

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Electricity sector



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Contents

Introduction.....	1
0.1. Objectives of the study	1
0.2. Historical background on European sectoral social dialogue in the electricity sector.....	2
0.3. Definitions and methodology.....	4
0.4. Data collection	7
0.5. Quality control measures	8
0.6. Structure of the report.....	8
1. Economic background and employment trends	10
1.1. Employment in the electricity sector	10
1.2. Characteristics of employers in the electricity sector	17
1.3. Industrial relations	25
1.4. Impact of the COVID-19 pandemic	26
1.5. Digitalisation	27
1.6. A just transition to clean energy	27
2. National level of representation	29
2.1. Coverage, sector-relatedness and organisational density of trade unions.....	30
2.2. Coverage, sector-relatedness and organisational density of employer organisations	48
2.3. Collective bargaining patterns and social dialogue practices	59
2.4. Participation in public policy	60
2.5. Fragmentation and pluralism in the electricity sector	68
3. European level of interest representation	71
3.1. Membership domain of EPSU	71
3.2. Membership domain of IndustriAll Europe.....	75
3.3. Comparative analysis of the representativeness of EPSU and IndustriAll Europe	78
3.4. National trade unions not represented in the ESSDC	81
3.5. Other European-level trade union organisations.....	84
3.6. Membership domain of Eurelectric	87
3.7. National employer organisations not represented in the ESSDC.....	91
3.8. Other European-level employer organisations	94
3.9. Capacity to negotiate and represent all affiliated organisations	97
3.10. Effective participation in ESSDC meetings	101
Conclusions.....	103
Bibliography	106
Annex 1: National-level organisations	108
Annex 2: The electricity sector in the UK	114
Annex 3: Additional information about the sector	116
Annex 4: Network of Eurofound Correspondents	123

List of tables

Table 1: Organisations currently represented in the electricity ESSDC	3
Table 2: Demarcation of the electricity sector based on NACE code 35.1	4
Table 3: Membership domain patterns of an organisation	6
Table 4: Numbers of enterprises, workers and employees in the electricity sector in the EU27, 2018	13
Table 5: Shares of men and women workers in NACE 35 in the EU27, 2009–2019 (%)	15
Table 6: Number of enterprises in NACE 35.1 in the EU27, 2008–2018	17
Table 7: The largest 14 companies in the electricity sector in the EU, 2018/2019	22
Table 8: Share of the workforce employed by the largest companies in the sector, 2019/2020	23
Table 9: Types of collective bargaining in the largest companies and proportion of the workforce covered, 2019/2020	25
Table 10: Number of electricity sector-related organisations per country	29
Table 11: Trade union coverage of parts of the sector and involvement in collective bargaining	31
Table 12: Breadth of trade union coverage of the sector (0–4 sectors)	31
Table 13: Membership domain patterns of trade unions in the electricity sector	32
Table 14: Sector coverage of trade unions in the electricity sector	36
Table 15: Organisational density of trade unions in the electricity sector	43
Table 16: Involvement of trade unions in the electricity sector in collective bargaining	44
Table 17: Employer organisation coverage of parts of the sector and involvement in collective bargaining	48
Table 18: Breadth of employer organisation coverage of the sector (0–4 sectors)	48
Table 19: Sector coverage of employer organisations/business associations in the electricity sector	50
Table 20: Membership domain patterns of employer organisations/business associations in the electricity sector	53
Table 21: Organisational density of employer organisations in the electricity sector	55
Table 22: Involvement of the national employer organisations in collective bargaining	56
Table 23: Collective bargaining in the electricity sector in the EU (number and share of organisations)	59
Table 24: Type of collective bargaining in the electricity sector by Member State	60
Table 25: Collective bargaining coverage by Member State	60
Table 26: Consultation of employers and trade unions by Member State	62
Table 27: Tripartite and bipartite social dialogue bodies in which sector-related issues are dealt with or in which sector-related social partners are involved	63
Table 28: Reasons for fragmentation and pluralism of trade unions in the electricity sector	68
Table 29: Reasons for fragmentation and pluralism of employer organisations in the electricity sector	70
Table 30: Sector coverage of EPSU affiliates	73
Table 31: Sector coverage of IndustriAll Europe affiliates	76
Table 32: European-level affiliations of the largest and second largest electricity trade unions	78
Table 33: Comparative analysis of the representativeness of the European-level trade union organisations with members in the electricity sector	79
Table 34: Characteristics of trade unions not represented in the ESSDC	82

