



European Foundation for the Improvement of Living and Working Conditions

Representativeness of the social partners: Gas sector

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This report examines the operations of the social partner organisations and collective bargaining in the gas sector. The first part outlines the general economic background. The next part analyses the social partner organisations in the Member States of the European Union, with the exception of Cyprus. Particular emphasis is placed on membership of social partner organisations, their role in collective bargaining and public policy, and their national and European affiliations. The third and final part of the report examines the relevant European associations, in particular the composition of their membership and their capacity to negotiate.

The aim of the EIRO series of studies on representativeness is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. The impetus for these studies arises from the goal of the European Commission to recognise the representative social partner organisations to be consulted under the EC Treaty provisions. Hence, this study is designed to provide basic information required to establish sectoral social dialogue.

Objectives of study

The aim of this **representativeness** study is to identify the relevant national and supranational associations – the **trade unions** and **employer organisations** – in the field of industrial relations in the gas sector, and show how these actors relate to the sector’s European interest associations of labour and business. The impetus for this study and for similar studies in other sectors arises from the aim of the **European Commission** to identify the representative social partner organisations to be consulted under the provisions of the EC Treaty. Hence, the study aims to provide the basic information needed to set up sectoral **social dialogue**. The effectiveness of the European social dialogue depends on whether its participants are sufficiently representative in terms of the sector’s relevant national actors across the EU Member States. Therefore, only European organisations which meet this precondition will be allowed to join the European social dialogue.

Against this background, the study will first identify the relevant national and European social partner organisations, subsequently 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 of interest representation. The study includes only organisations whose membership domain is ‘sector-related’ (see below). At both the national and European levels, a multiplicity of associations exists which are not considered to be social partner organisations as they essentially deal with industrial relations. Thus, there is a need for clear-cut criteria which will enable analysis to differentiate the social partner organisations from other associations.

As regards the national level associations, classification as a sector-related social partner organisation implies fulfilling one of two criteria: the associations must either be a party to sector-related **collective bargaining** or a member of a sector-related European association of business or labour that is on the Commission’s list of European social partner organisations consulted under Article 138 of the EC Treaty and/or that participates in the sector-related European social dialogue. Taking the affiliation to a European social partner organisation as a sufficient criterion for determining a national association as a social partner implies that such an association may not at all be involved in industrial relations in its own country. Hence, this selection criterion may look odd at first glance. However, if a national association is a member of a European social partner organisation, it becomes involved in industrial relations matters through its membership in the European organisation. Furthermore, it is important to know whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective country. Affiliation to a European social partner organisation and/or involvement in national

collective bargaining are of the utmost importance to the European social dialogue, since they are the two constituent mechanisms that systematically link the national and European level.

As far as the selection criteria for the European organisations are concerned, the study includes any other sector-related European association which has under its umbrella sector-related national social partner organisations as defined above, in addition to the European social partner organisations. Therefore, the objective to identify the sector-related national and European social partner organisations is both ‘top-down’ and ‘bottom-up’.

Definitions

For the purpose of this study, the gas sector is defined in terms of the classification of economic activities in the European Community (NACE), to ensure the cross-national comparability of the research findings. More specifically, the gas sector is defined as NACE 40.2, that is, the manufacture of gas as well as the distribution of gaseous fuels through mains. The data on the United Kingdom (UK) refer only to offshore gas production and supply, not mainland distribution, except of the employment data provided in Table 1.

The domains of the trade unions and employer organisations and scope of relevant **collective agreements** are likely to vary from this precise NACE demarcation. The study thus includes all trade unions, employer organisations and multi-employer collective agreements which are ‘sector-related’ in terms of any of the following four aspects or patterns:

- congruence – the domain of the organisation or scope of the collective agreement must be identical with the NACE demarcation, as specified above;
- sectionalism – the domain or scope covers only a certain part of the sector, as defined by the aforementioned NACE demarcation, while no group outside the sector is covered;
- overlap – the domain or scope covers the entire sector plus parts of one or more of other sectors. However, it is important to note that the study does not include general associations which do not deal with sector-specific matters;
- sectional overlap – the domain or scope covers part of the sector plus parts of one or more of other sectors.

At European level, the European Commission established a European Social Dialogue Committee for the gas sector in early 2007. The [European Union of the Natural Gas Industry \(Eurogas\)](#), the [European Mine, Chemical and Energy Workers’ Federation \(EMCEF\)](#), and the [European Federation of Public Service Unions \(EPSU\)](#) participate in the sector’s European social dialogue. Thus, affiliation to one of these European organisations is a sufficient criterion for considering a national association as a social partner organisation. However, it is worthwhile noting that the constituent criterion is one of sector-related membership. This is important in the case of EMCEF and EPSU due to their multi-sectoral domain. This study will include only organisations affiliated to EMCEF and EPSU whose domain relates to the gas sector.

Collection of data

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless otherwise cited, this study draws on the country studies provided by the [EIRO national centres](#). It is often difficult to find precise quantitative data. In such cases, rough estimates are provided rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this will be noted.

Quantitative data, as documented in the country studies, stem from three main sources:

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the respective organisation, which are then used for calculating the density rate on the basis of available statistical figures on the potential membership of the organisation;
- personal estimates made by representatives of the respective organisation.

While the data sources of any economic figures cited in the report are generally statistics, the figures relating to the organisations are usually either administrative data or estimates. Furthermore, it should be noted that several country studies also present data on trade unions and business associations that do not meet the above definition of a sector-related social partner organisation, in order to give a complete picture of the sector's associational 'landscape'. It is not always the case that these meet the above definition of a sector-related social partner organisation. For the above substantive reasons, as well as for methodological reasons of cross-national comparability, such trade unions and business associations will not be considered in this report.

Structure of report

The study consists of three main parts, beginning with a brief summary of the economic background of the sector. The report then analyses the social partner organisations in all EU Member States, with the exception of Cyprus, including Bulgaria and Romania, which acceded to the EU on 1 January 2007. In other words, the study covers - 26 European countries. The third part of the study looks at the representative associations at European level. Each section will contain a brief introduction which explains the concept of representativeness in greater detail, followed by the study findings. Because representativeness is a complex issue, it requires separate consideration of national and European levels for two reasons. Firstly, account has to be taken of the method used by national regulations and practices to capture representativeness. Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must thus be suited to this difference.

Finally, it is important to note the difference between the research and political aspects of this study. While it provides data on the representativeness of the organisations under consideration, this report does not reach any definite conclusion on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for admission to the European social dialogue. The reason for this is that defining criteria for sufficient representativeness is a matter for political decision rather than an issue of research analysis.

Economic background

From the late 1990s, the regulatory context of the gas sector has been changing considerably as a direct consequence of Council [Directive 98/30/EC \(196 Kb PDF\)](#) concerning common rules for the internal market in natural gas. This directive was devised to establish a competitive natural gas market as an important element of the completion of the internal energy market in Europe. Concomitant deregulation of market entry and liberalisation of services meant that a sector, which was originally organised as a type of state monopoly in many countries, underwent a major restructuring process. In several cases, this restructuring process was accompanied by full or partial privatisation of the former state-owned suppliers. Nevertheless, these suppliers still have a very strong market position, as is the case of other formerly sheltered sectors whose product markets were deregulated in connection with EU measures to complete the single market.

The findings in Tables 1 and 2 give a general overview of labour market development in the gas sector from the early 1990s to the early 2000s, presenting a number of indicators which are important in terms of industrial relations and social dialogue. In almost all of the Member States, the number of companies increased, reflecting thus the liberalisation of the energy and notably gas market. Available data on the level of total employment and the overall number of **employees** do not show a clear trend, as the number of countries recording a decrease in employment is almost equal to those registering an increase. In the majority of countries, the number of employees comes close to the total level of employment. This finding indicates that the gas sector is generally characterised by relatively large companies as well as by standard employment relationships. Table 1 also shows that the gas sector represents a rather small sector of the European economy: its share in both aggregate employment and overall number of employees is below 1% in the majority of the countries surveyed.

Table 1: Total employment in gas sector, 1993 and 2004

	Number of companies		Total employment		Male employment		Female employment	
	1993	2004	1993	2004	1993	2004	1993	2004
AT	n.a.	37	n.a.	2,957	n.a.	2,409	n.a.	548
BE	1	4	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
BG	1	2	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZ	n.a.	n.a.	4,874	4,707	2,735	2,663	2,138	2,044
DE	n.a.	462 ^a	n.a.	12,000 ^a	n.a.	12,000 ^a	n.a.	0
DK	32	39	1,726	1,728 ^a	1,132	1,159 ^a	594	569 ^a
EE	n.a.	27 ^a	n.a.	400 ^a	n.a.	n.a.	n.a.	n.a.
EL	1	1 ^b	n.a.	1,849 ^b	n.a.	1,849 ^b	n.a.	0
ES	n.a.	51 ^a	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
FI	1	7	48	25	n.a.	18	n.a.	7
FR	n.a.	29	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU	n.a.	33 ^a	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
IE	1	6	750	950	n.a.	660	n.a.	290
IT	401 ^f	475 ^g	29,828 ^f	32,248 ^g	23,600 ^f	25,512 ^g	5,030 ^f	5,437 ^g
LT ^c	n.a.	276	n.a.	29,500	n.a.	23,100	n.a.	6,400
LU ^c	58 ^d	73 ^e	1,406 ^d	1,572 ^e	n.a.	n.a.	n.a.	n.a.
LV	n.a.	1 ^a	n.a.	1,328 ^a	n.a.	n.a.	n.a.	n.a.
MT	1	1	n.a.	116	n.a.	n.a.	n.a.	n.a.
NL ⁱ	130	550 ^b	26,800 ^j	24,000 ^j	n.a.	n.a.	n.a.	n.a.
PL	61	6	42,000	30,000	n.a.	n.a.	n.a.	n.a.
PT ^g	n.a.	n.a.	546 ^f	3,507 ^g	463 ^f	2,857 ^g	83 ^f	650 ^g

	Number of companies		Total employment		Male employment		Female employment	
	1993	2004	1993	2004	1993	2004	1993	2004
RO ^c	245	478	165,000	135,000	128,500	135,000	36,500	35,000
SE	10	4	102	125	n.a.	125	n.a.	17
SI	7 ^d	7 ^a	800 ^d	259 ^a	642 ^d	259 ^a	158 ^d	64 ^a
SK	1	12	n.a.	8,991	n.a.	8,991	n.a.	2,155
UK	n.a.	114 ^h	n.a.	31,500	n.a.	31,500	n.a.	2,465

Notes: n.a. = not available, ^a = 2005, ^b = 2006, ^c = NACE 40 and 41, ^d = 1995, ^e = 2002, ^f = 1991, ^g = 2001, ^h = including oil, ⁱ = NACE 40, ^j = full-time equivalents.

