions					
EL						1*
ES						
FI						
FR						
HR						2*
HU	Only one sectoral TU - No fragmentation					
IE						
IT						
LT	Only one sectoral TU - No fragmentation					
LU						
LV	Only one sectoral TU - No fragmentation					
NL						
PL						
PT						
RO						3*
SE						
SI				Only one TU		
SK	Only one sectoral TU - No fragmentation					
EU 27	8	4	2	12	8	2

Notes: Green shading indicates a positive response. (1) Reason for fragmentation in EL is that there is a separation between the permanent staff unions and the workers' unions of the subcontractor. (2) Reason for fragmentation in HR is there is almost no collaboration and co-operation between various TUs in the sector. (3) Reason for fragmentation in RO has to do with the history of the trade unions, competition among leaders, etc.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

2.6.3 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 domain 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).

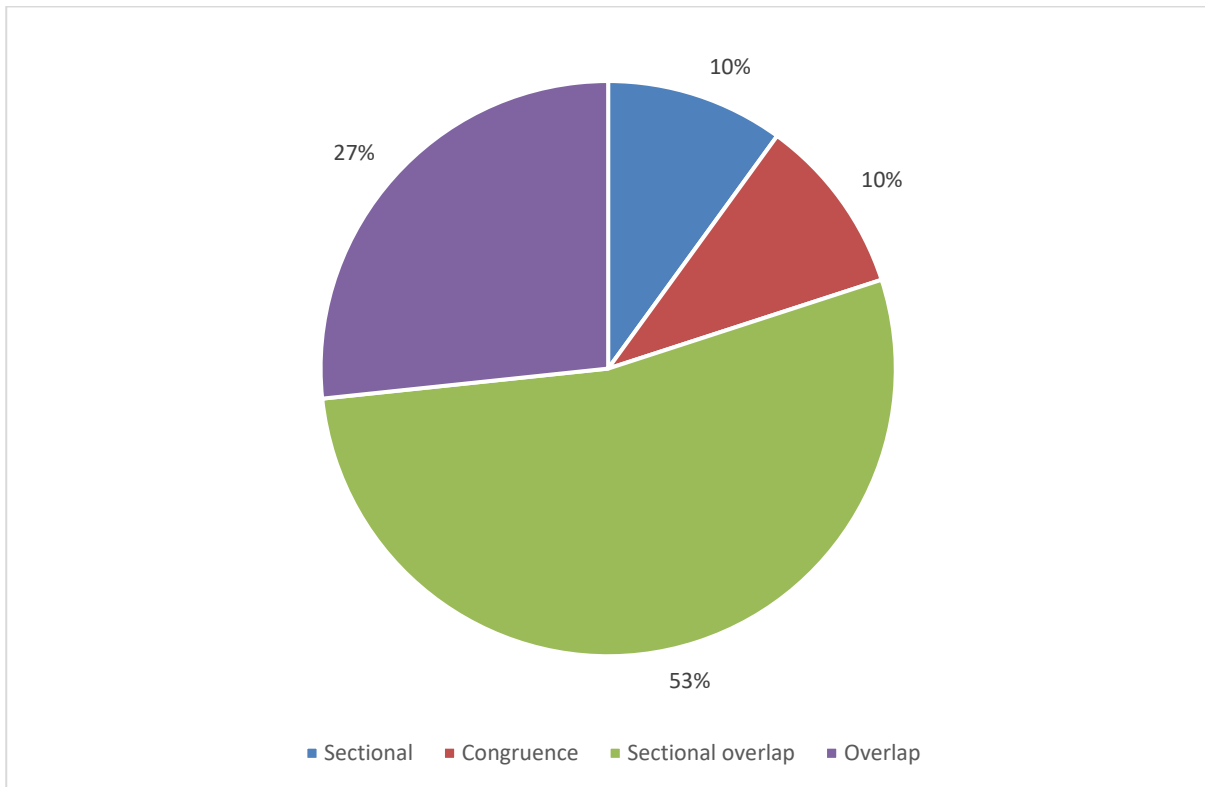
Table 17: Membership domain patterns of the sector-related employer and business associations in the gas sector, 2020

	Congruence	Sectionalism	Sectional overlap	Overlap
AT				FGW
BE			FEPEG, 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	
RO			FPGC, ACUE	
SE			EFA, Sobona	
SI				EZS
SK				SPNZ

Note: Members of EUROGAS are marked in bold.

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

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



Source: Network of Eurofound Correspondents' national contributions to this study (2020).

2.6.4 Reasons for pluralism in the gas sector employer organisations

Regarding employer organisations, there is an average of two organisations per Member State. There is a higher level of variation in the number of employer organisations per country compared to trade unions, as there are altogether 14 countries where there is only one or no employer organisations, compared to two such countries in case of trade unions.

The most prominent reason for fragmentation among employer organisations is having members in different parts of the gas sector/activities. This was seen also in section 2.3 looking at the width of the sectoral coverage, employers mostly have a narrow width in terms of segments covered, while trade unions tend to have a wider width. Still, there is one country where their members are different types of companies and two countries where other reasons. Detailed overview is brought out in Table 18 below.

Table 18: Reasons for fragmentation and pluralism of employer organisations

MS	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 terms of ideology	Other reasons
AT	1 EO in sector				
BE					
BG	No EO in sector				
CZ	1 EO in sector				
DE					(1)
DK					
EE					
EL	No EO in sector				
ES	1 EO in sector				
FI	1 EO in sector				
FR	No information provided				
HR	No EO in sector				
HU	1 EO in sector				
IE	No EO in sector				
IT					
LT	1 EO in sector				
LU	No EO in sector				
LV	No EO in sector				
NL	No information provided				
PL	1 EO in sector				
PT	No EO in sector				
RO					(2)
SE					

SI					
SK	1 EO in sector				
EU 27	2	4	15	3	0

Notes: Blue shading indicates a positive response. (1) Reason for fragmentation in DE is that they have similar membership domains, but different charters and tasks. (2) Reason for fragmentation in RO has to do with competing agendas, inter-personal relations, etc.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

2.6.5. Overview of the multi-sectoralism

As shown previously in sections 2.3 and 2.4, a significant share of trade unions (79%) as well as employer organisations (39%) have members from other sectors in addition to the gas sector. These are the organisations having sectional overlapping or overlapping domains.

Sections above show the main sectors covered by organisations, indicating the number of organisations as well as countries where the additional sectors occur in the organisations' domains. Several other sectors may appear simultaneously in the organisation's domain. There are some similarities as well as differences between trade unions and employers' organisations.

Trade unions tend to have more other sectors covered in their domain, compared to employer organisations, in terms of number of organisations as well as the number of countries. In fact, only Greece, Croatia, Poland and Slovakia have trade unions which are not engaged in any other sectors besides the gas sector, while there are 13 countries which do not have employer organisations covering other sectors (BG, DE, EE, ES, FR, HU, IE, IT, LU, NL, PL, PT, SK).

Among trade unions, the most common other sectors are energy and electricity sector (32% of trade unions), manufacturing (24%), all (18%) and state administration, education, health and/or research (9%). These are also in top of the employer organisations' list the energy and electricity sector (48%), followed by manufacture (11%), agriculture (11%) and construction and services (7%).