Table 35: Other European and international associations to which national trade unions in the electricity sector are affiliated	84
Table 36: Sector coverage of Eurelectric affiliates	89
Table 37: European-level affiliations of the largest and second largest electricity employer organisations.....	91
Table 38: Characteristics of employer organisations not represented in the ESSDC	92
Table 39: Other EU-level associations to which national employer organisations/business associations in the electricity sector are affiliated	94
Table 40: Joint texts agreed by the representative European social partners for the electricity sector	99
Table 41: Effective participation in the ESSDC for the electricity sector, 2018–2019.....	101
Table 42: National trade unions active in the electricity sector	108
Table 43: National employer organisations active in the electricity sector	112
Table 44: National trade unions in the UK.....	114
Table 45: National employer organisations in the UK	114
Table 46: Sector-related trade unions affiliated to EPSU in the UK	114
Table 47: Sector-related trade unions affiliated to EPSU in the UK: coverage and rankings	114
Table 48: Sector-related trade unions affiliated to IndustriAll Europe in the UK.....	115
Table 49: Sector-related trade unions affiliated to IndustriAll Europe in the UK: coverage and rankings.....	115
Table 50: Sector-related employer associations affiliated to Eurelectric in the UK	115
Table 51: Sector-related employer associations affiliated to Eurelectric in the UK: coverage and rankings.....	115
Table 52: Employees in NACE 35.1 and share of employment at national and EU27 levels, 2018	116
Table 53: Number of employees in companies in NACE 35.1, by size, EU27, 2011–2017	117
Table 54: Are the largest and second largest national-level trade unions affiliated to EPSU or IndustriAll Europe?	117
Table 55: Are the largest and second largest national-level employer organisations affiliated to Eurelectric?	119
Table 56: Examples of national companies indirectly affiliated to Eurelectric through national employer organisations (non-exhaustive list)	121
Table 57: National correspondents who contributed to this report	123

List of figures

Figure 1: Main topics covered by electricity ESSDC joint texts	3
Figure 2: Number of joint texts agreed by the electricity ESSDC, 2000–2021	4
Figure 3: The electricity sector activities covered by the report	5
Figure 4: Four different types of sector-relatedness	6
Figure 5: Workforce in the energy sectors, including gas and electricity (NACE 35), in the EU27, 2009–2019 (thousands of people)	10
Figure 6: Absolute change (thousands of employees) and relative change (%) in the NACE 35.1 workforce, 2009–2019	11
Figure 7: Shares of employment in parts of NACE 35.1 in the EU27, 2020	14
Figure 8: Shares of socioeconomic groups in NACE 35 in the EU27, 2011–2020 (%)	16
Figure 9: Employment and enterprises in NACE 35.1 in the EU27 by size class, 2018	18
Figure 10: Shares of companies active in production of electricity and of those active in distribution, transmission and trade of electricity, 2019	19
Figure 11: State of liberalisation of the electricity sector in the EU27 and the UK, 2020	20
Figure 12: Types of ownership of electricity companies in the EU27 and the UK, 2020	21
Figure 13: Domain coverage of trade unions in the electricity sector (number)	32
Figure 14: Involvement of trade unions in collective bargaining	47
Figure 15: Domain coverage of employer organisations/business associations in the electricity sector (number)	53
Figure 16: Involvement of employer organisations in collective bargaining (%)	58
Figure 17: Trade union involvement in consultation (number)	61
Figure 18: Employer organisation involvement in consultation (number)	62
Figure 19: Trade unions in the electricity sector affiliated to EPSU	72
Figure 20: Trade unions in the electricity sector affiliated to IndustriAll Europe	75
Figure 21: Comparative analysis of trade union coverage, involvement in collective bargaining and European-level affiliation for each part of the electricity sector	80
Figure 22: Employer organisations in the electricity sector affiliated to Eurelectric	87
Figure 23: Sectoral coverage of employer organisations affiliated to Eurelectric (number)	88

Country codes

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

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social actors – that is, the trade unions and employer organisations – in the electricity sector and to show how they relate to the sector’s European-level organisations representing employees and employers.