Source: EIRO National centres, 2006

Table 2: Total employees in gas sector, 1993 and 2004

	Total employees		Male employees		Female employees		Total sectoral employees as % of total employment in economy		Total sectoral employees as % of total employees in economy	
	1993	2004	1993	2004	1993	2004	1993	2004	1993	2004
AT	n.a.	2,948	n.a.	2,402	n.a.	546	n.a.	0.08	n.a.	0.09
BE	992	982	825	766	167	216	n.a.	n.a.	0	0
BG	~1,500	~1,900	n.a.	~1,250	n.a.	~650	< 0.1	< 0.1	< 0.1	< 0.1
CZ	4,239	3,890	2,309	2,079	1,929	1,812	0.28	0.25	0.32	0.29
DE	n.a.	18,103 ^a	n.a.	13,336 ^a	n.a.	4,767 ^a	n.a.	< 0.1 ^a	n.a.	0.07 ^a
DK	1,726	1,728 ^a	1,132	1,159 ^a	594	569 ^a	0.07	0.06	0.07	0.07
EE	n.a.	400 ^a	n.a.	n.a.	n.a.	n.a.	n.a.	0.07 ^a	n.a.	0.07 ^a
EL	n.a.	1,849 ^b	n.a.	1,849 ^b	n.a.	0 ^b	n.a.	0.04	n.a.	0.03 ^a
ES	4,154 ^a	5,733 ^a	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0	0
FI	48	19	n.a.	15	n.a.	4	0	0	0	0.10
FR	n.a.	25,547	n.a.	20,054	n.a.	5,493	n.a.	n.a.	n.a.	0.07
HU	11,908	13,392 ^a	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.42	0.48 ^a
IE	n.a.	850	n.a.	n.a.	n.a.	n.a.	n.a.	0.05	n.a.	0.06
IT	29,264 ^f	30,377 ^g	24,100 ^f	25,028 ^g	5,150 ^f	5,349 ^g	0.2 ^f	0.2 ^g	0.3 ^f	0.3 ^g
LT ^c	n.a.	25,633 ^a	n.a.	19,321 ^a	n.a.	6,312 ^a	n.a.	2.1	n.a.	2.6 ^a
LU ^c	1,397 ^d	1,562 ^e	n.a.	n.a.	n.a.	n.a.	0.01 ^d	0.01 ^e	0.01 ^d	0.01 ^e
LV	n.a.	1,306 ^a	n.a.	887 ^a	n.a.	419 ^a	n.a.	0.14 ^a	n.a.	0.14 ^a

	Total employees		Male employees		Female employees		Total sectoral employees as % of total employment in economy		Total sectoral employees as % of total employees in economy	
MT	n.a.	85	n.a.	n.a.	n.a.	n.a.	n.a.	0.08	n.a.	0.07
NLⁱ	23,800 ^{g,j}	19,600 ^j	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.46	n.a.
PL	42,000	30,000	n.a.	n.a.	n.a.	n.a.	0.27	0.22	0.27	0.27
PT^g	510 ^f	3,191 ^g	430 ^f	2,592 ^g	80 ^f	599 ^g	0.01 ^f	0.08 ^g	0.02 ^f	0.08 ^g
RO^c	164,000	132,000	129,000	98,000	36,000	34,000	0.02	0.02	0.04	0.03
SE	102	125	n.a.	83	n.a.	17	n.a.	0	n.a.	0
SI	802 ^d	311 ^a	643 ^d	247 ^a	159 ^d	64 ^a	0 ^d	0 ^a	0 ^d	0 ^a
SK	n.a.	8,980	n.a.	6,825	n.a.	2,155	n.a.	0.45	n.a.	0.47
UK	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Notes: n.a. = not available, ^a = 2005, ^b = 2006, ^c = NACE 40 and 41, ^d = 1995, ^e = 2002, ^f = 1991, ^g = 2001, ^h = including oil, ⁱ = NACE 40, ^j = full-time equivalents.

Source: EIRO National centres, 2006

National level of interest representation

In many of the EU Member States, statutory regulations explicitly refer to the concept of representativeness, when assigning certain rights of interest representation and public governance to trade unions and/or employer organisations. The most important rights addressed by such regulations include: formal recognition as a party to collective bargaining; extension of the scope of a multi-employer collective agreement to employers not affiliated to the signatory employer organisation; and participation in public policy and tripartite bodies of social dialogue. Under these circumstances, representativeness is normally measured by the membership strength of the organisations. For instance, statutory extension provisions usually allow for extending a collective agreement to unaffiliated employers only when the signatory trade union and employer organisation represent 50% or more of the employees within the agreement's domain (see Institut des Sciences du Travail (IST), *Collective agreement extension mechanisms in EU member countries*, Catholic University of Louvain, Typescript, 2001).

As outlined above, the representativeness of the national social partner organisations is pertinent to this study in connection with the capacity of their European umbrella organisations for participation in the European social dialogue. Hence, the role of the national actors in collective bargaining and public policymaking constitutes another important component of representativeness. The effectiveness of the European social dialogue tends to increase with growing ability of the national affiliates of the European organisations to regulate the employment terms and to influence national public policies affecting the sector.

As cross-national comparative analysis shows (see Traxler, F., 'The metamorphoses of corporatism', *European Journal of Political Research*, Vol. 43, No. 4, 2004, pp. 571–598), a generally positive correlation emerges between the bargaining role of the social partners and their involvement in public policy. Social partner organisations that are engaged in multi-employer bargaining are involved in state policies to a significantly greater extent than their counterparts in countries where multi-employer bargaining is lacking. The explanation for this finding is that

only multi-employer agreements matter in macroeconomic terms, setting an incentive for governments to persistently seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective agreements will have a noticeable effect on the economy, due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be absent.

In summary, representativeness is a multi-dimensional concept that embraces three basic elements: 1) the membership domain and membership strength of the social partner organisations; 2) their role in collective bargaining; and 3) their role in public policymaking.

Membership domains and strength

The membership domain of an organisation, as formally established by its constitution or name, demarcates its potential members from other groups which the organisation does not claim to represent. As explained above, this study considers only organisations whose domain relates to the gas sector. For reasons of space, it is impossible to outline in detail the domain demarcations of all of the organisations. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of ‘sector-relatedness’, as specified earlier. Regarding membership strength, a differentiation exists between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as ‘density’, in other words the ratio of actual to potential members.

Furthermore, a difference also arises between trade unions and employer organisations when it comes to measuring membership strength. Trade union membership simply means the number of unionised persons. In addition to taking the total membership of a trade union as an indicator of its strength, it is also reasonable to break down this membership total by sex. However, the case of employer organisations is more complex since they organise collective entities, namely companies that employ employees. Hence, in this instance, two possible measures of membership strength may be used – one referring to the companies themselves, and the other to the employees working in the member companies of an employer organisation.

For a sectoral study such as this, measures of membership strength of both the trade unions and employer organisations have also to take into account how the membership domains relate to the sector. If a domain is not congruent with the sector demarcation, the organisation’s total density – that is density referring to its overall domain – may differ from sector-specific density – that is density referring to the sector. This report will first present the data on the domains and membership strength of the trade unions and will then look at data on the employer organisations.

Trade unions

The trade union data on both the domains and membership strength are shown in Table 3. This table lists all of the trade unions meeting the two criteria for classification of a sector-related social partner organisation, as set out earlier. Estonia is the only EU Member State where no sector-related trade union exists. In all of the other countries, a small number of trade unions – that is 6.0% – have defined their domain in a way which is congruent with the sector definition, such as the Hungarian Federation of Gas Industry Trade Union ([Gázipari Szakszervezeti Szövetség](#), GSS) and the Romanian Federation of Trade Unions in the Gas Sector ([Federatia Sindicatelor ‘Gaz-Romania’](#), [FSGR](#)). This underlines the fact that statistical definitions of business activities, such as the NACE classification, are rather different from the lines along which employees identify common interests and group together in trade unions.

Therefore, trade union domain demarcations in the gas sector most frequently result in overlap or sectional overlap, amounting to 42.2% in each of the two cases. Overlaps arise from fairly

differing modes of domain demarcation, such as general cross-sectoral domains – the [General Workers' Union \(GWU\)](#) of Malta, for example – or various forms of multi-sector domains, covering contiguous sectors, namely the broader energy sector, as does the Belgian Confederation of Christian Trade Unions – Gas and Electricity ([Confédération des Syndicats Chrétiens/Algemeen Christelijk Vakverbond – Gas et Electricité](#), CSC/ACV-G&E) for example. Overlaps in multi-sector domains often occur in combination with other related industries, such as chemicals and mining, including: the Finnish Chemical Workers' Union ([Kemianliitto, CWU](#)); the three Italian trade unions, the Chemicals, Energy and Manufacturing Federation ([Federazione Italiana Lavoratori Chimici Energia Manifatture, Filcem](#)), the Energy, Chemicals and Allied Industries Federation ([Federazione Energia Moda, Chimica e Affini, Femcal](#)) and the Italian Chemicals, Energy and Manufacturing Union ([Unione Italiana Lavoratori Chimica Energia Manifatturiero, Uilcem](#)); and the French Mining and Energy Workers' Federation affiliated to the General Confederation of Labour ([Fédération Nationale des Mines et de l'Énergie–Confédération générale du travail, FNME-CGT](#)).

Sectional overlaps usually stem from domain demarcations which focus on certain categories of employees which are organised across several or all sectors of the economy. Such employee categories are specified according to various parameters, such as high educational and professional qualifications, distinct occupations or employment status. For example, the Danish Confederation of Professional Associations ([Akademikernes Centralorganisation, AC](#)) represents managers, academics and other university graduates in distinct professions, the Danish Union of Electricians ([Dansk EI-Forbund, DEF](#)) groups together workers in electrical trades, and the following three trade unions represent white-collar workers – the Union of Salaried Private Sector Employees, Graphical Workers, Journalists and Paper Workers ([Gewerkschaft der Privatangestellten, Druck, Journalismus und Papier, GPA-DJP](#)) in Austria, the Union of Commercial and Clerical Employees ([Handels og Kontorfunktionærernes Forbund, HK](#)) in Denmark and the Swedish Association for Service and Communication ([Facket för Service och Kommunikation, SEKO](#)).

Reflecting the sector's roots in state-controlled or public-owned undertakings, overlap or sectional overlap also results from the presence of trade unions whose domains include broader areas of the public sector such as, for example, the civil servant's trade union [Abvakabo](#) and the public sector union [CNV Publieke Zaak](#) in the Netherlands and the Swedish Union for Publicly and Privately Employed Salaried Employees ([SKTF](#)) in Sweden. Finally, sectionalism representing 9.6% of the cases relates to the existence of company trade unions in several countries like Greece, Poland, and Slovenia. The former or still existing monopoly structure of the gas sector is an important reason for company unionism.