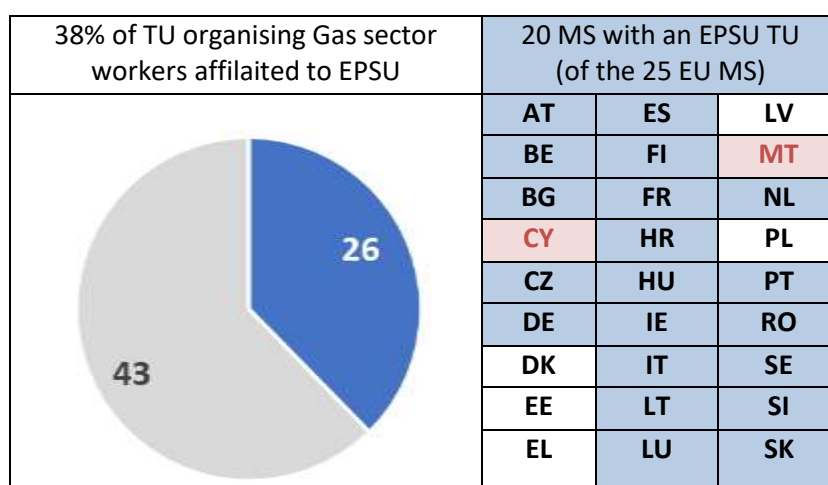
3. European level of interest representation

This chapter assesses the representativeness of the social partners at the European level in the following ways. First, the membership strength of EPSU, IndustriAll Europe and EUROGAS is analysed, based on the presence of national affiliates in each of the Member States 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 which operate in gas sector, if any.

3.1. Membership domain of EPSU

The European Federation of Public Service Unions (EPSU) is affiliated to 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: EPSU representing trade unions organising Gas sector workers (2019-2020)



Source: table 29

Of the 69 national trade unions active in the gas sector, 26 are members of EPSU (38%) in 20 Member States. If we consider membership data, as far as 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 total sectoral union members. EPSU has members in 20 Member States.

In 11 of the 24 Member States with sector-related trade unions, the trade union with most members in the gas industry is affiliated to EPSU. All the 24 members of EPSU engage in collective bargaining and 23 are part in some sort of social concertation, mostly on an ad-hoc basis (see section 2.2).

Table 19: Sector-related trade unions affiliated to EPSU

	Trade unions affiliated to EPSU	Trade unions not affiliated to EPSU	Is the trade union with most members in the sector affiliated to EPSU?
AT	younion	GPA-djp, PRO-GE	Yes
BE	GAZELCO	ACLVB-CGSLB, ACV-CSC BIE, ACV-CSC CNE	No
BG	НФХ КТ Подкрепа	НФТ "Химия и индустрия"	No
CZ	OS UNIOS, SOSE	None	Yes
DE	ver.di	IGBCE	No
DK	None	IDA, Metal, 3F	No
EE	No trade unions		
EL	None	EDA Attikis, EDA Thessalonikis Thessalias, Zenith, POE, SEDEPA, SEDESFA	No
ES	ELA, UGT-FICA	CCOO Industria, FI-USO,	Yes
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	CNV, FNV Publiek Belang	None	Yes
PL	None	OZZGNG, PPZ, Kadra, SPCh NSZZ Solidarność	No
PT	SINDEL	ASOSI, FETESE, FIEQIMETAL, SINERGIA	No
RO	FS Gaz	UFS Atlas	Yes
SE	Seko	Ledarna, Sveriges Ingenjörer, Unionen	N/A
SI	SDE	None	Yes
SK	POZ	None	Yes

Source: Network of Eurofound Correspondents' national contributions to this study (2020). Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the ranking of organisations.

There are 9 trade unions that are only represented by EPSU in the Gas sector ESSDC (Younion in Austria, Gazelco in Belgium, OS Unios and SOSE in Czechia, ver.di in Germany, JHL in Finland, SSKH in Croatia, **SINDEL in Portugal**, SEKO in Sweden, SDE in Slovenia and POZ in Slovakia). For Czechia, Slovenia and Slovakia, all sector related trade unions are only affiliated to EPSU. In Lithuania and the Netherlands also all national sector related trade unions are member of EPSU, though some of them are also affiliated to industriAll Europe. Indeed, there are 13 sector related trade unions that are affiliated to both EPSU and industriAll Europe.

Out of 24 EPSU members in the gas sector, seven cover workers in all sub-sectors of the gas sector. Six EPSU members cover workers in distribution and trade of gas, and two cover single sub-sector (for other members, activities coverage was not available).

Half of 24 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 covered workers in the public sector only, however, here no separate private gas sector existed.

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

	Trade unions affiliated to EPSU	Activities coverage	Private and public coverage	Ranking***
AT	younion	All	Both	3
BE	GAZELCO	All	Private only*	2
BG	НФХ КТ Подкрепа	35.2 and 35.3	Public only**	2
CZ	OS UNIOS, SOSE	35.2 and 35.3	Both	1 and 2
DE	ver.di	35.3	Both	2
DK	None	None	None	N/R
EE	No trade union			
EL	None	None	None	N/R
ES	ELA, UGT-FICA ³	All	Private only*	4
FI	JHL	35.2	Private only	2
FR	CFE-CGC Energies, FNEM-FO, FNME-CGT	All	Private only*	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	None	None	None	N/R
LV	None	None	None	N/R
NL	CNV, FNV Publiek Belang			
PL	None	None	None	N/R
PT	SINDEL	35.2 and 25.3	Private only*	2
RO	FS Gaz	All	Both	2
SE	Seko	N/A	Both	N/A
SI	SDE	All	Both	1
SK	POZ	All	Both	1

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

* No separate public gas sector was reported; ** No separate private gas sector was reported; ***ranking sequence does not correspond to the sequence of organisations.

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

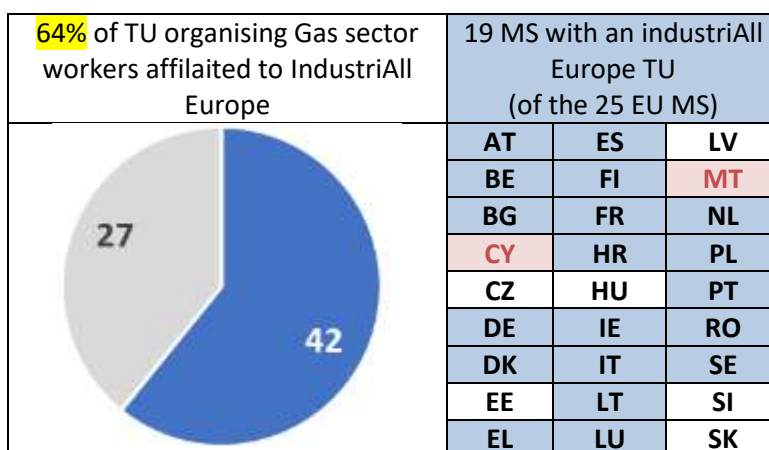
³ UGT-FICA is a member of EPSU and of IndustriAll Europe

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

3.2. Membership domain of IndustriAll Europe

IndustriAll Europe is affiliated to ETUC and represents workers in manufacturing, mining, and energy sectors, including the gas industry, across Europe. 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)



Source: table 29.

Note: As industriAll Europe is organising workers in several different economic sectors, all together it represents also trade unions in other sectors, in 27 different Member States, in the figure above are however only included gas sector related trade unions from 19 Member States that are affiliated to industriAll Europe.