The report is divided into three parts: an overview of the economic specificities of and the employment trends in the electricity sector; an analysis of the social partner organisations in all 27 EU Member States; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the electricity sector, which was established in its current form in 2000, following the reorganisation of European social dialogue.

0.1. Objectives of the study

Representativeness studies are conducted for four reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is a criterion to be eligible for setting up or participating in an ESSDC.
- Representativeness also means having the capacity to negotiate agreements that can be implemented by Council decision, as provided for by Article 155 of the TFEU.
- The information in this study aims to provide guidance for efforts to build the capacity of European social partner organisations.

Representativeness is defined by European Commission Decision 98/500/EC on the establishment of sectoral social dialogue committees promoting dialogue between social partners at European level (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative EU-level social partner organisation. The organisation must relate to specific sectors or categories and be organised at European level. The organisation should represent organisations that are themselves an integral and recognised part of Member States’ social partner structures, that have the capacity to negotiate agreements and that are representative of several Member States. The organisation should have adequate structures to ensure its effective participation in the work of an ESSDC.

To accomplish its aims, this study first identifies the relevant national social partner organisations in the electricity sector before analysing the structure of the sector’s relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European levels of interest representation. The study includes only organisations whose membership domain is classed as ‘sector-related’. In terms of territorial coverage, the study includes the 27 EU Member States. In Annex 2 to the report, a few tables providing information on the national-level organisations organising workers and employers in the electricity sector in the United Kingdom (UK) are included, as the data collection for this study was conducted in early 2020, prior to the UK’s withdrawal from the EU on 31 January 2020.

0.2. Historical background on European sectoral social dialogue in the electricity sector

The electricity ESSDC was established in 2000, by the European Federation of Public Service Unions (EPSU), the European Mine, Chemical and Energy Workers' Federation (EMCEF) (now IndustriAll European Trade Union (IndustriAll Europe)) and Eurelectric, the federation of the European electricity industry. Social dialogue is an essential pillar of the European social model, and it represents an important tool for the European social partners' participation in the governance of the European Union (European Commission, 2010). As established by Articles 152–155 of the TFEU, it is an obligation of the EU to promote social dialogue and to respect the autonomy of the social partners. These provisions are implemented through the ESSDCs, which have replaced the informal structures and joint committees that existed prior to 1998 (European Commission, 1998). The electricity sector has a strong history of social dialogue both at national level and at European level. The sector, which is characterised by increasing internationalisation, has a history of monopolistic public ownership, with strong and efficient social dialogue.

Following a period of stability in the decades after the Second World War, the electricity sector has undergone major transformations across western Europe, as have most utilities sectors (Eurofound, 1999). Privatisation and liberalisation of electricity services since the early 1980s in western Europe have resulted in an increase in competition, as well as changes in sectoral employment and working conditions. The European social partners established an informal social dialogue working group in 1995, prior to the adoption of the Energy Sector Directive (Directive 96/92/EC),¹ which represented one of the first steps towards setting common rules for the internal electricity market (Telljohann, 2001). The formal electricity ESSDC was established in 2000, and its first years of activity reflected interests in managing the social implications of the internal electricity market, health and safety, training and lifelong learning.

In the past decade, the ESSDC's activities have largely focused on technological innovations in the production, transmission and distribution networks, digitalisation and the challenges posed by the transition to a climate-neutral economy in the energy sector. The 2020 climate and energy framework, followed by the 2030 climate and energy package and the 2050 long-term strategy on climate neutrality have set ambitious targets for cutting greenhouse gas emissions, increasing the share of renewable energy and increasing energy efficiency. The most recent tools developed by the European Commission to support these changes are gathered under the Just Transition Fund for 2021–2027 and focus on three levels: regions, industries and workers. The European social partners have jointly agreed that, for a just transition to clean energy, comprehensive social dialogue and adequate funding and financing mechanisms will be vital to ensure comprehensive and intensive reskilling of the current workforce and the creation of good-quality jobs in the sector (ESSDC meeting minutes, 2017 and 2021; see also Section 1.6). The just transition is, then, among the topics on which the electricity ESSDC is currently focused, along with attracting new skills and young people to the sector, equal opportunities, diversity and inclusion, skills (including anticipating skills needs), work–life balance, health and safety, competition from other energy sources and 'behind the meter' solutions (e.g. photovoltaics), the security of the energy supply, demographic change and restructuring the industry. One characteristic

¹ Directive 96/92/EC was replaced by the Internal Market in Electricity Directive (Directive 2003/54/EC) and later by Directive 2009/72/EC, which in turn was repealed by Directive (EU) 2019/944.

of this sector, like other energy sectors, is that the most commonly discussed social dialogue topics are non-wage-related.