Table 3: Interest representation of trade unions, 2004–2005

Country	Domain coverage	Membership		Density		Collective bargaining	Consultation	National and European affiliations ^b
		Members	Female membership ^a	Domain	Sector			
AT								
- GPA-DJP	SO	276,000 ^a	42.0%	22.0%	30%	Yes	yes	ÖGB, UNI Europa, EFFAT
- GMTN	SO	236,671 ^a	17.5% ^a	80%	80%	yes	yes	ÖGB, EFFAT, EMF, ETUF-TCL, EMCEF

Country	Domain coverage	Membership		Density		Collective bargaining	Consultation	National and European affiliations ^b
		Members	Female member-ship ^a	Domain	Sector			
- GdC	SO	31,250	13.9%	65%	n.a.	yes	yes	ÖGB, EMCEF
- GdG	SO	163,000 ^a	50.5%	81%	n.a.	yes	yes	ÖGB, EPSU, ETF
BE								
- CSC/ACV-G&E	O ⁺	6,216	n.a.	44%	38%	yes	yes	CSC/ACV, EMCEF*, EPSU*
- CGSP/ACOD-Gas	O ⁺	4,705	n.a.	34%	20%	yes	yes	FGTB/ABVV, EPSU
- CGSLB/ACLVB-G&E	O ⁺	324	n.a.	34%	1.5%	yes	yes	CGSLB/ACLVB, EMCEF*
BG								
- NFL	S	n.a.	33%	n.a.	n.a.	yes	n.a.	CITUB, EMCEF
- NCF	S	n.a.	33%	n.a.	n.a.	yes	n.a.	CL Podkrepa, EMCEF
CZ								
- UNIOS	O ⁺	16,135	45.2%	n.a.	91.9%	yes	no	ČMKOS, EPSU
- OsT	C ⁺	900	n.a.	n.a.	23.1	yes	no	–
DE								
- ver.di	SO ⁺	2,359,392 ^a	n.a.	n.a.	n.a.	yes	yes	DGB, EPSU
- IGBC	SO ⁺	748,852 ^a	n.a.	n.a.	n.a.	yes	yes	DGB, EMCEF
DK								
- Dansk Metal	SO	138,948	5%	80%	85%	yes	yes	LO, EMF, EPSU, EMCEF*
- DEF	SO ⁺	30,016	1%	75%	85%	yes	yes	LO, EMCEF
- 3F	O	350,444	32%	70%–75%	85%	yes	yes	LO, EFBWW, EFFAT, ETF, UNI Europa, EPSU, EMCEF*
- HK	SO ⁺	362,299	74%	45%–50%	65%	yes	yes	LO, DKK, ETF, UNI Europa, EMCEF*
- TL	SO ⁺	30,413	41%	n.a.	80%	yes	yes	UNI Europa,

Country	Domain coverage	Membership		Density		Collective bargaining	Consultation	National and European affiliations ^b
		Members	Female membership ^a	Domain	Sector			
								EPSU
- AC	SO	165,905	42%	99%	99%	yes	yes	Eurocadres, EPSU*, EMF*
EE								
-	-	-	-	-	-	-	-	-
EL								
- SEDEPA	S	339	28.6%	100%	100%	yes	no	EMCEF*
ES								
- FIA-UGT	O ⁺	n.a.	n.a.	n.a.	10.5	yes	n.a.	UGT, EMCEF
- FITEQA-CC.OO	O ⁺	n.a.	n.a.	n.a.	n.a.	yes	n.a.	CC.OO, EMCEF
- FESIQ-CGT	O ⁺	n.a.	n.a.	n.a.	n.a.	yes	n.a.	n.a.
- ELA-STV-Gas	S ⁺	86	n.a.	n.a.	n.a.	yes	n.a.	ELA-STV, EMCEF, EPSU
FI								
- CWU	O ⁺	48,760	52.0	88.0	100.0	yes	yes	SAK, EMCEF, ETUF-TCL
- TU	SO ⁺	125,722	45.5	79.0	70.0	yes	yes	STTK, EMCEF, UNI, EFBWW, EMF, EFFAT, ETF
FR								
- FCE-CFDT	O ⁺	62,000	26.0	n.a.	n.a.	yes	yes	CFPT, EMCEF
- FNME-CGT	O ⁺	71,809	21.0	n.a.	n.a.	yes	yes	CGT, EMCEF, EPSU
- FNEM	O ⁺	n.a.	n.a.	n.a.	n.a.	yes	yes	CGT-FO, EMCEF, EPSU
- UNSPIEG	O ⁺	n.a.	n.a.	n.a.	n.a.	yes	n.a.	CFTC, EMCEF*, EPSU*
- FIEG	SO ⁺	n.a.	n.a.	n.a.	n.a.	yes	yes	CFE-CGC, CEC
HU								
- GSS	C	3,055	n.a.	n.a.	n.a.	yes	yes	ASZSV,

Country	Domain coverage	Membership		Density		Collective bargaining	Consultation	National and European affiliations ^b
		Members	Female membership ^a	Domain	Sector			
								EMCEF*
- MOL BS	SO	1,800	n.a.	n.a.	n.a.	yes	yes	MSZOSZ
IE								
- SIPTU	O ⁺	200,000	n.a.	90%	53%	yes	yes	ICTU, EPSU, EMCEF
- Amicus	O ⁺	52,590	n.a.	75%	18%	yes	yes	ICTU
- ATGWU	O ⁺	42,122	n.a.	90%	5%	yes	yes	ICTU, EPSU
- TEEU	SO ⁺	37,025	n.a.	90%	9%	yes	yes	ICTU
IT								
- FILCEM	O ⁺	165,869	10%–15%	21%	26%	yes	no	CGIL, EPSU, EMCEF
- FEMCA	O ⁺	134,621	25%–30%	8%	12%	yes	no	CISL, EPSU, EMCEF, ETUF
- UILCEM	O ⁺	78,500	10	10%	12% ^b	yes	no	UIL, EMCEF, EPSU
LT								
- LCPDPSF	O ⁺	3,000	50%	30%	10%	yes***	no	LPSK
- LD-TUs	C ⁺	n.a.	n.a.	n.a.	n.a.	yes	no	n.a.
- LVPPF	SO ⁺	3,000	25%	~ 40%	8%	yes***	no	LPSK, EPSU
LU								
- SSE	O ⁺	3,000	n.a.	n.a.	6.4%	yes	no	OGB-L, EPSU*, EMCEF*
- LCGB	O ⁺	n.a.	n.a.	n.a.	n.a.	yes	yes	EPSU, EMCEF
LV								
- LAKRS	O	16,059	45.8%	64%	39%	yes	yes	LBAS, EPSU, EFFAT
MT								
- GWU	O ⁺	n.a.	n.a.	n.a.	99%	yes	yes	EMCEF, ETF, EFFAT, EPSU, EMF, ETUF-TCL, UNI, EURO-WEA, FERPA
- EPOU	SO ⁺	n.a.	n.a.	n.a.	85%	yes	yes	–

Country	Domain coverage	Membership		Density		Collective bargaining	Consultation	National and European affiliations ^b
		Members	Female member-ship ^a	Domain	Sector			
NL								
- Abvakabo	O ⁺	365,000	51%	25%	n.a.	yes	no	<i>FNV</i> , EPSU
- CNV Publieke Zaak	O ⁺	79,000	33.33%	n.a.	n.a.	yes	no	<i>CNV</i> , EPSU
- VMHP-N	SO ⁺	n.a.	n.a.	n.a.	n.a.	yes	no	<i>MHP</i> , Eurocadres*
- FNV-BG	O ⁺	465,144	21%	n.a.	n.a.	yes	no	<i>FNV</i> , EMCEF, EPSU
- CNV Bedrijvenbond	O ⁺	90,000	n.a.	n.a.	n.a.	yes	no	<i>CNV</i> , EMCEF
- VHP-G ⁺	S ⁺	n.a.	n.a.	n.a.	n.a.	yes	no	–
- De Unie	SO	100,000	n.a.	n.a.	n.a.	yes	no	–
PL								
- PZZ Kadra	O ⁺	1,000	n.a.	n.a.	n.a.	yes	no	<i>Federation of Trade Unions</i> , EMCEF
- SGiE	O ⁺	8,370	n.a.	n.a.	n.a.	yes	no	<i>NSZZ Solidarnosc</i> , EMCEF
- FZZGNiG	O ⁺	8,000	n.a.	n.a.	n.a.	yes	no	<i>OPZZ</i> , EMCEF
- ZZP PGNiG S.A.	S ⁺	500	n.a.	n.a.	n.a.	yes	no	–
PT								
- SINQUIFA	SO ⁺	8,268 ^a	30% ^a	16.1% ^a	6.3%	yes	no	<i>CGTP</i> , EMF*
- SINORQUIFA	SO ⁺	4,336 ^a	19% ^a	8.5%	0.4%	yes	no	<i>CGTP</i> , EMF*
- SIESI	SO ⁺	n.a.	n.a.	n.a.	1.1%	yes	no	<i>CGTP</i>
- SINDEL	O ⁺	9,200	33%	n.a.	0.1%	yes	no	<i>UGT</i> , EMCEF, EPSU
- SINDEQ	O ⁺	7,000	n.a.	13.7%	0.1%	yes	no	<i>UGT</i> , EMCEF
- SITESE	SO ⁺	11,000	n.a.	n.a.	0.4%	yes	no	<i>UGT</i> , UNI
RO								

Country	Domain coverage	Membership		Density		Collective bargaining	Consultation	National and European affiliations ^b
		Members	Female membership ^a	Domain	Sector			
- FSGR	C ⁺	25,000	28%	95%	n.a.	yes	no	<i>CNSLR, EMCEF, EPSU</i>
- FSGMM	S ⁺	1,000	n.a.	n.a.	n.a.	yes	no	<i>BNS, EPSU</i>
SE								
- CF	SO ⁺	120,000	29%	n.a.	40%	yes	no	<i>EMCEF</i>
- SEKO	SO ⁺	149,000	30%	n.a.	9%	yes	no	<i>EMCEF, EPSU</i>
- SKTF	SO ⁺	170,000	75%	n.a.	5%	yes	no	<i>EPSU, Eurocadres</i>
- SIF	SO ⁺	355,000	38%	n.a.	27%	yes	yes ⁺⁺	<i>TCO, Eurocadres, EMCEF</i>
SI								
- SDE	O ⁺	7,443	17%	n.a.	11.0	yes ^{***}	no	<i>ZSSS, EPSU, EMCEF</i>
- SDP	S ⁺	90	n.a.	70%	n.a.	yes	no	<i>SDE, ZSSS</i>
SK								
- POZ	C	3,463	30%	38.6%	38.6%	no	yes ⁺⁺	<i>KOZ SR, EPSU</i>
UK								
- Amicus	SO ⁺	1,200,000 ^a	n.a.	n.a.	13%	yes	yes	<i>TUC, EPSU, EMCEF</i>
- TGWU	SO ⁺	800,000	n.a.	66%	n.a.	yes	yes	<i>TUC, EPSU, EMCEF</i>
- Balpa	SO	9,000	< 1%	95%	n.a.	yes	yes	<i>TUC</i>
- RMT	SO	75,000	n.a.	n.a.	n.a.	yes	yes	<i>TUC</i>
- Numast	SO	19,000	1.5%	75%	n.a.	yes	yes	<i>TUC</i>
- GMB	SO ⁺	650,000	40%	n.a.	n.a.	yes	yes	<i>TUC, EPSU, EMCEF</i>
- OILC	SO	1,200	n.a.	n.a.	n.a.	yes	yes	—
- Prospect	SO	102,000	2%	n.a.	n.a.	no	n.a.	<i>EPSU</i>
- Unison	O ⁺	1,400,000	70%	n.a.	n.a.	yes	yes	<i>TUC, EPSU</i>

Notes: See Annex for list of abbreviations and full names of organisations.

*n.a. = not available, * = indirect affiliation via higher-order national organisation or affiliates, ** = national affiliations in italics, only cross-sectoral (i.e. peak-level) organisations are listed, and for the European level sector-related organisations only, *** = indirect involvement via lower-level affiliates.*

+ = domain overlap, ++ = indirect consultation via peak organisation.

^a = 2006, ^b = figure probably inflated.