Of the 69 national trade unions active in the gas sector, 45 are members of IndustriAll Europe (65%). If we consider membership data, as far as available, IndustriAll Europe’s affiliates represent 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 sectoral union members. IndustriAll Europe has members in 19 Member States⁴. 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. Of the 42 members of IndustriAll Europe, almost all or 40 engage in collective bargaining and 36 are part in some sort of social concertation, mostly on a regular basis. Among the IndustriAll Europe affiliates, only the Greek POE and the Danish IDA do not take part in collective bargaining (see section 2.2).

⁴ Only Gas sector trade unions affiliated are considered here. Looking at all sectors where industriAll Europe has member unions, this is the case in all 27 EU Member states.

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

	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	ACLVB-CGSLB, ACV-CSC BIE, ACV-CSC CNE	GAZELCO	Yes
BG	НФТ "Химия и индустрия", НФХ КТ Подкрепа	None	Yes
CZ	None ⁵	OS UNIOS, SOSE	No
DE	IGBCE	ver.di	Yes
DK	IDA, Metal, 3F	None	Yes
EE	No trade unions		
EL	POE	EDA Attikis, EDA Thessalonikis Thessalias, Zenith, SEDEPA, SEDESFA	Yes
ES	CCOO Industria, ELA, FI-USO, UGT-FICA		Yes
FI	Pro, TEK	JHL, YTN	Yes
FR	CFE-CGC Energies, FCE-CFD, FNEM-FO, FNME-CGT, CFTC-CMTE	SUD Energies, UNSA Energie	Yes
HR	SING, EKN	SDPPTH, SSKH	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
LV	None	LAKRS	No
NL	CNV, FNV Publiek Belang	None	Yes
PL	PPZ Kadra, SPCh NSZZ Solidarność	OZZGNG,	Yes
PT	FIEQIMETAL, SINDEL,	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

Source: Network of Eurofound Correspondents' national contributions to this study (2020). Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the ranking of organisations.

⁵ OS Echo is affiliated to industriALL Europe, but it reported not to have members in the GAS sector in Czechia.

There are 30 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 in Croatia, IG BCE in Germany, POE in Greece, All three Danish trade unions 3F Ida and Metal, CCOO industria and FI USO in Spain, TEK and PRO in Finland, FCE-CFDT and CFTC CMTE in France, SING in Croatia, VDSZ in Hungary, Connect in Ireland, Uiltec uil in Italy, Solidarnosc and PPZ Kadra in Poland, UFS Atlas in Romania and Sveriges Ingenjören and Unionen in Sweden). Only in Denmark are all the national sectoral trade unions only affiliated to industriAll Europe. In Bulgaria, Ireland, Italy, Lithuania, Luxemburg, the Netherlands and Romania, also all national sector related trade unions are affiliated to industriAll Europe, though some of them are also affiliated to EPSU. Indeed, there are 13 sector related trade unions that are affiliated to both industriAll Europe and EPSU.

Out of 42 IndustriALL Europe members in the gas sector, 10 cover workers in all sub-sectors of the gas sector. Seven members cover workers in distribution and trade of gas, and two cover manufacture and distribution (for other members, activities coverage was not available).

22 or half out of 42 IndustriALL Europe members in the gas sector cover workers in both public and private companies. 19 members cover workers only in the private sector, however, here, no separate public gas sector companies exist. Two members covered workers in the public sector only, however, here no separate private gas sector existed.

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

	Trade unions not affiliated to IndustriALL Europe	Activities coverage	Private and public coverage	Ranking***
AT	GPA-djp, PRO-GE	All	Private only	1, 2
BE	ACLVB-CGSLB, ACV-CSC BIE, ACV-CSC CNE	All	Private only*	1, 3, 4
BG	НФТ "Химия и индустрия", НФХ КТ Подкрепа	35.2 and 35.3	Public only**	1, 2
CZ	None	None	None	N/R
DE	IGBCE	35.1 and 35.2	Private only	1
DK	IDA, Metal, 3F	All	Both	N/A
EE				
EL	POE	35.2 and 35.3	Both	1
ES	CCOO Industria, ELA, FI-USO, UGT-FICA	All	Private only*	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*	1, 2, 3, 4
HR	SING	35.2 and 35.3	Both	1
IE	Connect, SIPTU, Unite	35.2 and 35.3	Both	1, 2, 3

	Trade unions not affiliated to IndustriALL Europe	Activities coverage	Private and public coverage	Ranking***
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
LV	None	None	None	N/R
NL	CNV, FNV Publiek Belang	All	Private only*	1, 2
PL	PPZ Kadra, SPCh NSZZ Solidarność	All	Both	1, 3
PT	FIEQIMETAL	35.2 and 35.3	Private only*	1
RO	FS Gaz, UFS Atlas	All	Both	1, 2
SE	Sveriges Ingenjörer, Unionen	35.1 and 35.2	Private only*	N/A
SI	None	None	None	N/R
SK	None	None	None	N/R

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

* No separate public gas sector was reported; ** No separate private gas sector was reported; ***ranking sequence does not correspond to the sequence of organisations. Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the presence of social partners organisations in the public and private sectors and the ranking of organisations.

As the distribution and trade activities are most important parts of the Gas sector, most of the affiliates of industriAll Europe organise both. Only IG BCE in Germany and Unionen and Sveriges ingenjörer Unionen in Sweden, are only organising the workers in the distribution activities, not in trade of gas.

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

Table below shows that national sector-related trade unions which are affiliated neither to EPSU nor to IndustriAll Europe. In total, there are 16 such trade unions in eight Member States, especially in Greece and Portugal (or around 20% of all sector trade unions in EU-27). Such unions are usually not among the larger national operators. Only LAKRS in Latvia appears to be the largest trade union in the gas sector, while EDA Attikis in Greece and OZZGNG in Poland are the second largest national trade unions in the gas sector.

Table 23: Sector-related trade unions affiliated to neither EPSU nor IndustriAll Europe

	Organisation	Ranking
FI	YTN	N/A
EL	EDA Attikis	2
EL	EDA Thessalonikis Thessalias	5
EL	Zenith	N/A
EL	ΣΕΔΕΠΑ (SEDEPA)	N/A
EL	ΣΕΔΕΣΦΑ (SEDESFA)	4
FR	CFTC-CMTE	6
FR	SUD Energies	6

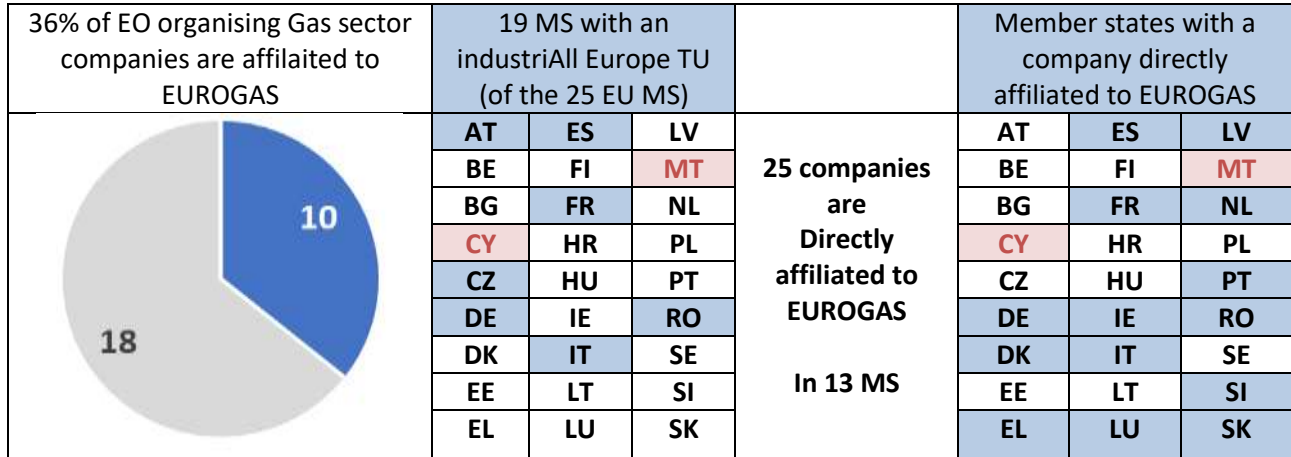
	Organisation	Ranking
FR	UNSA Energie	5
HR	SDPPTH	3
LV	LAKRS	1
PL	OZZGNG	2
PT	ASOSI	N/A
PT	FETESE	N/A
PT	SINERGIA	3
SE	Ledarna	N/A

Source: Network of Eurofound Correspondents' national contributions to this study (2020). Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the ranking of organisations.