The organisations that were represented in the electricity ESSDC on its establishment were EPSU and EMCEF on the workers' side and Eurelectric on the employers' side. In 2012, EMCEF was replaced by IndustriAll Europe, which was formed by the consolidation of EMCEF, the European Metalworkers' Federation (EMF) and the European Trade Union Federation – Textiles, Clothing and Leather (ETUF-TCL) (Table 1).

Table 1: Organisations currently represented in the electricity ESSDC

Representing workers	Representing employers
EPSU	Eurelectric
IndustriAll Europe	

Source: Web page of the electricity sector ESSDC

Since the formal establishment of the electricity ESSDC, there have been 41 commonly agreed texts and opinions covering various topics (Figure 1). Notable topics in the ESSDC's first decade included restructuring, health and safety, preventing harassment and promoting diversity, corporate social responsibility, innovation and technology, and market design and regulations; in the past decade, it has focused in particular on qualifications and training and on energy and climate policies.

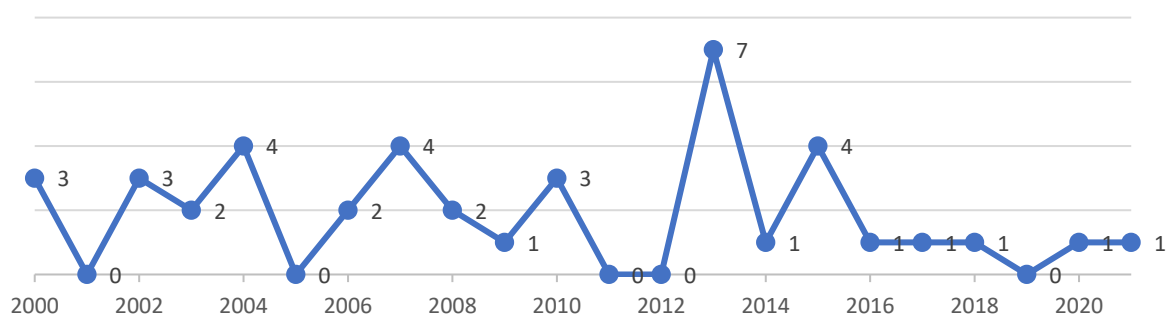
Figure 1: Main topics covered by electricity ESSDC joint texts



Source: Compiled by the authors based on data from the European Commission's social dialogue texts database, accessed 1 February 2021

Despite the large number of joint texts compared with other sectors (Degryse, 2015), the electricity ESSDC has not signed any binding agreements or negotiated on any 'hard' topics such as pay or working time (Lafuente Hernandez, 2016). As Figure 2 illustrates, the numbers of joint opinions have varied over the years. One possible explanation for this is that the ESSDC has focused its activities on responding to developments in the sector.

Figure 2: Number of joint texts agreed by the electricity ESSDC, 2000–2021



Source: Compiled by the authors based on data from the European Commission's social dialogue texts database, accessed 1 February 2022

It should be mentioned that, aside from agreeing more than 40 joint texts, the social partners in the electricity sector have also been involved in capacity-building and advocacy initiatives and joint projects. One example is the Skills2Power project,² launched in 2018 and coordinated by the three European social partners for the electricity sector; the initiative aims to develop concrete joint strategies for anticipating and monitoring needs for upskilling and reskilling of workers in the sector in France, Hungary, Italy, Spain and Sweden.

A full list of the joint texts showing their dates and topics is provided in Table 40, in Section 3.9 on the capacity to negotiate of the European social partners.

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity. Each of these criteria will be defined in this section, starting with sector-relatedness and the demarcation of the electricity sector.

Sector-relatedness

By agreement with the social partners and the Commission, the electricity sector is defined by European statistical classification of economic activities (NACE) Revision 2 code 35.1 (Table 2 and Figure 3).