O = overlap, SO = sectional overlap, S = sectionalism, C = congruence

Source: EIRO National centres, 2006

As the domains of the trade unions often overlap with the demarcation of the sector, they also overlap with one another in most countries. The results in Table 3 also illustrate these inter-union domain overlaps, which may be considered as endemic. In the majority of countries, the domain of any sector-related trade union overlaps with the domain of all of the other unions in the sector. Depending on the scale of mutual overlap, this results in competition between the trade unions for members.

Looking at the membership data of the trade unions, the proportion of female members appears to be notably less than that of male members in most of the unions for which membership figures by sex are available (Table 3). However, a few of the trade unions show a female membership rate exceeding 50%. Such findings are surprising and do not reflect the sector's gender composition, as the majority of employees working in the gas sector are men in almost all of the countries (Table 1). When analysing these findings, it appears that the domain of all of the trade unions recording a majority of female members is overlapping or partly overlapping in relation to the sector demarcation. Hence, the predominance of female members in these trade unions is likely to originate in areas of their domains other than the gas sector.

Membership is usually voluntary in the trade unions. However, all of the Irish trade unions in the gas sector, with the exception of Amicus, can rely on closed shop arrangements, stipulating that employees, if covered by certain pay grades, must be unionised.

The absolute numbers of the trade union members differ widely. Their records range from more than two million members to fewer than one hundred members. This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain, rather than in the trade unions' ability to attract members. Therefore, density is a more appropriate measure of membership strength for a comparative analysis. Domain density is 50% or higher in the case of 57% of the trade unions which document figures on density (Table 3). Almost half of all the unions – that is 45.7% – gather 70% or more of the employees within their domain while only 11.4% of the trade unions organise fewer than 15% of the employees within their domain. Most of the remaining trade unions – that is 31.4% – record a density of in between 15% and 49% of their potential members. Overall, domain density is rather high.

When comparing the density ratio referring to the trade unions' domain on aggregate with that referring to the gas sector, it tends to be lower in the gas sector. Sectoral density stands at 70% or higher in the case of 27.3% of the trade unions for which data are available, and 4.6% of trade unions document densities ranging from 50% to 70%. Some 45.5% of the trade unions show a sectoral density below 15%, while 22.7% of the unions represent in between 15% and 49% of the sector's employees. The lower sectoral density relative to the aggregate density is also evident in those trade unions for which figures on both measures are recorded. In most of these cases, sectoral density is more or less below the density on aggregate, although a significant number of trade unions also show the reverse relationship between the two densities. Taking the sector's small size into consideration, these findings imply that the gas sector is usually not trade unions'

membership stronghold, neither in absolute nor in relative terms. However, anecdotal evidence from the country reports suggests that unionisation rates are rather high in the former monopoly suppliers and in those companies that were or still are owned by the state. In comparison with many other sectors of the economy, the gas sector's trade unions seem to be very strong, as the very high levels of collective bargaining coverage also indicate (see below). This strength results from two main sources. On the one hand, the gas sector like the energy sector in general provides other industries as well as households with a key resource – a fact that makes strikes very effective. On the other hand, widespread public ownership of the sector's companies has been favourable to unionisation.

Employer organisations

Table 4 presents the membership data on employer organisations. For 16 out of the 26 countries surveyed **employer organisations** are documented. Since 2004, however, this number has declined, because the Romanian **Oil and Gas Employer Federation** (FFPG) has lost its status as an employer organisation. It is also worth noting that in two of these countries, namely Spain and Hungary, the listed employer organisations do not partake in collective bargaining. In this study, they are classified as social partner organisations only due to their European-level affiliation to **Eurogas**. This means that half of the 26 countries surveyed have employer organisations engaged in collective bargaining. However, 11 countries do not register any employer organisation that meets the definition of a social partner organisation, as mentioned earlier. This situation does not mean that business has remained unorganised. In general, business interest organisations may also deal with interests other than those related to industrial relations. Organisations specialised in matters other than industrial relations are commonly classified as trade associations (see **TN0311101S**). Such sector-related trade associations also exist in the gas sector. As far as their national scope of activities is concerned, all of the employer organisations which, according to Table 4, are not involved in collective bargaining primarily or exclusively act as trade associations in their country. It is only the conceptual decision to include all associational affiliates to **Eurogas** regardless of a role in national bargaining which gives these associations the status of a social partner organisation within the framework of this study. Of the 31 employer organisations listed in Table 4, seven organisations belong to this group.

Table 4: Domain coverage, membership and density of employer organisations, 2004–2005

Country	Domain coverage	Membership			Density			
		Type ^a	Companies	Employees	Companies		Employees	
					Domain	Sector	Domain	Sector
AT								
- FVMI	SO ⁺	oblig.	24 ^a	3,911 ^a	100%	n.a.	100%	n.a.
- FGW	S ⁺	oblig.	427	4,393	100%	n.a.	100%	n.a.
BE								
- FEBEG	O ⁺	vol.	20	14,681	100%	100%	100%	100%
- Synergrid	O ⁺	vol.	31	n.a.	100%	100%	100%	100%
BG	–	–	–	–	–	–	–	–

Country	Domain coverage	Membership			Density			
		Type ^a	Companies	Employees	Companies		Employees	
					Domain	Sector	Domain	Sector
CZ								
- ČPU	S	vol.	10	n.a.	n.a.	n.a.	n.a.	n.a.
DE								
- VAEU	SO ⁺	vol.	361 ^a	139,027 ^a	n.a.	n.a.	n.a.	n.a.
- VKA	SO ⁺	vol.	n.a.	2,000,000	n.a.	n.a.	n.a.	n.a.
- BGW	O ⁺	vol.	1,300	n.a.	n.a.	n.a.	n.a.	n.a.
DK								
- DI	O ⁺	vol.	7,000	370,000	n.a.	n.a.	70%	17%
- KL	SO ⁺	vol.	98 ^c	472,000	100%	100%	100%	100%
EE	-	-	-	-	-	-	-	-
EL	-	-	-	-	-	-	-	-
ES								
- SEDIGAS	O	vol.	49	n.a.	96.1%	96.1%	n.a.	n.a.
FI								
- CIF	O	vol.	375	32,750	40%	43%	80%	79%
FR								
- UNEMIG	S ⁺	vol.	20	23,000	100%	n.a.	100%	n.a.
- UFE	SO ⁺	vol.	n.a.	n.a.	100%	n.a.	100.0%	n.a.
- AFG	S	vol.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU								
- GE	S	vol.	7	5,272	19%	18%	81.5%	39.4%
IE	-	-	-	-	-	-	-	-
IT								
- ANIGAS	C ⁺	vol.	92	9,060	19%	19%	30%	30%
- ASSOGAS	C ⁺	vol.	98	3,000	21%	21%	10%	10%
- FEDERES=TRATTIVA	C ⁺	vol.	20	5,000	4%	4%	16%	16%
- FEDER=UTILITY	SO ⁺	vol.	522	45,000	26%	41%	39%	43%
LT	-	-	-	-	-	-	-	-

Country	Domain coverage	Membership			Density			
		Type ^a	Companies	Employees	Companies		Employees	
					Domain	Sector	Domain	Sector
LU	–	–	–	–	–	–	–	–
LV	–	–	–	–	–	–	–	–
MT								
- GRTU	SO	vol.	31	24	100%	100%	100%	100%
NL								
- WENb	O ⁺	vol.	52-55	24,500	n.a.	80%–90%	n.a.	~ 90%
- EnergieNad	O ⁺	vol.	29	n.a.	98%	98%	~ 100%	~ 100%
PL	–	–	–	–	–	–	–	–
PT	–	–	–	–	–	–	–	–
RO								
- FPPGb	O	vol.	95	70,000	70%	n.a.	80%	n.a.
SE								
- EFA+	SO	vol.	141	18,914	n.a.	50%	n.a.	69%
- KFS+	SO	vol.	550	31,000	n.a.	25%	n.a.	13%
- SGF	SO	vol.	100	n.a.	n.a.	100%	n.a.	100%
SI								
- ZDS	O ⁺	vol.	1,347	204,658	n.a.	28.5	n.a.	90.6%
- GZS	O ⁺	oblig.	n.a.	n.a.	100%	100%	100%	100%
SK	–	–	–	–	–	–	–	–
UK								
- COTA	S	vol.	4	3,000	n.a.	n.a.	n.a.	1.2%
- UKDCA	SO	vol.	9	6,500	n.a.	n.a.	n.a.	5%

Notes: See Annex for list of abbreviations and full names of organisations.

O = overlap, S = sectionalism, SO = sectional overlap, n.a. = not available, oblig. = obligatory membership, vol. = voluntary membership.

^a = 2006, ^b = until 2006, ^c = municipalities.

* = only sector-related European organisations listed, + = domain overlap, ++ = member companies jointly conduct collective bargaining.

Source: EIRO national centres, 2006

Table 5: Collective bargaining, consultation and national/European affiliations of employer organisations, 2004–2005

Country	Collective bargaining	Consultation	National and European affiliations ^a
AT			
- FVMI	voluntary	voluntary	<i>WKÖ</i>
- FGW	voluntary	voluntary	<i>WKÖ</i> , Euroheat & Power, Eurogas
BE			
- FEBEG	voluntary	voluntary	<i>VBO/FEB</i>
- Synergrid	obligatory	n.a.	<i>VBO/FEB</i> , Eurogas
BG	–	–	–
CZ			
- ČPU	voluntary	obligatory	Eurogas
DE			
- VAEU	voluntary	obligatory	<i>BDA</i>
- VKA	voluntary	obligatory	–
- BGW	obligatory	voluntary	Eurogas
DK			
- DI	voluntary	obligatory	<i>DA</i>
- KL	voluntary	obligatory	CEEP, CEMR, UCLG, ALDA
EE	–	–	–
EL	–	–	–
ES			
- SEDIGAS	obligatory	n.a.	Eurogas, Marcogaz
FI			

Country	Collective bargaining	Consultation	National and European affiliations ^a
- CIF	voluntary	voluntary	<i>EK, CEFIC</i>
FR			
- UNEMIG	voluntary	n.a.	–
- UFE	voluntary	voluntary	–
- AFG	obligatory	n.a.	Eurogas
HU			
- GE	obligatory ⁺⁺	voluntary	Eurogas, GEODE, Marcogaz
IE	–	–	–
IT			
- ANIGAS	voluntary	obligatory	<i>Confindustria, Eurogas</i>
- ASSOGAS	voluntary	obligatory	<i>Confindustria, Eurogas</i>
- FEDERES= TRATTIVA	voluntary	obligatory	<i>Confindustria, Eurogas</i>
- FEDER= UTILITY	voluntary	obligatory	<i>Confservizi, EUREAU, CEDEC</i>
LT	–	–	–
LU	–	–	–
LV	–	–	–
MT			
- GRTU	voluntary	n.a.	–
NL			
- WENb	voluntary	obligatory	<i>AWVN, VNO-NCW, Eurelectric</i>
- EnergieNad	obligatory	voluntary	<i>VNO-NCW, Eurogas, Eurelectric, Euro Heat & Power</i>
PL	–	–	–
PT	–	–	–
RO			
- FPPG ^b	voluntary ^b	obligatory	<i>CPISC, ACPR</i>

Country	Collective bargaining	Consultation	National and European affiliations ^a
SE			
- EFA ⁺	voluntary	obligatory	–
- KFS ⁺	voluntary	obligatory	CEEP
- SGF	obligatory	voluntary	Eurogas, ENGVA, AEGPL
SI			
- ZDS	voluntary	obligatory	–
- GZS	voluntary	obligatory	EICTA
SK	–	–	–
UK			
- COTA	voluntary	voluntary	–
- UKDCA	voluntary	voluntary	–

Notes: See Annex for list of abbreviations and full names of organisations; national affiliations in italics.