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.

Figure 14: EUROGAS representing Gas sector employers organisations and companies (2019-2020)



Source: Table 24.

Of the 28 national employer and business associations in the gas sector, 10 are members of EUROGAS (or 36%). If we consider membership data, as far as available, EUROGAS's affiliates represent some 582 enterprises out of 849 affiliated to sector-related associations in the gas industry, or 70% of total sectoral affiliated companies. EUROGAS has members in seven Member States. In five 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 10 members of EUROGAS, four engage in collective bargaining and 8 are part in some sort of social concertation, mostly on a regularly basis.

Table 24: Sector-related employer associations affiliated to EUROGAS

	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	FEBEG, Synergrid	No
BG	No Employer associations		
CZ	ČPS	None	Yes
DE	BDEW, BVEG, Zukunft Erdgas	VAEU	No
DK	None	DI	No
EE	None	Eesti Gaasiliit	No
EL	No Employer associations		
ES	SEDIGAS	None	No
FI	None	Energiateollisuus	
FR	AFG, UNEMIG	None	Yes
HR	No Employer associations		
HU	No Employer associations		
IE	No Employer associations		

	Employer associations affiliated to EUROGAS	Employer associations not affiliated to EUROGAS	Is the employer association with most members in the sector affiliated to EUROGAS?
IT	ANIGAS	Assogas, Energia Libera, IGAS, Utilitalia	No
LT	None	NLEA	No
LU	No Employer associations		
LV	No Employer associations		
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

Source: Network of Eurofound Correspondents' national contributions to this study (2020). Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the ranking of organisations.

Amongst 10 members of EUROGAS, four members cover all activities in the sector, whereas three report having members in the distribution and trade of gas activities (for remaining, this information is not available, see Table 25). Three EUROGAS members cover both public and private sector, and four cover only private sector (although the public sector is not reported to exist in the respective countries).

Table 25: Sector-related employer associations affiliated to EUROGAS: Coverage and rankings

	Employer associations affiliated to EUROGAS	Activities coverage	Private and public coverage	Ranking**
AT	FWG	All	Both	1
BE	None	None	None	N/R
BG	No Employer associations			
CZ	ČPS	35.2 and 35.3	Both	1
DE	BDEW, BVEG, Zukunft Erdgas	All	Private only*	1
DK	None	None	None	N/R
EE	None	None	None	N/R
EL	No Employer associations			
ES	SEDIGAS	35.2 and 35.3	Private only*	1
FI	None	None	None	N/R
FR	AFG, UNEMIG	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	N/R

	Employer associations affiliated to EUROGAS	Activities coverage	Private and public coverage	Ranking**
LU	No Employer associations			
LV	No Employer associations			
NL	None	None	None	N/R
PL	No Employer associations			
PT	No Employer associations			
RO	ACUE	All	Both	2
SE	None	None	None	N/R
SI	None	None	None	N/R
SK	None	None	None	N/R

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

* No separate public gas sector was reported; **ranking sequence does not correspond to the sequence of organisations. Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the presence of social partners organisations in the public and private sectors and the ranking of organisations.

NOTE: the German employers organisation BVEG and the French UNEMIG are included in table 25 as EUROGAS member organisations, but are in 2022 no longer mentioned on the EUROGAS as member organisations

@Eurogas – JAMES Can you please check this and clarify this? Thank you.

Besides employer organisations, EUROGAS also has member companies in different EU countries (Table 19). These include 25 companies in 14 Member States. Together they employ almost 70,000 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 (Greece, Ireland, Luxembourg, Latvia, Netherlands, Portugal, Slovenia and Slovakia) and include companies which 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	CB	SD	Among Largest
DE	Gasag	1,787	Distribution and trade	Electricity, heat and water supply	Yes	N/A	
	GVC	N/A	N/A	Consultancy firm in different sectors	No	N/A	
	RWE Supply & Trading	1,600	Trade	Electricity trade, trade of raw materials or emission certificates	Yes	N/A	
	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

Country	Company	Employees	Sectors	Overlap	CB	SD	Among Largest
	VNG	1,200	Distribution and trade	None	No	N/A	
	Wintershall Dea	2,847	Production, distribution and trade	Oil sector	Yes	N/A	
DK	Evida	N/A	Distribution and trade	None	Yes	No	Yes
EL	DEPA	200	Trade	None	Yes	No	Yes
ES	Naturgy	509	Production, distribution and trade	Electricity	Yes	No	Yes
FR	ENGIE	4,000	Distribution and trade	Electricity, Renewal energy, energy services	Yes	Ad-hoc	Yes
	GRDF	12,595	Distribution	None	Yes	Regularly	Yes
	Total	2,000	Distribution and trade	Petrol, renewable energies	Yes	Ad-hoc	
IE	GNI	550	Distribution	None	Yes	Ad-hoc	Yes
IT	Edison	N/A	Production and trade	Electricity	Yes	Ad-hoc	
	ENI	14,392	Production, distribution and trade	Electricity, oil and chemical sector	Yes	Regularly	Yes
LU	ENOVOS	N/A	Production, distribution and trade	Renewable energy	Yes	No	
LV	Connexus Baltic Grid	350	Distribution	Transport via pipeline	Yes	Regularly	
	LG	N/A	Distribution and trade	None	Yes	Regularly	Yes
NL	Gasterra	140	Trade	None	Yes	Ad-hoc	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 of fuels	Yes	No	Yes
SK	SPP	N/A	Distribution and trade	Electricity	Yes	Regularly	Yes
SK	SPP-D	1,898	Distribution	None	Yes	Regularly	Yes

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

Furthermore, there are 16 employer organisations in the gas sector which are not affiliated to EUROGAS, in 11 Member States. In 10 Member States, the employer organisation not affiliated to EUROGAS is the largest employer organisation in the gas sector.

NOTE: the German company GVC and the Latvian company Connexus Baltic Grid are included in table 26 as EUROGAS member companies, but are in 2022 no longer mentioned on the EUROGAS as member organisations

@Eurogas – JAMES Can you please check this and clarify this? Thank you.

Table 27: Sector-related employer associations not affiliated to EUROGAS: Rankings

Country	Organisation	Rank
BE	FEPEG	1
BE	Synergrid	2
DE	VAEU	1
DK	DI	1
EE	Eesti Gaasiliit	1
IT	Energia Libera	N/A
IT	IGAS	3
IT	Utilitalia	1
IT	Assogas	4
LT	NLEA	1
NL	WENB	N/A
RO	FPGC	1
SE	EFA	1
SE	Sobona	N/A
SI	EZS	1
SK	SPNZ	1

Source: Network of Eurofound Correspondents' national contributions to this study (2020). Due to concerns over the reliability and comparability of the data, information needs to be treated with caution regarding the ranking of organisations.