Table 2: Demarcation of the electricity sector based on NACE code 35.1

NACE 35.1	Electricity
35.11	Production of electricity
35.12	Transmission of electricity
35.13	Distribution of electricity
35.14	Trade of electricity

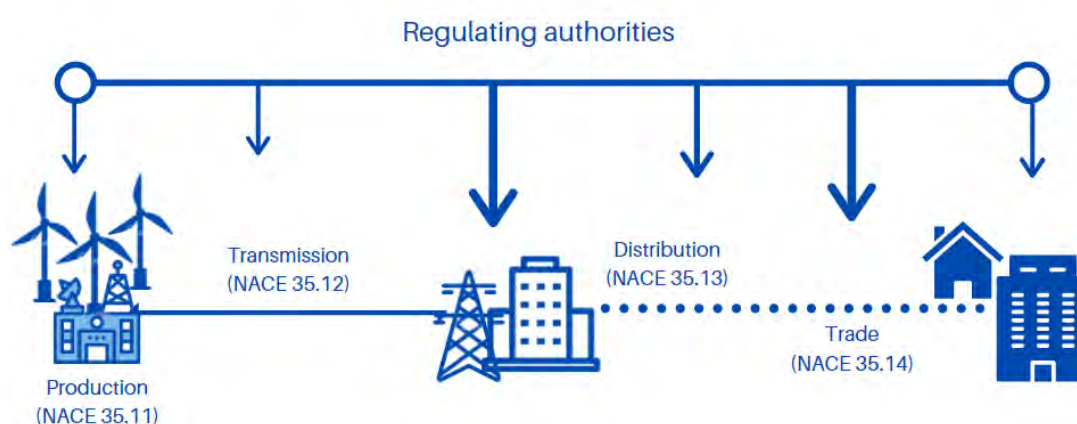
Source: NACE Rev. 2

An important aspect to clarify at this stage is the definition of each part of the sector. Using the NACE definitions, the parts of the electricity sector can be understood as follows.

² More details on the project are available at <https://news.industrial-europe.eu/Article/643>

- **Production of electricity** refers to the operation of generation facilities that produce electric energy, including thermal, nuclear, hydroelectric, gas turbine, diesel and renewable energy. Note that this class does not cover production of electricity through incineration of waste, which is covered by NACE 38.21.
- **Transmission of electricity** covers the operation of transmission systems that convey the electricity from the generation facility to the distribution system – that is, the movement of electricity from a power plant or power station to the various substations. Transmission lines cover long distances and carry power or electricity in a three-phase supply system at very high voltage.
- **Distribution of electricity** includes the operation of the distribution systems (consisting of lines, poles, meters and wiring) that convey electric power received from the generation facility or the transmission system to the final consumer. Thus, this part of the sector entails the movement of electricity from the substation to the consumer (i.e. to residential and commercial customers). Distribution requires a single-phase supply system carrying electricity at a low voltage over shorter distances.
- **Trade of electricity** refers to the sale of electricity to the user: the activities of electric power brokers or agents who arrange the sale of electricity via power distribution systems operated by others, and the operation of electricity and transmission capacity exchanges for electric power.

Figure 3: The electricity sector activities covered by the report



Source: Eurofound

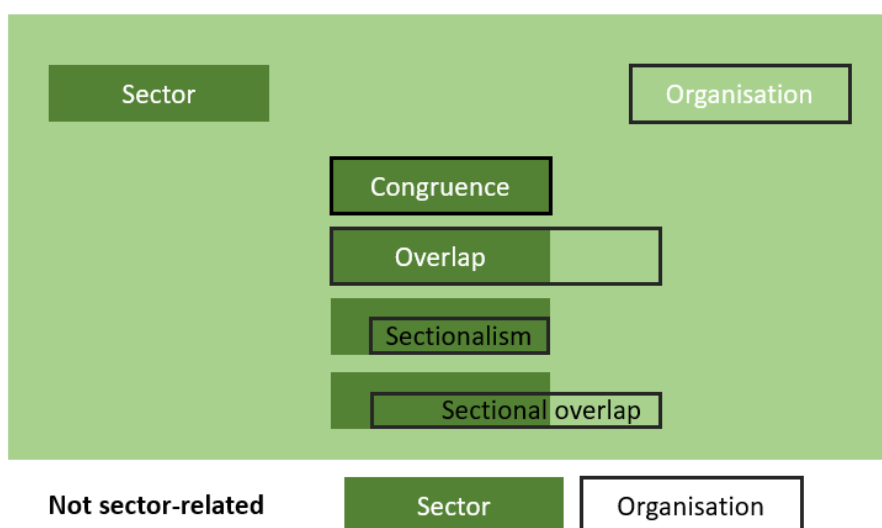
The membership domains of trade unions and employer organisations may match exactly this demarcation of the sector, which is a type of sector-relatedness called ‘congruence’. If the membership domain of an organisation goes beyond the electricity sector as defined here, it is an ‘overlapping’ organisation. A ‘sectional’ organisation’s domain covers part of the electricity sector (and no other sectors), whereas ‘sectional overlap’ means that an organisation covers part of the electricity sector and also has members in other sectors (Table 3 and Figure 4).