O = overlap, S = sectionalism, SO = sectional overlap, n.a. = not available.

^a = 2006, ^b = until 2006, ^c = municipalities.

* = only sector-related European organisations listed, + = domain overlap, ++ = member companies jointly conduct collective bargaining.

Source: EIRO national centres, 2006

In one third of the countries where employer associations exist, only one single employer organisation is established. Pluralist associational systems are thus far less frequent on the employer side than on the side of labour. Regardless of this, the domains of employer organisations tend to be defined in a narrower sense than those of the trade unions, with 32.3% and 35.5% of these organisations showing overlapping domains and partly overlapping domains, respectively. The domains of the two Slovenian employer organisations – namely, the Chamber of Commerce and Industry of Slovenia ([Gospodarska zbornica Slovenije, GZS](#)) and the Slovenian Employers' Association ([Združenje delodajalcev Slovenije, ZDS](#)) – are cross-sectoral. Alternatively, domain overlaps often result from the fact that employer organisations cover the energy sector as a whole or certain parts of it, such as the electricity subsector. Domain overlaps of this type can be found in Belgium, France and the Netherlands. The Chemical Industry Federation of Finland ([Kemianteollisuus, CIE](#)) covers the chemicals industry as well as the gas sector. Sectionalism or sectional overlaps, which occur in the case of broader domain demarcation in terms of the sector classification, are mainly due to the specific organisation of gas extraction and gas distribution on the one hand, such as in Austria and the Czech Republic, and the separate organisation of private and public companies on the other, such as in Denmark, France and Germany. In all, 22.6% of employer organisations are sectionalists with regard to their domain while 9.7% of the organisations have a domain congruent with the sector definition. Three employer organisations rely on obligatory membership due to their public-law status as chambers of commerce: the Austrian Petroleum Industry Association ([Fachverband der Mineralölindustrie, FVMI](#)) and the Association of Gas and District Heating Supply Companies ([Fachverband der](#)

[Gas- und Wärmeversorgungsunternehmen, FGW](#)), as well as the Slovenian GZS. However, due to recent legislation GZS must become a voluntary employer organisation within the next three years.

As regards the two chamber organisations, the density is, by law, 100% in terms of both companies and employees. Nevertheless, density is also very high in most voluntary employer organisations, with the notable exception of the UK organisations. A relatively high density in organisations with voluntary membership is particularly true in terms of the density of employees covered. Some 73.3% of employer organisations for which related data are available cover at least 70% of the employees relative to their domain, and 52.6% of organisations do so relative to the sector. The comparable figures for density in terms of companies are 57.1% and 43.8%, respectively. In most of these cases, density amounts to 100%. Overall, sectoral density in terms of employees is not lower than domain density, which is in direct contrast with the trade union density levels. One reason for this is that the domain of the employer organisations is more tailored to the sector demarcation. The fact that density in terms of companies tends to be lower than density in terms of employees indicates that the tendency of companies to associate increases with company size.

Collective bargaining and its actors

Table 3 lists all of the trade unions engaged in sector-related collective bargaining, while Tables 4 and 5 show the corresponding data for employer organisations. Despite the numerous cases of inter-union domain overlapping in countries characterised by a multi-union situation, there are relatively few cases of inter-union competition for bargaining rights. In Portugal, such competition is present in the form of two valid collective agreements covering the sector, one signed by the Federation of Metalworking, Mining, Chemical, Pharmaceutical, Petroleum and Gas Workers' Unions ([Federação Federação Intersindical da Metalúrgia, Minas, Química, Farmacêutica, Petróleo e Gaz, Fequimetal](#)) and the other one by several sector-related trade unions affiliated to the General Workers' Union ([União Geral de Trabalhadores, UGT](#)). Inter-union competition over bargaining rights is also reported for Sweden. In the UK, rivalries exist between trade unions with overlapping domains, which nevertheless bargain jointly with different employer representatives.

Unlike the unions, no competition over collective bargaining rights is documented with regard to the employer organisations. This may change in Slovenia, since GZS has to shift from obligatory to voluntary membership within one year following the parliament's adoption of the new Law on Chambers of Commerce and Industry ([SI0606019I](#)) in May 2006. This may unleash competition among Slovenian employer organisations in the gas sector for members and representational rights. Overall, the gas sector's bargaining system is not beset with problems of inter-associational rivalries.

Table 6 provides an overview of the system of sector-related collective bargaining in the 26 countries under consideration. The standard measure of the importance of collective bargaining as a means of employment regulation calculates the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (see Traxler, F., Blaschke, S. and Kittel, B., *National labour relations in internationalised markets*, Oxford University Press, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

To delineate the bargaining system, two further indicators are used. The first indicator refers to the relevance of multi-employer bargaining, compared with single-employer bargaining. Multi-employer bargaining is defined as being conducted by an employer organisation on behalf of the

employer side. In the case of single-employer bargaining, the company or its subunits are the party to the agreement. This includes cases where two or more companies jointly negotiate an agreement. The relative importance of multi-employer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore indicates the impact of the employer organisations on the overall process of collective bargaining.

The second indicator considers whether statutory extension schemes are applied to the sector. For reasons of brevity, this analysis is confined to extension schemes designed to extend the scope of a collective agreement to employers not affiliated to the signatory employer organisation; extension regulations targeting the employees are thus not included in this study. Regulations concerning the employees are not significant to this analysis for two reasons. Firstly, extending a collective agreement to employees who are not unionised in the company covered by the collective agreement is a standard of the [International Labour Organization \(ILO\)](#), aside from any national legislation. Secondly, employers have good reason to extend a collective agreement concluded by themselves, even when they are not formally obliged to do so. Otherwise, their workforce may become motivated to unionise.

In comparison with employee-related extension procedures, schemes that target employers are far more important to the strength of collective bargaining in general and of multi-employer bargaining in particular. This is because employers are capable of refraining from both joining an employer organisation and also from entering single-employer bargaining in the context of a purely voluntary system. Therefore, employer-related extension practices increase the coverage of multi-employer bargaining. Moreover, when it is pervasive, an extension agreement may encourage employers to join the controlling employer organisation; such a move, in turn, enables them to participate in the bargaining process and to benefit from the organisation's related services in a situation when the respective collective agreement will bind them regardless (see Traxler, F., Blaschke, S. and Kittel, B., 2001).

Since extension schemes can be applied only to multi-employer agreements, the widespread practice of single-employer bargaining limits their use even in cases where labour law provides for such schemes. Pervasive extension practices of multi-employer agreements have been reported for Belgium, Finland, France and Romania, while such practices are rather limited in the Czech Republic. When referring to the aim of extension provisions, that is making multi-employer agreements generally binding, one should also mention the provisions for obligatory membership in the Chambers of Commerce and Industry in Austria and Slovenia. These chambers also create an extension effect, since they are parties to multi-employer bargaining in their respective country. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. The labour court rulings relate this principle to the multi-employer agreements, such that they are seen as being generally binding (see IST, 2001).

Table 6: System of sectoral collective bargaining, 2004–2005

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) as % of total CBC	Extension practices
AT	100%	60%	(pervasive)
BE	100%	100%	pervasive
BG	30%	0%	none
CZ	100%	100%	limited

Country	Collective bargaining coverage (CBC)	Proportion of multi-employer bargaining (MEB) as % of total CBC	Extension practices
DE	>90%	n.a.	none
DK	85%	100%	none
EE	0%	–	none
EL	100%	0%	none
ES	90%	0%	none
FI	100%	100%	pervasive
FR	100%	83.6%	pervasive
HU	41%	50%	none
IE	83%	0%	none
IT	100%	100%	(pervasive)
LT	100%	0%	none
LU	6.7%	0%	none
LV	100%	0%	none
MT	>72%	0%	none
NL	~ 92% ^b	~ 94.5% ^b	none
PL	80%	0%	none
PT	11%	0%	none
RO	80%–90%	100%	pervasive
SE	100%	100%	none
SI	100%	MEB prevailing	(pervasive)
SK	99%–100%	0%	none
UK	70% ^a	SEB prevailing	none

Notes: Collective bargaining coverage means employees covered as a percentage of the total number of employees in the sector. Multi-employer bargaining is noted relative to single-employer bargaining (SEB). Extension practices include functional equivalents to extension provisions, namely obligatory membership and labour court rulings; cases of functional equivalents appear in parentheses.

^a = offshore only, ^b = energy sector.

Source: EIRO national centres, 2006

Collective bargaining coverage

In terms of the gas sector's collective bargaining coverage, 19 of the 26 countries for which national figures are documented register a very high coverage rate of 80% or more of employees. In this respect, Estonia is the most notable exception in that collective bargaining is completely

absent in the Estonian gas sector due to a lack of sector-related trade union organisations. In four of the countries surveyed, namely Bulgaria, Hungary, Luxembourg and Portugal, the coverage rate is below 50%. In Romania, the future of collective bargaining remains uncertain, after the sector's employer organisations lost their bargaining mandate in 2004.

Depending on national circumstances, a combination of factors account for the generally high coverage rates: namely, multi-employer bargaining coincides with a high density of trade unions and/or employer organisations, as is the case in Denmark and the Netherlands. Belgium, France and Finland are countries with a high bargaining coverage backed by both high density rates and pervasive extension practices. In the case of Austria and Slovenia, obligatory membership in the employer organisations works as a functional equivalent to pervasive extension. While bargaining coverage is generally very high in countries with prevalent multi-employer bargaining, a greater variance exists across countries operating under single-employer bargaining. In such circumstances, bargaining coverage ranges from 6.7% as seen in Luxembourg to 100% as seen in Greece. Overall bargaining coverage in systems of single-employer bargaining is contingent on trade union density which interacts with the economic concentration of a sector. Unionisation generally increases with company size (see Visser, J., 'Trends in trade union membership', in *OECD Employment Outlook 1991*, Paris, Organisation for Economic Cooperation and Development (OECD), 1991). The relatively high economic concentration of the gas sector in terms of employment therefore contributes to both unionisation and collective bargaining coverage; it also explains why bargaining coverage is very high in countries with predominant single-employer bargaining.

Overall, the relative importance of multi-employer bargaining can be roughly estimated in all of the countries surveyed, with the exception of Germany. Multi-employer bargaining prevails in 11 countries, including Romania, compared with the 12 countries characterised by predominant single-employer bargaining. In Hungary, multi and single-employer bargaining account for approximately the same proportion of employees covered. It should be noted, however, that multi-employer bargaining does not mean sector-level bargaining in all of these cases. In Slovenia, for instance, the gas sector is covered by an all-encompassing central collective agreement. Furthermore, multi-employer bargaining is often supplemented by company bargaining.

In Germany, besides the multi-employer agreements and single-employer agreements, a hybrid form of collective agreement exists which is almost unique. In the case of the following energy supply companies, [RWE](#), [E.On Ruhrgas](#) and [Vattenfall](#) and their subsidiaries, the respective collective agreements are concluded between the employer organisation and a trade union. While these collective agreements could be defined as company agreements, a representative of the United Services Union ([Vereinte Dienstleistungsgewerkschaft](#), [ver.di](#)) believes that these agreements are sectoral collective agreements. The trade union representative argues that they cover a wide range of local and regional subsidiaries including some companies formerly owned by local municipalities.