3.5 Gas sector representativeness of EPSU, IndustriAll Europe and EUROGAS

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

The situation is similar in the countries with the higher shares of national employment in the gas sector, but overall gas sector employment has a small share of national employment. With the exception of Italy, these are usually smaller countries, with relatively weaker 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 (LV, PL and HR) or there is no multi-employer collective bargaining (RO, SK).

Table 28: Membership of EPSU, IndustriAll Europe and EUROGAS in the Member States with the highest shares of sector-related workers in EU 27 sector workforce

	TUs affiliated to EPSU	Involved in CB	TUs affiliated to IndustriAll	Involved in CB	EOs affiliated to EUROGAS	Involved in CB
DE	1 out of 2	Yes	1 out of 2	Yes	3 out of 4	Yes
PL	0 out of 3	N/R	2 out of 3	Yes	No EO	N/R
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
RO	1 out of 2	Yes	2 out of 2	Yes	1 out of 2	No MECB
ES	1 out of 4	Yes	4 out of 4	Yes	1 out of 1	No

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

Table 29: Membership of EPSU, IndustriAll Europe and EUROGAS in the Member States with the higher shares of sector-related workers in the national workforce

	TUs affiliated to EPSU	Involved in CB	TUs affiliated to IndustriAll	Involved in CB	EOs affiliated to EUROGAS	Involved in CB
LV	0 out of 1	-	0 out of 1	-	No EO	N/R
PL	0 out of 3	N/R	2 out of 3	Yes	No EO	N/R
HR	1 out of 3	Yes	1 out of 3	Yes	No EO	N/R
RO	1 out of 2	Yes	2 out of 2	Yes	1 out of 2	No MECB
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	-	0 out of 1	No MECB

Source: Network of Eurofound Correspondents' national contributions to this study (2020).

Table 30 summarises the key findings. There are 69 sector-related national trade unions in 24 Member States of which 24 (35%) are affiliated to EPSU, in 18 countries. If we consider collective bargaining, EPSU affiliates 24 of the 67 trade unions participating in collective bargaining in the gas sector, covering 18 of the 24 countries where collective bargaining takes place. Similarly, EPSU affiliates 23 of the 51 trade unions in 15 of the 20 countries where trade unions are consulted on sector-related policies. IndustriAll Europe has 42 members (61% of the total) in 19 countries. Among its affiliates, 40 participate in collective bargaining (60%

of the 67 organisations involved in sector-related negotiations). 34 of its affiliates are consulted on sector-related policies, in 18 of the 19 countries where such consultations take place.

Together EPSU and IndustriAll Europe have 57 single members, representing 78% of all sector-related unions, in 23 countries. 55 of their affiliates are involved in collective bargaining in 22 countries and 45 affiliates are part of sector-related consultations in 18 countries, representing some 80% of all trade unions in around 90% of countries.

There are 28 sector-related national enterprise organisations in 16 Member States of which 10 from seven countries are affiliated to EUROGAS. Four affiliates of EUROGAS take part in collective bargaining, in four countries out of the eight where negotiations take place. EUROGAS' affiliates participate in sector-related consultations with government in seven countries (out of 17). These are 10 associations out of 26 in the sector.

Table 30: Sector representativeness of EPSU, IndustriAll Europe and EUROGAS

	Number of organisations	Number of Member States with organisations	Number of organisations involved in collective bargaining	Number of Member States with organisations involved in collective bargaining	Number of organisations involved in policy consultation	Number of Member States with organisations involved in policy consultation
All sector-related trade unions	69	24	67	25	51	20
Affiliates of EPSU	24	18	24	18	23	15
% affiliated EPSU	35%	75%	36%	76%	45%	75%
Affiliates of IndustriAll Europe	42	19	40	19	36	18
% affiliate IndustriAll Europe	60%	80%	59%	76%	71%	90%
EPSU & IndustriAll Europe together	57	23	55	22	45	18
% EPSU & IndustriAll Europe together	78%	96%	77%	92%	78%	90%
All sector-related enterprise associations	28	16	16	8	26	17
Organisations affiliated to EUROGAS	10	7	4	4	10	7
% affiliated EUROGAS	36%	44%	25%	50%	38%	41%

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

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 to EU-level trade unions of national sector-related trade unions are linked to other sectors and to their overlapping representational domains.

The same happens for national employer associations and their affiliations to EUROGAS and possibly to other associations, mainly in the energy sector. Moreover, national sector-related enterprise organisations might be members of specific sectoral associations, like the ones listed below. Marcogaz for example is the technical association of the European gas industry, or NGVA, the association for the natural gas vehicles industry. These European associations are not representing their members on topics related to working conditions of employees. Some do however work on health and safety aspects. None of them appears to have cooperations 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 of the sector as a European Employers organisation. Eurogas has close cooperations with MARCOGAZ, GERG and also some other of the associations listed in the table below.

Table 31: other European associations in the gas sector

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 EU MS
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, i.e. GTE (Gas Transmission Europe), GSE (Gas Storage Europe) and GLE (Gas LNG Europe).	67 member companies from 22 EU MS
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 EU MS
Gas Naturally www.gasnaturally.eu	Gathers 8 european or international associations, like GERG, GIE, IOPG IGU, Liquid Gas Europe, Marcogaz, NGVA and EUROGAS	8 EU associations incl EUROGAS
IOPG International Association of Oil and Gas Producers	80 member companies, of which 30 in the EU. IOPG members produce 40% of the worlds oil and gas, and 90% of Europes indigenous supplies. Forum for sharing experiences, also 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 23 Member States	23 MS
Liquid Gas Europe https://www.liquidgaseurope.eu/members	Associations representing interests on LNG from 16 MS and 7 multinational LNG producing companies	16 MS

NGVA Europe National Bio Gas Vehicle Association https://www.ngva.eu/who-we-are/	Represents the interests of companies (from 24 MS) distributing bio-gas and LNG for vehicles, fuel stations, etc	24 MS
Source: Network of Eurofound Correspondents' national contributions to this study (2020) & 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 which is now reduced to only two different types of members, employers originations and member companies (to be checked -with last version of statutes, EUROGAS can you please send last version of your statutes?).

Eurogas is member of the Gas ESSDC since it was established in 2007. It has 12 staff members of which 4 are regarly involved in activities of the European Sector Social Dialogue committee for the Gas sector. EUROGAS its activities are for 95% based on membership fees of its affiliated organisations. It has a publicly available website, but no members only intranet.

EUROGAS has a capacity to negotiate on behalf of the affiliated employers organisations and companies, in general, with decision making procedures in general, not specifically for the agreement of texts from the European Social Dialogue. Within EUROGAS there is a Gas Advocacy Group that works on ESSDC issues as working committee. Issues that need formal approval within EUROGAS are approved within the EUROGAS Strategy Committee and send to the EUROGAS Board for ratification. The 2020 joint statement on "Just Transition" for example was discussed within the Gas Advocacy Group, and approved by the EUROGAS Board. Members were kept informed via e-mail, and this is also how decisions were taken

EPSU has a proven capacity to negotiate based on its activities in other sectors; The EPSU constitution⁶ stipulates that the positions EPSU in sectoral Social Dialogue are to be based on policies adopted by Congress. Congress and the Executive Committee are the highest EPSU governing bodies. Congress, the supreme body, meets in ordinary session at least every 5 years and decides on the core EPSU matters. The Executive Committee manages EPSU's the affairs between Congresses. It meets at least twice a year and determines the EPSU mandate in the inter-sectoral and sectoral social dialogue

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 the EPSU program 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 Standing Committee ensuring a proper balance between expertise on the subject, regions, 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 a representative of all EU member states insofar as possible. It 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 consider the final result of a sectoral negotiation. It forwards a recommendation to adopt or reject for approval by the Executive Committee.