Table 3: Membership domain patterns of an organisation

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	<i>Does the domain of the trade union/employer organisation cover all employees/companies in the electricity sector?</i>	<i>Does the trade union/employer organisation also represent employees/companies outside the electricity sector?</i>
Congruence	Yes	No
Overlap		Yes
Sectionalism	No	No
Sectional overlap		Yes

Source: Eurofound

Figure 4: Four different types of sector-relatedness



Source: Eurofound

Membership

Membership is another important aspect of representativeness, and this study looks at two levels. First, the geographical coverage of the EU-level organisations (for instance, how many Member States an EU-level trade union/employer organisation has affiliates in) and, second, the organisational density of the national affiliates. The study also considers whether the EU-level players organise most, or at least the most significant, national-level players (significant in relation to their membership strength in the sector and their involvement in collective bargaining) or whether there are major gaps in their membership domains.

Organisational capacity

The organisational capacity of the European social partners is analysed in terms of their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. For this assessment of their capacity to negotiate, the actors, their objectives and the decision-making structures provided for in their statutes are considered, as are the outcomes (in terms of texts agreed) and the processes

through which the organisations obtained a mandate, support and approval from their member organisations during the negotiation process.

The involvement of social partners' members in national-level collective bargaining is important, as it shows that the affiliates are able to obtain a mandate to negotiate on behalf of their members (at least at national level, which could then translate to a mandate to negotiate at EU level). Such a mandate, whether implicit or explicit, allows for negotiations to take place at European level that could potentially result in binding agreements or the drafting of European autonomous agreements requiring implementation by social partners at national level, in line with their respective practices and traditions. The capacity to act autonomously in this way among those represented on the ESSDC contributes to the committee's effectiveness.

Finally, representativeness also depends upon organisations' structures and resources, their capacity to encourage the active participation of their members and combine the different interests of member organisations, and their ability to act autonomously at European level. Effective participation in the ESSDC is assessed on, among other factors, presence at committee meetings within the two years prior to the publication of this report, based on the available data. While this is not a comprehensive measure of effective participation, nonetheless it is relevant for the objectives of this report, since it provides an indication of the European organisations' capacity to mobilise their members. Involving internal structures within the European organisations when preparing for ESSDC meetings and discussing social affairs linked to EU-level dialogue can increase efficiency and ensure that more organisation members feel represented than just those that directly participate in the meetings.

0.4. Data collection

The representativeness study combines top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of IndustriAll Europe, EPSU and Eurelectric, while the bottom-up approach looks for other organisations involved in electricity sector-related collective bargaining in the Member States and their membership of European-level organisations.

Except where otherwise stated, this study draws on country reports provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates were provided rather than leaving a question blank.

Thus, most quantitative data used in the report stem from three sources, namely:

- official statistics and representative surveys
- administrative data, such as membership figures provided by the respective organisations (e.g. to calculate density rates) and companies' annual reports
- estimates, expert opinions and assessments made by the Network of Eurofound Correspondents or representatives of the respective organisations

Other sources include data and reports published by the European-level organisations participating in the electricity ESSDC and their respective members, the European Commission's social dialogue texts database,³ and data from Eurostat (Structural Business Statistics (SBS) and the European Union Labour Force Survey (EU-LFS)) and from the International Labour Organization (ILO). A complete list of references can be found at the end of the report.

³ The database is available at <https://ec.europa.eu/social/main.jsp?langId=en&catId=521>

It is important to mention that data collected by Eurostat in the EU-LFS cover the entire NACE 35 sector, including electricity, gas, steam and air conditioning supply activities. For this reason, when Eurostat EU-LFS data are used, no precise information at a more granular level is available. In order to provide a clearer picture of employment in the electricity sector only, as defined by NACE 35.1, data collected from the Network of Eurofound Correspondents have been used, depending on the availability of such data in each country. An analysis of the data from Eurostat and the Network of Eurofound Correspondents indicates that the largest shares of employment and companies in NACE 35 are in fact in NACE 35.1, the electricity sector.