No data are available on the number of employees covered by either single-employer agreements or multi-employer agreements. In Germany, it is to be assumed that the number of employees covered by either single-employer agreements or the [RWE](#), [E.On Ruhrgas](#) or [Vattenfall](#) collective agreements is greater than the number of employees covered by the traditional form of multi-employer agreements.

Participation in public policymaking

Interest associations may partake in public policy in two basic ways: they may be consulted by the authorities in matters affecting their members; or they may be represented on 'corporatist', in

other words tripartite, committees and boards of policy concertation. This study considers only cases of consultation and corporatist participation that are suited to sector-specific matters. Consultation processes are not necessarily institutionalised, meaning that the organisations consulted by the authorities may vary according to the issues being addressed and over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on an occasional rather than a regular basis. Given this volatility, Tables 3–5 designate only those sector-related trade unions and employer organisations that are usually consulted.

Trade unions

The system of reiterated consultation applies to trade unions in the vast majority of countries for which data are available: some 14 out of the 23 countries surveyed report regular consultation processes with trade unions. Since a multi-union system is established in almost all of the countries, it is possible that the authorities may prefer to consult certain trade unions or that the unions compete for participation rights. However, in most countries where a noticeable practice of consultation is found, any of the existing trade unions can take part in the consultation processes. Therefore, inter-union conflicts over participation in public policy are not a prominent issue.

Employer organisation

Due to their monopoly-like position in many countries, any conflict over participation rights is absent in the case of the sector-related employer organisations. In nine of the 15 countries, for which data are available, employer organisations have regular access to consultation in sector-related matters. In the multi-associational system of Germany, the Netherlands and Sweden, not all of the system's associations are consulted. In most countries where employer organisations co-exist with trade unions, consultation rights are equally weighted for the two sides of industry. Of the 14 countries for which information on consultation is reported for organised business and labour, representatives of both sides of industry partake in consultation procedures in eight countries, while neither side participates in four countries. Asymmetrical consultation practices are established in Denmark and the Netherlands. In those countries where no employer organisations are considered to be a social partner organisation in the sense of the aforementioned definition, business is not necessarily excluded from consultation procedures. Under these circumstances, sectoral trade associations may be consulted. In Germany, the Netherlands and Sweden, only those associations that qualify as a social partner organisation due to their affiliation to Eurogas are consulted on behalf of business. Otherwise, they would belong to the group of trade associations only. This finding suggests that consultation in the gas sector deals with product market interests rather than labour market interests. In addition to the various business associations, large companies may directly be involved in consultation procedures, in particular when policymaking follows the pattern of a 'company state' rather than that of an 'associative state' (see Grant, W., *Business and politics in Britain*, London, Macmillan, 1987).

Tripartite participation

Turning from consultation to tripartite participation, the research reveals that genuinely sector-specific tripartite bodies are established in only a few of the countries, namely Austria, Belgium, France, Portugal, Romania and Slovenia. Hence, Table 7 which summarises the main properties of the active tripartite boards of public policy also includes those bodies specialised in the energy sector. All of these tripartite committees are statutory bodies, with the exception of the Slovenian [Economic Social Committee for Energy](#) which exists on the basis of a bipartite social partner agreement. Most of these bodies concentrate on product market regulation, with the aim of

supporting efforts to liberalise the sector. Only the tripartite boards of Romania and Slovenia also focus on labour market issues. With regard to the composition of these bodies, cross-sectoral peak organisations often participate instead of or together with sector-related associations on both sides of industry. The strong presence of peak organisations underlines the product-market focus of these boards. It is an important task of these tripartite bodies to reconcile the sector's companies' interests with those of their customers, including industrial consumers of other sectors of the economy. As a consequence, associations representing various consumer groups are also members of the tripartite board in Belgium and Portugal. In France and Portugal, company representatives are appointed to the board in addition to representatives of the sector's organisations.

Table 7: Tripartite sector-specific boards of public policy

Country	Name of body and scope of activity	Origin	Participants	
			Trade unions	Business associations
AT	Gas advisory committee on any matters of gas	Statutory	ÖGB	WKÖ
BE	Commission for the regulation of electricity and gas*	Statutory	CSC/ACV, FGTB/ABVV, CGSLB/ACLVB plus consumer organisations	FEB/VBO, UNIZO, FEBEG, INTERREGIES, INTERMIXT, FEBELIEC
FR	Higher Energy Council on any matter of energy	Statutory	FNME-CGT, FCE-CFDT, FNEM-FO, FIEG-CFE-CGC	UFE, other business associations and company representatives
PT	Advisory board on the regulation of the energy sector	Statutory	CGTP, UGT plus other associations, companies and consumer organisations	CIP, CCP, CAP, CTP
RO	Social dialogue committee	Statutory	FSGR, FSGMM	FPPG
SI	Economic Social Committee for Energy dealing with the sector's labour market issues	Agreement	SDE, SPES	GZS, ZDS

*Notes: * Including boards which also cover (other parts of) the energy sector. See Annex for list of abbreviations and full names of organisations.*

Source: EIRO National centres, 2006

European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria, as defined by the Commission. Accordingly, a social partner organisation must have the following attributes:

- be cross-industry, or relate to specific sectors or categories and be organised at European level;
- consist of organisations that are themselves an integral and recognised part of Member States' social partner structures, which have a capacity to negotiate agreements and which are representative of all Member States, as far as possible;
- have adequate structures to ensure the effective participation in the consultation process.

In terms of social dialogue, the constituent property of these structures is the ability of an organisation to negotiate on behalf of its members and to conclude binding agreements. In light of this, the following section on the European organisations of the gas sector will analyse the organisations' membership domain, the composition of their membership and their ability to negotiate.

Membership domain

As already mentioned, this study focuses on the [European Mine Chemical and Energy Workers' Federation \(EMCEF\)](#), [European Federation of Public Service Unions \(EPSU\)](#) and Eurogas in the course of its 'top-down' review of the European-level social partner organisations. 'Bottom-up' information on other European associations is derived from the European affiliations of the sector's national industrial relations actors.

According to its constitution, the membership domain of EMCEF comprises workers in sectors such as: mining, mineral oil, gas, energy, chemicals, pharmaceuticals, rubber, plastics, glass, ceramics, cement, quarries, pulp, paper, waste disposal, environmental and other related industries. EPSU embraces national, regional and local government bodies, as well as related international organisations and public undertakings engaged in the following fields: production, distribution and supply of electricity, gas and water; health, environmental and social services; and educational, cultural and recreational services. As a result, the domain of EMCEF overlaps relative to the sector, while the domain of EPSU overlaps in terms of a section. The domain of Eurogas largely corresponds with the sector's demarcation, as this organisation represents the natural gas industry. Eurogas is based on a dual structure of membership in that it organises both business associations and companies.

Membership composition

In terms of the membership composition of EMCEF, EPSU and Eurogas, it should be noted that these organisations also cover countries other than the 26 EU Member States examined in this study. However, this report only looks at the membership composition of the 26 countries under examination, of which Estonia lacks any sector-level social partner organisation. Furthermore, the overview will be limited to those organisations affiliated to EMCEF and EPSU whose domain is related to the gas sector insofar as these organisations gather employees of the gas sector as members.

Table 8 lists the members of EMCEF and shows that in five countries, namely the Czech Republic, Estonia, Lithuania, Latvia and Slovakia, no national trade unions are affiliated to EMCEF. In many of the countries surveyed, several trade unions are members of EMCEF. Overall, EMCEF has 42 direct trade union affiliations from the 26 EU Member States surveyed. EPSU members from these countries are shown in Table 9. EPSU has 38 trade union affiliations from 20 countries. Between them, EMCEF and EPSU cover all of the 26 countries, with the exception of Estonia where no gas sector-related trade union is established. Around 74% of the trade unions listed in Table 3 are affiliated to EMCEF and/or EPSU. As far as available data on trade union membership provide sufficient information on the unions' relative strength in their country, it appears that EMCEF and EPSU cover the sector's most important labour representatives. However, some exceptions exist where important national sector-related trade unions are not covered at European level, including trade unions in Austria, Hungary, Ireland, Lithuania, the Netherlands and Portugal. Nonetheless, other important sector-related trade unions of these countries are represented at European level. All sector-related members of EMCEF are involved in collective bargaining, which is also the case of all sector-related EPSU members, with the exception of its Slovakian member, the Gas Industry Trade Union Association ([Plynárenský odborový zväz](#), POZ). This means that neither EMCEF nor EPSU have a sector-related member engaged in collective bargaining in Slovakia.

Table 8: Members of EMCEF, 2006^a

Country	Members
AT	GMTN*, GdC*
BE	CSC/ACV MECC (CSC/ACV-G&E)*, CGSLB/ACLVB (CGSLB/ACLVB -G&E*)
BG	NFL*, NCF*
CZ	—
DE	IGBCE*
DK	DEF*, CO Industri (Dansk Metal*, HK*, 3F*)
EE	—
EL	PFEPPCI (SEDEPA)*
ES	FIA-UGT*, FITEQA-CCOO*, ELA-STV*
FI	TU*, CWU*
FR	FCE-CFDT*, FNME-CGT*, FNEM-FO*, CMTE-CFTC (UNSPIEG)*
HU	VDSZ (GSS)*
IE	SIPTU*
IT	UILCEM*, FEMCA-CISL*, FILCEM-CGIL*
LT	—
LU	OGB-L (SSE)*, LCGB*
LV	—

Country	Members
MT	GWU*
NL	FNV-BG*, CNV Bedrijvenbond*
PL	SGiE*, FZZGNiG*, PZZ Kadra*
PT	SINDEL*, SINDEQ*
RO	FSGR*
SE	CF*, SEKO*, SIF*
SI	SDE*
SK	—
UK	GMB*, TGWU*, Amicus*

Notes: ^a List is confined to the sector-related trade unions of the 26 countries under examination. See Annex for list of abbreviations and full names of organisations.

* Involvement in sector-related collective bargaining.

** Associations in brackets are sector-related trade unions listed in Table 3 which are indirectly affiliated to EMCEF via national higher-order organisations.

Source: EIRO national centres, 2006

Table 9: Members of EPSU, 2006^a

Country	Members
AT	GdG*
BE	GNC-CNE (CSC/ADV-G&E)*, CGSP/ACOD-G*
BG	—
CZ	UNIOS*
DE	ver.di*
DK	Dansk Metal*, 3F*, TL*, DJØF (AC*)
EE	—
EL	—
ES	ELA-STV*
FI	—
FR	FNME-CGT*, FNEM-FO*, CMTE-CFTC (UNSPIEG)*
HU	—
IE	SIPTU*, ATGWU*
IT	FILCEM-CGIL*, FEMCA-CISL*, UILCEM*
LT	LVPPF*

Country	Members
LU	CGTL (SSE)*, LCGB*
LV	LAKRS*
MT	GWU*
NL	Abvakabo*, FNV-BG*, CNV Publieke Zaak*
PL	—
PT	SINDEL*
RO	FSGR*, FSGMM*
SE	SEKO*, SKTF*
SI	SDE*
SK	POZ
UK	GMB*, TGWU*, Amicus*, UNISON*, PROSPECT

Notes: ^a List is confined to the sector-related trade unions of the 26 countries under examination. See Annex for list of abbreviations and full names of organisations.