⁶ <https://www.epsu.org/de/node/6170>

industriAll Europe, was created in June 2012, by 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 was representing workers in SSDC Gas before 2012, EMCEF was member of the ESSDC since 2007. When EMCEF, EMF and ETUF:TCL have decided to join forces into industriAll Europe, industriAll Europe directly became a member of ESSDC as a successor organisation. EMCEF has 25 staff members, of which 2 are regularly involved in activities related to the Gas sector European social dialogue. In terms of its autonomy, industriAll Europe its budget is based for 95% on membership fees, of the member organisations. It has a website with a member only section to share internal documents regarding meetings, 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.

For IndustriAll Europe, the promotion of social dialogue at all levels is mentioned in this article. Besides this, their involvement in the European sector social dialogue is not explicitly mentioned. On this basis IndustriAll Europe is not equipped with an explicit permanent statutory mandate to negotiate on behalf of their members in matters of the European social dialogue.

Rather, IndustriAll Europe's statutes provide for detailed mandate procedures in relation to the nominations for 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 capacity to negotiate binding agreements, such as the NEPSI agreement,⁷ which does however not cover workers in the Gas sector. No binding European sectoral social dialogue agreements have yet been reached specifically for the GAS sector.

⁷ This is the agreement on workers' health protection through the good handling and use of crystalline silica and products containing it.

The number of joint texts agreed between EPSU, industriAll Europe and EUROGAS are the 6 texts, listed in the table below.

Table 32: Joint documents produced by the Gas ESSDC (2007/2020)

Title	Type	Date
Joint statement on just transition	Joint opinion	23/11/2020
Contribution regarding Energy Roadmap 2050	Joint opinion	09/12/2011
Toolkit. Demographic Change, Age Management and Competencies in the Gas Sector in Europe	Tool	15/10/2009
Joint declaration on violence at work	Declaration	15/11/2007
Common declaration of EMCEF, EPSU and EUROGAS on ECOTEC study on the impact on employment in EU-25 of the opening of electricity and gas markets, and of key EU directives in the field of energy	Declaration	15/11/2007
Rules of procedure of the Social Dialogue Committee for the natural Gas sector	Procedural text	15/06/2007

Source: European Commission, *Social dialogue text database*, <https://ec.europa.eu/social/main.jsp?catId=521&langId=en>

3.8 Effective participation in European Social Dialogue meetings

Looking at participation in the ESSDC for the GAS sector for the years 2019 and 2020 (Table 32), the trade union side had participants from 10 Member States and the employer delegation had participants from 7 Member States.

In 2019 there was only one meeting, in October. While for 2020 the Gas ESSDC held 3 meetings, one in January, one in September and a third one in November.

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

	In 2019	In 2020	In either 2019 or 2020
Member States with trade union participation in the ESSDC for the gas sector in 2019	10 MS BE, CZ, DE, ES, FR, HU, IT, PT, RO, Sk	8 MS BE, CZ, ES, FR, HU, IT, PT, RO (+Norway)	10 MS BE, CZ, DE, ES, FR, HU, IT, PT, RO, SK
MS where EPSU has an affiliate but no participation in ESSDC	(AT, BG, FI, HR, IE, LT, NL, SE, SI, SK).		
MS where industriAll Europe has an affiliate but no participation in ESSDC	(AT, BG, DK, EL, FI, HR, IE, LT, LU, NL, PL, SE).		
Member States with employer participation in the ESSDC for the gas sector in 2019	6 MS BE, CZ, DE, ES, FR, RO	6 MS CZ, DE, ES, FR, IT, RO (+Norway)	7 MS BE, CZ, DE, ES, FR, IT, RO
MS where EUROGAS has an EO affiliated but no participation in the ESSDC	AT, BG,		
MS where EUROGAS has a company affiliated but no participation in the ESSDC	DK, EL, IE, LU, LV, NL, PT, SI, SK		

Source: Eurofound and European Commission.

Colour code: the black rows indicated the EU Member States for which there were participants in the ESSDC meetings. The red rows indicate the countries for which the EU social partners organisations have national affiliates, but none of them participated in any of the ESSDC meetings in 2019 or 2020.

In chapter 1 it has been indicated that the gas sector employment is highly concentrated in a small number of countries. The five larger 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. Among those countries with a relatively large proportion of the EU sectoral workforce, four of the five have been represented by both the trade union and the employer's side. Only for Poland, there has not been any participation in any of the meetings in 2019 or 2020.

EPSU has an affiliated sector related trade union in 10 Member States, for which there has not been any trade union participating in a meeting of the ESSDC in either 2019 or 2020. These 10 member States are marked in red in the table above. It is Austria, Bulgaria, Finland, Croatia, Ireland, Lithuania, Netherlands, Sweden, Slovenia, and Slovakia. For industriAll Europe this is the case for 12 Member States, where they do have a sector related trade union affiliated, but none of them participated in any of the ESSDC meetings in 2019 or 2020 (AT, BG, DK, EL, FI, HR, IE, LT, LU, NL, PL, SE).

For EUROGAS there are affiliated employers' organisations in Austria and Bulgaria, while for 2019 and 2020 there was no participation in the ESSDC. Adding the 9 Member States (DK, EL, IE, LU, LV, NL, PT, SI, SK) where EUROGAS has a company directly affiliated, but also no participation in the ESSDC meetings, gives 10 Member States with an 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 6 Member states, the numbers of workers in the other Member states are relatively small. The group with the largest gas sector workforce is in Germany, Poland, Italy, France, Romania and the Netherlands. Among them Germany has with 25,344 most workers in the sector and the Netherlands counts for about 8,000. A second group of countries varies between 2,000 and 4,500 workers in the sector, including Czechia, Hungary, Spain, Croatia and Slovakia. While for Austria, Bulgaria, Denmark, Ireland, Latvia, and Portugal, the sectoral workforce is between 1,500 and 700. Leaving a gas sectoral workforce below 500, in Belgium, Estonia, Finland, Greece, Lithuania, Luxemburg, 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 actors.

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

Large enterprises are common in the sector, and this facilitates industrial relations and the organisation of sectoral organisations and relative 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 the company-level. In 13 of the 25 Member States, there is single employer bargaining only. This is the case for Bulgaria, Czechia, Greece, Croatia, Hungary, Ireland, Lithuania, Luxemburg, Latvia, Poland, Portugal, Romania, and Slovakia. For nine of these 13 Member States there is also no sectoral employer's organisation to bargain with. No employers' organisations were identified for Bulgaria, Greece, Croatia, Hungary, Ireland, Luxemburg, Latvia, Poland, and Portugal. The four member states with a sectoral employers' organisation, but without multi-employer bargaining at sector level, are Czechia, Lithuania, Romania, and Slovakia. For Romania there is besides company level collective bargaining also a bi-partite 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. For Estonia there is no trade union organising the 246 persons working in the sector there. Subsequently there is no collective bargaining at all 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 employers organisations. Multi-employer sectoral level negotiations only take place in Austria, Denmark, Finland, Sweden, and Slovenia. A combination of multi-employer bargaining and company level single employer bargaining, occurs in the gas sector in Belgium, Germany, Spain, France, Netherlands, and Italy.