* Involvement in sector-related collective bargaining.

** Associations in brackets are sector-related trade unions listed in Table 3 which are indirectly affiliated to EPSU via national higher-order organisations.

Source: EIRO national centres, 2006

Table 10 lists the members of Eurogas. Of the 26 countries examined in this study, Eurogas has 21 countries under its umbrella through either associational members or company members from these countries. The five following countries – Bulgaria, Estonia, Lithuania, Latvia, Malta, and Romania – do not have any member affiliated to Eurogas. In terms of the type of membership, 11 countries – Denmark, Finland, Greece, Ireland, Italy, Luxembourg, Poland, Portugal, Slovenia, Slovakia and the UK – are covered exclusively via affiliated companies, while three countries – the Czech Republic, Hungary and Sweden – are linked to Eurogas through associations only. In the remaining six countries of this study – Austria, Belgium, France, Germany, the Netherlands and Spain – both companies and associations are covered by Eurogas.

Such a membership structure raises the question of how Eurogas relates to the aforementioned Commission criterion of representativeness. The latter requires European associations to cover organisations which are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements. In this respect, Eurogas lacks membership in Hungary, since neither an employer organisation engaged in collective bargaining nor any companies are affiliated. A problem of representativeness arises in countries where no employer organisation with a bargaining mandate is affiliated to Eurogas, while collective bargaining in these countries occurs predominantly or exclusively at multi-employer level. This situation applies to Belgium, Denmark, Finland, France, Italy, the Netherlands, Romania, Sweden and Slovenia. In this context, Eurogas members may have a role in industrial relations only when signing supplementary company agreements or when being affiliated to a national employer organisation, such that the organisation's goal formation and bargaining strategies can be influenced. If single-employer bargaining prevails, the question is whether the bargaining companies are members of Eurogas. Leaving aside those countries that are not covered by Eurogas, this involves the following seven countries – Greece, Ireland, Poland, Portugal and

Slovakia. In these countries, the key bargainers are under the umbrella of Eurogas, while in Luxembourg only one of the bargaining companies is a member of Eurogas, and for Spain no information on this question is available.

Table 10: Members of Eurogas, 2006^a

Country	Members	
	Associations	Companies
AT	FGW*	OMV
BE	Synergrid	Electrabel, Distrigas, CREG
BG	—	—
CZ	ČPU*	—
DE	BGW	E.ON, VNG, WINGAS
DK	—	DONG, HNG
EE	—	—
EL	—	DEPA
ES	SEDIGAS	GasNatural
FI	—	Gasum
FR	AFG	GDF
HU	GE	—
IE	—	BGE
IT	—	ENI
LT	—	—
LU	—	SOTEG
LV	—	—
MT	—	—
NL	EnergieNed	Gasunie Trade & Supply
PL	—	PGNiG ^a
PT	—	Galp Energia
RO	—	—
SE	SGF	—
SI	—	Geoplin
SK	—	SPP
UK	—	BP, Centrica

Notes: ^a List is confined to the sector-related trade unions of the 26 countries under examination. See Annex for list of abbreviations and full names of organisations.

* Involvement in sector-related collective bargaining.

** Associated member.

Source: EIRO national centres, 2006

Capacity to negotiate

The third criterion of representativeness at the European level relates to the ability of organisations to negotiate on behalf of their own members. EMCEF, EPSU, and Eurogas are mandated by their member organisations to negotiate in European social dialogue matters. In order to evaluate the weight of EMCEF, EPSU and Eurogas in European social dialogue, other European organisations that may be representative bodies of the sector will also have to be considered. Following a 'bottom-up' approach, this can be achieved by reviewing the European organisations to which the sector-related trade unions and employer organisations are affiliated.

In relation to the trade unions, these affiliations are listed in Table 3. The findings show that European organisations other than EMCEF and EPSU represent only a small number of both sector-related trade unions and countries. They include the following organisations: [European Metalworkers' Federation \(EMF\)](#) and [UNI Europa](#), each of which has seven affiliations covering seven countries; the [European Federation of Trade Unions in Food, Agriculture and Tourism \(EFFAT\)](#), with six affiliations from five countries; the [European Transport Workers' Federation \(ETF\)](#), with five affiliations covering four countries; the [European Trade Union Committee for Textiles, Clothing and Leather \(ETUF-TCL\)](#), with four affiliations from four countries; the [Council of European Professional and Managerial Staff \(Eurocadres\)](#), with four affiliations covering three countries; the [European Federation of Building and Woodworkers \(EFBWW\)](#), with two affiliations from two countries; and the [European Regional Organisation of the International Federation of Workers' Education Associations \(EURO-WEA\)](#) and the [European Federation of Retired and elderly People \(Fédération Européenne des Retraités et des Personnes âgées, FERPA\)](#), each of which has one affiliation. Although the list of affiliations in Table 3 may be incomplete, this review underlines the status of EMCEF and EPSU as the sector's main labour representatives, all the more since many of the above affiliations to other European organisations reflect the overlapping domains of the affiliates rather than a real reference of the affiliations as such to the gas sector.

An overview of the European membership of employer organisations can be derived from Table 4. It shows that organisational links of the sector-related employer organisations with European federations other than Eurogas are rather rare and highly diversified. Such affiliations involve 14 European federations and only four of these federations record more than one company affiliation: the international association for district heating, district cooling and combined heat and power, [Euroheat & Power](#), the [European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest \(CEEP\)](#) and the technical association of the European natural gas industry, [Marcogaz](#), each of which have two affiliations from two countries. The association of the electricity industry in Europe, [Eurelectric](#), has two affiliations from one country. Hence, Eurogas is obviously the most important voice of business in the gas sector.

Commentary

Like other sectors that were sheltered from competition in product markets, the gas sector has been undergoing major economic restructuring in the wake of measures devised to make the internal market complete. Unlike other previously sheltered sectors, economic restructuring in the

gas sector did not trigger dramatic changes in the national industrial relations systems. Only two country studies report major alterations with rather contrasting implications for organised industrial relations. In Italy, market liberalisation led to a more homogenous associational system as a result of mergers on both sides of industry. Market liberalisation also homogenised the bargaining system in that one single collective agreement, first signed in 2002, replaced the fragmented bargaining system that had existed until that time. In Romania, two major companies left the sector's employer organisation, FPPG, following their privatisation. As a consequence of this, FPPG lost its status as a representative association and, concomitantly, its right to conclude collective agreements. Hence, multi-employer bargaining has faded away.

The fact that the sector's national industrial relations systems have proved stable despite profound economic changes reflects their extraordinary organisational strength. As outlined above, union density is very high. The same can be said about employer organisations where they exist. The sector's organisational strength is also evident from the comparatively high level of collective bargaining coverage. A comparison with recent figures on cross-sectoral collective bargaining coverage in the EU25 Member States (see Marginson, P., Traxler, F., 'After enlargement: preconditions and prospects for bargaining coordination', *Transfer*, Vol. 11, 2005, pp. 423–438) indicates that the gas sector's bargaining coverage is more or less higher in 16 out of the 20 countries for which comparable data are available. Only in Estonia, Luxembourg and Portugal, the sector's bargaining coverage is lower than that of cross-sectoral bargaining.

As already mentioned, organisational strength stems from the sector's profile as a supplier of energy, often in combination with public ownership. Strong unionisation in connection with the existence of large companies has paved the way for single-employer bargaining in many countries. In this context, employers have refrained from setting up employer organisations equipped with a bargaining mandate. In a number of countries, however, multi-employer bargaining, conducted by employer organisations, prevails. Overall, almost as many countries operate under predominant multi-employer bargaining as countries with prevalent single-employer bargaining. This 'dual' bargaining structure of the sector makes it difficult to form a coherent structure for representing the sector's employers at European level. Regardless of this, Eurogas is certainly the most relevant EU-wide representative organisation of the sector's employers. With regard to labour representation, the sector's bargaining structure is also 'dual' in that unionisation relates to either sector-related demarcations or public ownership. This gives rise to the existence of two important EU-wide labour representative organisations: EMCEF and EPSU. Both are unmatched as the European spokespersons of the gas sector's employees, as no other European organisation exists which can compare with them in terms of organising relevant sector-related trade unions across the European Member States.

Annex: List of abbreviations

Country	Abbreviation	Full name
Austria (AT)	FGW	Association of Gas and District Heating Supply Companies
	FVMI	Austrian Petroleum Industry Association
	GdC	Union of Chemical Workers
	GdG	Municipal Employees' Union

	GMTN	Metalworking, Textiles, Agriculture and Food-processing Union
	GPA-DJP	Union of Salaried Private Sector Employees, Graphical Workers, Journalists and Paper Workers
	ÖGB	Austrian Federation of Trade Unions
	OMV	Leading Oil and Gas Group in Central Europe
	WKÖ	Chamber of the Economy
Belgium (BE)	CGSLB/ACLVB	Federation of Liberal Trade Unions of Belgium
	CGSLB/ACLVB-G&E	Federation of Liberal Trade Unions of Belgium – Gas and Electricity
	CGSP/ACOD-G	General Public Service Federation - Gas
	CSC/ACV	Confederation of Christian Trade Unions
	CSC/ACV-G&E	Confederation of Christian Trade Unions – Gas and Electricity
	CSC/ACV MECC	Confederation of Christian Trade Unions – Energie Chemie
	CNE-GNC	Centrale Nationale des Employés-Groupement National des Cadres
	CREG	Commission for the Regulation of Electricity and Gas
	FEB/VBO	Belgian Federation of Employers
	FEBEG	Belgian Federation of Electricity and Gas Enterprises
	FEBELIEC	Federation of Belgian Large Industrial Energy Consumers
	FGTB/ABVV	Belgian General Confederation of Labour
	INTERMIXT	Federation of Municipal Mixed-economy Enterprises
	INTERREGIES	Association of Public Enterprises for Distribution regarding Electricity, Gas and Telecommunications
	Synergrid	Belgium Federation of Electricity and Gas Operators
	UNIZO	Organisation of the Self-Employed

Bulgaria (BG)	CITUB	Confederation of Independent Trade Unions in Bulgaria
	CL Podkrepa	Confederation of Labour Podkrepa
	NCF	National Chemistry Federation
	NFL	National Federation of Labour
Czech Republic (CZ)	ČMKOS	Czech-Moravian Confederation of Trade Unions
	ČPU	Czech Gas Union
	OsT	Trade Union Transgas
	UNIOS	Trade Union UNIOS
Denmark (DK)	3F	United Federation of Danish Workers
	AC	Confederations of Professional Associations
	CO-Industri	Central Organisation of Industrial Employees
	DA	Confederation of Danish Employers
	Dansk Metal	Danish Metalworkers' Union
	DEF	Danish Union of Electricians
	DI	Confederation of Danish Industries
	DKK	Danish Municipal Employees Confederation
	DONG	DONG Energy
	HK	Union of Commercial and Clerical Employees in Denmark
	HNG	HNG Midt-Nord Salg
	KL	Local Government Denmark
	LO	Danish Confederation of Trade Unions
	TL	Danish Association of Professional Technicians
Estonia (EE)	–	–
Finland (FI)	CIF	Chemical Industry Federation of Finland