This study identified 69 sector-related trade unions in 24 Member States. For Estonia there is no trade union and Malta, and Cyprus were not included in this study. There are 67 of the 69 sectoral trade unions involved in collective bargaining. Looking at the multisectoralism, 52 of the 69 gas sector trade unions (75%) are also organising workers in the electricity sector. In 16 Member States all the gas

sector trade unions are also covering the electricity sector, while for 3 other Member States 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, Germany and France is 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 69 sectoral trade unions, this study identified 23 employers' organisations and 5 business associations, in total 28 organisations in 16 countries. The 23 Employers organisations are involved in collective bargaining, and because the 5 others are not, they are considered as business associations. Just like among the trade unions, most of sector related employers' 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, there are 13 (50%) that are organising both gas and electricity employers. Looking at the Member States with the largest sectoral workforce, the Netherlands is the only one among the 6 Member States where all gas sector employers' organisations also organise electricity sector employers. The other member states with a rather large sectoral workforce have some of the employers' organisation also organising electricity sector employers, but not all. Poland is among the Member States with a relatively high sectoral workforce, but without an employers' 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 is present in 24 countries, with the only exception of the above-mentioned case of Estonia and involves 67 trade unions and 14 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 enterprise organisations.

At European level there are two sectoral trade union organisations, EPSU and industriAll Europe, and one European Employers organisation, EUROGAS.

There are 14 sectoral trade unions that are affiliated to both EPSU and industriAll Europe. Among them are 8 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 Luxemburg and FNV from the Netherlands. This is sectoral representativeness that both EPSU and industriAll Europe represent in the Gas ESSDC. It has to be noted that the largest sectoral trade union 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 both represented by EPSU and industriAll Europe, there are also 29 gas sector trade unions that are only affiliated to industriAll Europe, and 9 that are only affiliate to EPSU.

Industrial Europe represents 45 sectoral trade unions (65%) in 19 Member States. Of them there are 30 that are only affiliated to industriAll Europe and 14 that are affiliated to both industriAll Europe and EPSU. industriAll Europe has the largest sectoral trade union affiliated in 18 Member States. And for Belgium, Bulgaria, Germany, Denmark, Greece, Finland, Croatia, Poland and Portugal (9 MS) the largest sectoral trade union is only affiliated to industriAll Europe. Among them are IG BCE from Germany and Solidarnosc from Poland that are the largest sectoral trade unions in two countries among those with the largest sectoral workforce. 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 provided membership numbers, IndustriAll's affiliates represent some 49,000 workers out of almost around 66,000 unionised workers in the gas industry, or 74% of total sectoral union members. Of the 42 members of IndustriAll, 40 engage in collective bargaining and 36 are part in some sort of social concertation, mostly on a regularly basis.

Most of the industriAll Europe member unions organise both the distribution and the trade activities. Only in Germany and Sweden, industriAll Europe is only representing the workers in the distribution of gas, not in the trade activities. As such, industriAll Europe has affiliates organising workers in distribution of gas in 19 Member States, and for workers in trade of gas this is the case in 17 Member States.

EPSU has 24 affiliated gas sector trade unions, also in 19 Member States. Among them are 11 trade unions that are only represented by EPSU in the ESSDC, and 13 that are represented both by EPSU and industriAll Europe. Based on the provided membership numbers, EPSU's affiliates represent some 43,000 workers out of almost around 66,000 unionised workers in the gas industry, or 65% of total sectoral union members. The trade unions with most sectoral members, are affiliated to EPSU in 11 Member States. The largest sectoral trade union from 4 Member States is only affiliated to EPSU. This is the case for Austria, Czechia, Slovenia, and Slovakia. All the 24 members of EPSU engage in collective bargaining and 23 are part in some sort of social concertation, mostly on an ad-hoc basis.

Most of the EPSU affiliated unions organise workers in both distribution and trade of gas. Only in Germany the EPSU affiliated is only organising workers in the trade activities. In Finland the EPSU affiliate is only organising the workers in the distribution of gas activities. As such EPSU has members organising the 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 higher shares of sectoral employment in the EU and also in countries with the higher incidence of sectoral employment, with one exception for the latter. Neither IndustriAll nor EPSU have, in fact, 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 10 are 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 total sectoral affiliated companies. EUROGAS has members in seven Member States. In five 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 10 members of EUROGAS, four engage in collective bargaining and 10 are part in some sort of social concertation, mostly on a regularly basis. Besides enterprise organisations, EUROGAS has member companies in different EU countries. This contributes to consolidate the membership basis of EUROGAS, as they cover countries where EUROGAS has no affiliated organisations (Greece, Ireland, Luxembourg, Latvia, Netherlands, Portugal, Slovenia and Slovakia) and include companies which are not affiliated to the national members of EUROGAS (for instance, RWE and Thüga in Germany, and AIK-Energy). This study shows that no other EU employer organisations have representativeness in 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: Abbreviations National trade unions

Country	Organisation*	Fullname	English
AT	GPA-djp	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	Union of Salaried Private Sector Employees, Graphical Workers and Journalists
AT	PRO-GE	Produktionsgewerkschaft	Production (Manufacturing) Union
AT	<i>younion</i>	younion_Die Daseinsgewerkschaft	younion - The Existence Union
BE	ACLVB-CGSLB	Algemene Centrale Der Liberale Vakbonden - Centrale Générale des Syndicats Libéraux de Belgique	General Federation Of Liberal Trade Unions
BE	ACV-CSC BIE	ACV-CSC Bouw Industrie en Energie	ACV-CSC Construction, Industry and Energy
BE	ACV-CSC CNE	Centrale nationale des employés	National white collar federation
BE	<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"
BG	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
CZ	<i>SOSE</i>	Svaz odborových sdružení ENERGIE	Federation of trade unions ENERGIE
DE	IGBCE	Industriegewerkschaft Bergbau Chemie Energie	Mining chemicals and energy workers union
DE	<i>ver.di</i>	Vereinte Dienstleistungsgewerkschaft	United Service Union
DK	3F	Fagligt Fælles Forbund	United Federation of Danish Workers
DK	IDA	Ingeniørforeningen i Danmark	The Danish Society of Engineers
DK	Metal	Dansk Metal	Danish Metalworkers' Union
EL	EDA Attikis	Ένωση Εργαζομένων Φυσικού αερίου Αττικής	Employees' Association of natural Gas of Attica
EL	EDA Thessalonikis Thessalias	Ένωση Εργαζομένων Εταιρείας Διανομής Αερίου Θεσσαλονίκης-Θεσσαλίας	Employees' Association of the Thessaloniki – Thessalia distribution company
EL	Zenith	Ένωση Εργαζομένων Εταιρείας Προμήθειας Αερίου Θεσσαλονίκης-Θεσσαλίας	Union of employees of supply company of Thessaloniki –Thessalia
EL	ΠΟΕ (ΡΟΕ)	Πανελλήνια Ομοσπονδία Ενέργειας	Panhellenic Energy Federation (PEF)
EL	ΣΕΔΕΠΑ (SEDEPA)	Σύλλογος Εργαζομένων στη ΔΕΠΑ	Employees' union in DEPA
EL	ΣΕΔΕΣΦΑ (SEDESFA)	Σύλλογος Εργαζομένων στη	Employees' Union of DESFA
ES	CCOO Industria	Comisiones Obreras Industria	Workers' Commissions, Industrial
ES	ELA	Euskal Langileen Alkartasuna	Solidarity of Basque Workers