	CWU	Chemical Workers' Union
	EK	Confederation of Finnish Industries
	Gasum	Gasum Energy Services
	SAK	Central Organisation of Finnish Trade Unions
	STTK	Finnish Confederation of Salaried Employees
	TU	Union of Salaried Employees
<hr/>		
France (FR)	AFG	French Gas Industry Employers' Association
	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CFTC	French Christian Workers' Confederation
	CMTE-CFTC	Chemical, Mining, Textiles and Energy Workers' Federation - French Christian Workers' Confederation
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – <i>Force ouvrière</i>
	FCE-CFDT	Chemical and Energy Workers' Federation – French Democratic Confederation of Labour
	FIEG	Electricity and Gas Workers' Federation
	FIEG-CFE-CGC	Electricity and Gas Workers' Federation – French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	FNEM	Energy and Mining Workers' Federation
	FNEM-FO	Energy and Mining Workers' Federation – <i>Force ouvrière</i>
	FNME-CGT	Mining and Energy Workers' Federation – General Confederation of Labour
	GDF	Gaz de France
	UFE	French Electricity Industry Employers' Association

	UNEMIG	National Gas Industry Employers' Association
	UNSPIEG	National Union of Electricity and Gas Workers' Branches
Germany (DE)	BDA	German Employers' Confederation
	BGW	Bundesverband der deutschen Gas- und Wasserwirtschaft e.V.
	DGB	Confederation of German Trade Unions
	E.ON	E.ON Ruhrgas
	IGBCE	Mining, Chemicals and Energy Industrial Union
	VAEU	Vereinigung der Arbeitgeberverbände energie- und versorgungswirtschaftlicher Unternehmungen
	ver.di	United Services Union
	VKA	Vereinigung kommunaler Arbeitgeberverbände
	VNG	Verbundnetz Gas
	WINGAS	Joint venture of Wintershall Holding AG in Kassel, the largest German producer of oil and natural gas, and the Russian company OAO Gazprom
Greece (EL)	DEPA	Public Gas Corporation
	SEDEPA	Union of DEPA Employees
Hungary (HU)	ASZSV	Alliance of Autonomous Trade Unions
	GE	Association of Gas Distribution Companies
	GSS	Federation of Gas Industry Trade Union
	MOL BS	MOL Mineworkers Union
	MSZOSZ	National Association of Hungarian Trade Unions
	VDSZ	Federation of Trade Unions of the Chemical, Energy and Allied Workers
Ireland (IE)	Amicus	Amicus the Union Ireland
	ATGWU	Amalgamated Trade and General Workers Union

	BGE	Bord Gais Eireann
	ICTU	Irish Congress of Trade Unions
	SIPTU	Services Industrial Professional and Technical Union
	TEEU	Technical, Engineering and Electrical Union
Italy (IT)	ANIGAS	National Association of Gas Operators
	ASSOGAS	National Association of Private Employers of Gas and Auxiliary Services
	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers' Unions
	Confindustria	General Confederation of Italian Industry
	Confservizi	Services Confederation
	ENI	Integrated Energy Company
	FEDERESTRATTIVA	Italian Extractive Industry Federation
	FEDERUTILITY	Federation of Energy and Water Companies
	FEMCA	Energy, Chemicals and Allied Industries Federation
	FEMCA-CISL	Energy, Chemicals and Allied Industries Federation – Italian Confederation of Workers' Unions
	FILCEM	Italian Chemicals, Energy and Manufacturing Federation
	FILCEM-CGIL	Italian Chemicals, Energy and Manufacturing Federation – General Confederation of Italian Workers
	UILCEM	Italian Chemicals, Energy and Manufacturing Union
	UIL	Union of Italian Workers
Latvia (LV)	LAKRS	Latvian Trade Union of Public Service Employees
	LBAS	Free Trade Union Confederation of Latvia
Lithuania (LT)	LCPDPSF	Lithuanian Chemical Industrial Workers Trade Union Federation

	LD-TUs	Lithuanian Gas – Trade Unions
	LPSK	Lithuanian Trade Union Confederation
	LVPPF	Lithuanian Service Workers Trade Union
Luxembourg (LU)	CGTL	General Confederation of Labour Luxembourg
	LCGB	Luxembourg Christian Trade Union Confederation
	OGB-L	Luxembourg Confederation of Independent Trade Unions
	SOTEG	Société de Transport de Gaz, Soteg S.A.
	SSE	SSE Transco Limited
Malta (MT)	EPOU	Enemalta Professional Officers Union
	GRTU	General Retailers and Traders Union
	GWU	General Worker's Union
Netherlands (NL)	Abvakabo	Public Service Workers' Union
	AWVN	General Industrial Employers' Association
	CNV	National Federation of Christian Trade Unions
	De Unie	General Independent Union
	EnergieNed	Federation of Energy Companies in the Netherlands
	FNV	Dutch Trade Union Federation
	FNV-BG	FNV Allied Industry, Food, Services and Transport Unions
	Gasunie Trade and Supply	Trading company Gasunie Trade and Supply, to be renamed GasTerra
	MHP	Federal Union for Intermediate and Higher Personnel
	VHP-G	Union for Managerial and Executive Staff in the Gas Sector
	VMHP-N	Small union for intermediate and higher personnel in the utilities sector, the datatransmission sector and the environmental sector – Vereniging voor Middelbaar en hoger Personeel in de Nutssector
	VNO-NCW	Confederation of Netherlands Industry and Employers

	WENb	Employers' Organisation for Energy and Utilities companies - Werkgeversvereniging Energie- en Nutsbedrijven
Poland (PL)	FZZGNiG	Federation of Oil and Gas Extraction Trade Unions
	NSZZ Solidarnosc	NSZZ Solidarity
	OPZZ	All Poland Alliance of Trade Unions
	PGNiG	Polish Oil and Gas Company
	PZZ Kadra	Kadra Trade Union Association, National Oil and Gas Extraction Section
	SGiE	National Secretariat of Mine and Energy Worker's Union
	ZZP PGNiG S.A.	PGNiG S.A. Employee Union
Portugal (PT)	CAP	Confederation of Portuguese Farmers
	CCP	Commerce and Services Employers
	CGTP	General Portuguese Workers' Confederation
	CIP	Confederation of Portuguese Industry
	CTP	Confederation of Portuguese Tourism
	FEQUIMETAL	Federation of Metalworking, Mining, Chemical, Pharmaceutical, Petroleum and Gas Workers' Unions
	Galp Energia	Petróleos e Gás de Portugal SGPS, S.A.
	SIESI	Union of Workers in the Electrical Industries in Southern Portugal and Islands
	SINDEL	National Industry and Energy Union
	SINDEQ	Democratic Union in Energy, Chemical, Textiles and Other Industries
	SINORQUIFA	Union of Workers in the Chemical, Pharmaceutical, Petrol, and Gas Industries in Northern Portugal
	SINQUIFA	Union of Workers in the Chemical, Pharmaceutical, Petrol, and Gas Industries in Central and Southern Portugal and Islands

	SITese	Union of Service Workers and Technicians
	UGT	General Workers' Union
Romania (RO)	ACPR	Alliance of Employers' Confederations of Romania
	BNS	National Trade Union Bloc
	CNSLR	National Confederation of Free Trade Unions in Romania Brotherhood
	CPISC	National Employer Confederation of Industries, Services and Commerce
	FPPG	Oil and Gas Employers' Federation
	FSGMM	Methane Gas Mediaş Federation of Trade Unions
	FSGR	Federation of Trade Unions in the Gas Sector
Spain (ES)	CC.OO	Trade Union Confederation of Workers' Commissions
	ELA-STV	Basque Workers' Union
	FESIQ-CGT	Federation of Trade Unions of the Chemical Industries of the General Confederation of Labour
	FIA-UGT	Federation of Similar Industries of the General Workers' Confederation
	FITEQA-CC.OO	Federation of Chemicals and Similar of the Trade Union Confederation of Workers' Commissions
	GasNatural	GasNatural Spain
	SEDIGAS	Spanish Gas Association
	UGT	General Workers' Confederation
Sweden (SE)	CF	Swedish Association of Graduate Engineers
	EFA	Employer Association of Energy Companies
	KFS	Employers' Organisation for Companies in the Municipal and County Council Sector
	SEKO	Swedish Association for Service and Communication

	SGF	Svenska Gas Föreningen
	SIF	Swedish Union for Technical and Clerical Employees
	SKTF	Swedish Union for Publicly and Privately Employed Salaried Employees
	TCO	Swedish Confederation for Professional Employees
Slovenia (SI)	Geoplin	Geoplin d.o.o.Ljubljana
	GZS	Chamber of Commerce and Industry of Slovenia
	SDE	Trade Union of Workers in the Energy sector
	SDP	Trade Union of Plinarna Maribor
	SPES	Trade Union of Production of Energy Materials
	ZDS	Association of Employers of Slovenia
	ZSSS	Association of Free Trade Unions of Slovenia
Slovakia (SK)	KOZ SR	Central Confederation of Trade Unions
	POZ	Gas Industry Trade Union Association
	SPP	Slovak Gas Industry
United Kingdom (UK)	Amicus	Amicus the Union United Kingdom
	Balpa	British Airline Pilots' Association
	BP	BP plc
	Centrica	Centrica plc
	COTA	Caterers' Offshore Traders Association
	GMB	General and Municipal Boilermakers' Union
	Numast	National Union of Maritime, Aviation and Shipping Transport
	OILC	Offshore Industry Liaison Committee
	Prospect	Engineers, Scientists, Managers and Specialists' Union
	RMT	Rail, Maritime and Transport Workers' Union

TGWU	Transport and General Workers' Union
TUC	Trades Union Congress
UKDCA	UK Drilling Contractors' Association
Unison	Public Service Workers' Union

Europe	AEGPL	European Liquefied Petroleum Gas Association
	ALDA	Association of the Local Democratic Agencies
	CEC	European Confederation of Executives and Managerial Staff
	CEDEC	European Federation of Local Energy Companies
	CEEP	European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest
	CEFIC	European Chemical Industry Council
	CEMR	Council of European Municipalities and Regions
	EFBWW	European Federation of Building and Wood Workers
	EFFAT	European Federation of Trade Unions in Food, Agriculture and Tourism
	EICTA	European Information, Communications and Consumer Electronics Industry Technology Association
	EMCEF	European Mine, Chemical and Energy Workers' Federation
	EMF	European Metalworker's Federation
	ENGVA	European Natural Gas Vehicle Association
	EPSU	European Federation of Public Service Unions
	ETF	European Transport Workers' Federation
	ETUF-TCL	European Trade Union Federation : Textiles, Clothing, Leather
	EUREAU	European Union of National Associations of Water Suppliers and Waste Water Services
	Eurelectric	Association of the Electricity Industry in Europe

EURO-WEA	European Workers' Education Associations
Eurocadres	ETUC Council of European Professional and Managerial Staff
Eurogas	European Union of the Natural Gas Industry
Euroheat and Power	International Association for District Heating, District Cooling and Combined Heat and Power
FERPA	Federation of Europe Retired Personnel Association
GEODE	European Group of the Organisation of Independent Gas Suppliers
Marcogaz (MG)	Technical Association of the European Natural Gas Industry
UCLG	United Cities and Local Governments

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