Country	Organisation*	Fullname	English
ES	FI-USO	Federación de Industria de Unión Sindical Obrera (Sector Energía)	Federation of Industry of Unión Sindical Obrera (Energy Sector)
ES	UGT-FICA	UNION GENERAL DE TRABAJADORES FEDERACION DE INDUSTRIA CONSTRUCCION Y AGRO	General Workers' Union, Federation of Industry, Construction and Agriculture
FI	<i>JHL</i>	Julkisten ja hyvinvointialojen liitto	The Trade Union for the Public and Welfare Sectors
FI	Pro	Prolitto	The Pro Trade Union
FI	TEK	Tekniikan Akateemiset	Academic Engineers and Architects in Finland
FI	YTN	Ylemmät Toimihenkilöt	Federation of Professional and Managerial Staff
FR	CFE-CGC Energies	CFE-CGC Energies	CFE-CGC Energies
FR	CFTC-CMTE	CFTC- Fédération Chimie Mines Textile Energie	CFTC- Fédération Chimie Mines Textile Energie
FR	FCE-CFDT	Fédération Chime Energie - CFDT	Federation Chemical and Energy - CFDT
FR	FNEM-FO	Fédération nationale Energie et Mines – Force Ouvrière	National Federation Mines and Energy – Force Ouvrière
FR	FNME-CGT	Fédération nationale Mines Energie - CGT	National Federation Mining and Energy
FR	SUD Energies	SUD Energies	SUD Energies
FR	UNSA Energie	UNSA Energie	UNSA Energy
HR	SDPPTH	Sindikát distribucije plina i plinske tehnike Hrvatske	sometime sin oil and mining
HR	SING	Sindikát naftnog gospodarstva	Oil Economy Trade Union
HR	<i>SSKH</i>	Sindikát u komunalnim i srodnim djelatnostima Hrvatske	Autonomous trade union of workers in public utilities and related services of Croatia
HU	<i>VDSZ</i>	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 Union	Connect
IE	SIPTU	Services Industrial Professional Technical Union	Services Industrial Professional Technical Union
IE	Unite	Unite the Union	Unite the Union
IT	Femca-Cisl	Federazione Energia Moda, Chimica e Affini	Energy, Chemicals and Allied Industries Federation
IT	Filctem-Cgil	Federazione italiana lavoratori chimici, tessile, energia, manifatture	Italian Federation of Chemicals, Textile, Energy and Manufacturing Workers
IT	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
LU	OGB-L	Syndicat services et énergie de l'OGB-L	Service and energy Trade union OGB-L

Country	Organisation*	Fullname	English
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
NL	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
PL	PPZ Kadra	Porozumienie Związków Zawodowych Kadra	Trade unions Alliance “Kadra”
PL	SPCh NSZZ Solidarność	Sekretariat Przemysłu Chemicznego NSZZ Solidarność	Chemical Industry Workers’ Secretariat of NSZZ Solidarność
PT	ASOSI	Associação Sindical dos Trabalhadores do Sector Energético e Telecomunicações	Trade Union Association of Energy and Telecommunications Workers
PT	FETESE	Federação dos Sindicatos da Indústria e Serviços	Federation of Industry and Services Unions
PT	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
PT	<i>SINDEL</i>	Sindicato Nacional da Indústria e Energia	National Industry and Energy Union
PT	SINERGIA	Sindicato da Energia	Energy Trade Union
RO	FS Gaz	Federatia Sindicatelor Gaz-Romania	Federation of Gas Trade Unions
RO	UFS Atlas	Uniunea Federativă Sindicală "ATLAS"	Federative Union of Trade Unions „Atlas”
SE	Ledarna	Ledarna	Ledarna
SE	<i>Seko</i>	Service och kommunikationsfacket	Swedish Union for Service and Communications Employees
SE	Sveriges Ingenjörer	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
SE	Unionen	Unionen	Unionen
SI	<i>SDE</i>	Sindikát delavcev dejavnosti energetike	Slovenian Energy Workers` Union
SK	<i>POZ</i>	Plynarensky odborovy zväz	Slovak Gas Trade Union

* Members of ETF are marked in bold;

Table 35: Abbreviations National employer associations

Country	Organisation	Fullname	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
BE	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
DE	BVEG	Bundesverband Erdgas, Erdöl- und Geoenergie e.V.	Federal Association for Natural Gas, Crude Oil and Geoenergy
DE	VAEU	Arbeitgeberverbände energie- und versorgungswirtschaftlicher Unternehmen	Employers association of energy companies
DE	Zukunft Erdgas	Zukunft Erdgas	Future Natural Gas
DK	DI	DI	Confederation of Danish Industry
EE	Eesti Gaasiliit	EGL	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
FR	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
IT	Assogas	Assogas	Assogas
IT	Energia Libera	Energia Libera	Free Energy
IT	IGAS	Imprese Gas	Gas Companies
IT	Utilitalia	Utilitalia	Utilitalia
LT	NLEA	Nacionalinė Lietuvos energetikos asociacija	National Energy Association of Lithuania
NL	EN	Energie Nederland	Energy Netherlands
NL	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
RO	FPGC	Federația Patronală Petrol și Gaze	Oil and Gas Employers' Organisation
SE	EFA	Energiföretagens Arbetsgivareförening	Sweden Energy
SE	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.

Annex 2: The gas sector in the UK

This study identified 4 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: National trade unions

Country	Organisation	EU affiliation	CB	Consultation	Membership strength ranking
UK	GMB	EPSU, IndustriAll	Yes	Ad-hoc	1
UK	<i>Prospect</i>	EPSU	Yes	Ad-hoc	2
UK	<i>UNISON</i>	EPSU	Yes	Ad-hoc	3
UK	UNITE	EPSU, IndustriAll	Yes	Ad-hoc	4

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

* No separate public gas sector was reported; ** No separate private gas sector was reported;
 ***ranking sequence does not correspond to the sequence of organisations

Two gas sector employers organisations were found in the UK, they are not involved in collective bargaining but are both affiliated to EUROGAS. There are also 5 UK companies directly affiliated to EUROGAS, of which one reported to be involved in collective bargaining.

Table 37: National employer organisations

Country	Organisation	Type	EU affiliation	CB	Consultation	Membership strength ranking
UK	Energy Networks Association	BA	EUROGAS	No	Regularly	1
UK	Energy UK	BA	EUROGAS	No	Regularly	2

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

* No separate public gas sector was reported; **ranking sequence does not correspond to the sequence of organisations

Table 38: Sector-related companies affiliated to EUROGAS

Country	Company	Employees	Sectors	Overlap	CB	SD	Among Largest
UK	AIK Energy	41	Trade	Oil, electricity, LPG, fuels	No	Ad-hoc	
UK	Cheniere Marketing Limited	N/A	Trade	None	No	No	
UK	ITM Power	180	Production	None	No	No	
UK	Sempra Energy	N/A	N/A	N/A	N/A	N/A	
UK	Shell Energy	N/A	Production and trade	Energy	Yes	No	

Source: Network of Eurofound Correspondents' national contributions to this study (2020)

Table 39: LIST OF NATIONAL CORRESPONDENTS that contributed to this study

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