0.5. Quality control measures

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study. A preparation meeting was held on 29 November 2019 with all the EU-level social partner organisations for the electricity sector at the premises of the European Commission.

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

Draft versions of the overview report were shared in March 2022 with the European trade union organisations EPSU and IndustriAll Europe and the European employer organisation Eurelectric, as well as the European Commission. As different social partner organisations were able to view the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information from other organisations representing a similar membership, this process involved an element of mutual control and recognition.

The final report, taking into account all comments provided, was evaluated and approved in June 2022 in a written procedure of the Eurofound Advisory Committee on Industrial Relations – which consists of representatives of both sides of industry, governments and the European Commission – in the presence of the European-level sectoral social partners identified in the report. During the written evaluation procedure period, an online meeting was organised to which delegates from the European social partner organisations for the sector were invited. After the formal evaluation, the report was edited and prepared for publication.

0.6. Structure of the report

The report consists of three main parts, beginning with a brief summary of the economic background and employment specificities of the electricity sector. The analysis is based mostly on Eurostat data (SBS and EU-LFS), which covers all of NACE 35, with data related to NACE 35.1 provided only by the Network of Eurofound Correspondents. The report then analyses the relevant social partner organisations in the 27 EU Member States. The third part considers the representative associations at European level.

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

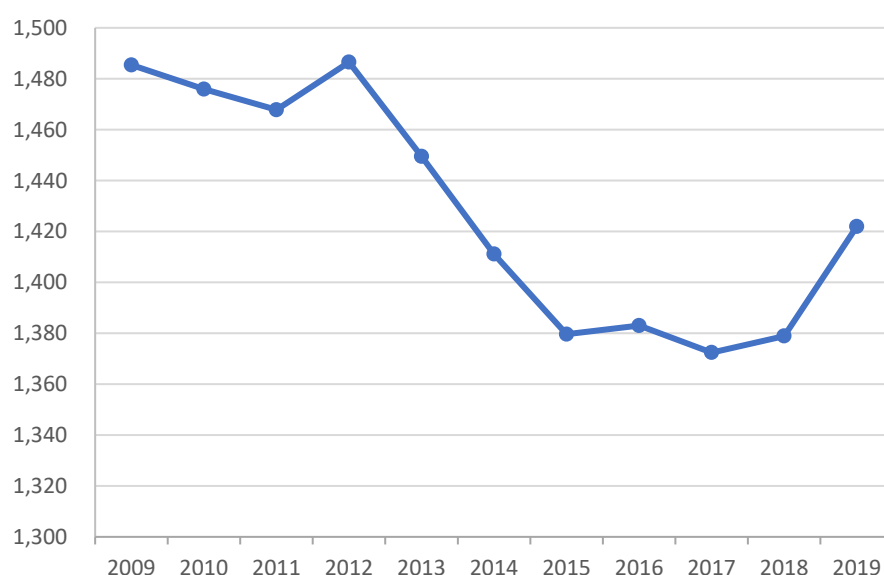
1. Economic background and employment trends

This chapter describes the economic background of the electricity sector in terms of its employment and employer structures. It outlines the scope of the workforce and the companies in the sector that are to be represented by the trade unions and employer organisations discussed in the following chapter.

1.1. Employment in the electricity sector

The electricity sector, as defined for the purpose of this study, covers production, transmission, trade and distribution of electricity (NACE 35.1). According to the SBS, there were over 900,000 people working in the electricity sector in the EU in 2019, excluding Ireland, Luxembourg, Malta and the Netherlands, for which no data were available. This number corresponds to 0.55% of the total EU workforce in 2019. According to the data collected by the Network of Eurofound Correspondents, in 2019 the EU27 workforce of the electricity sector as defined in this report was made up of 958,273 people. The overall trend at European level over the past 10 years is of a slight decrease in employment in the energy sectors, including electricity (Figure 5).

Figure 5: Workforce in the energy sectors, including gas and electricity (NACE 35), in the EU27, 2009–2019 (thousands of people)



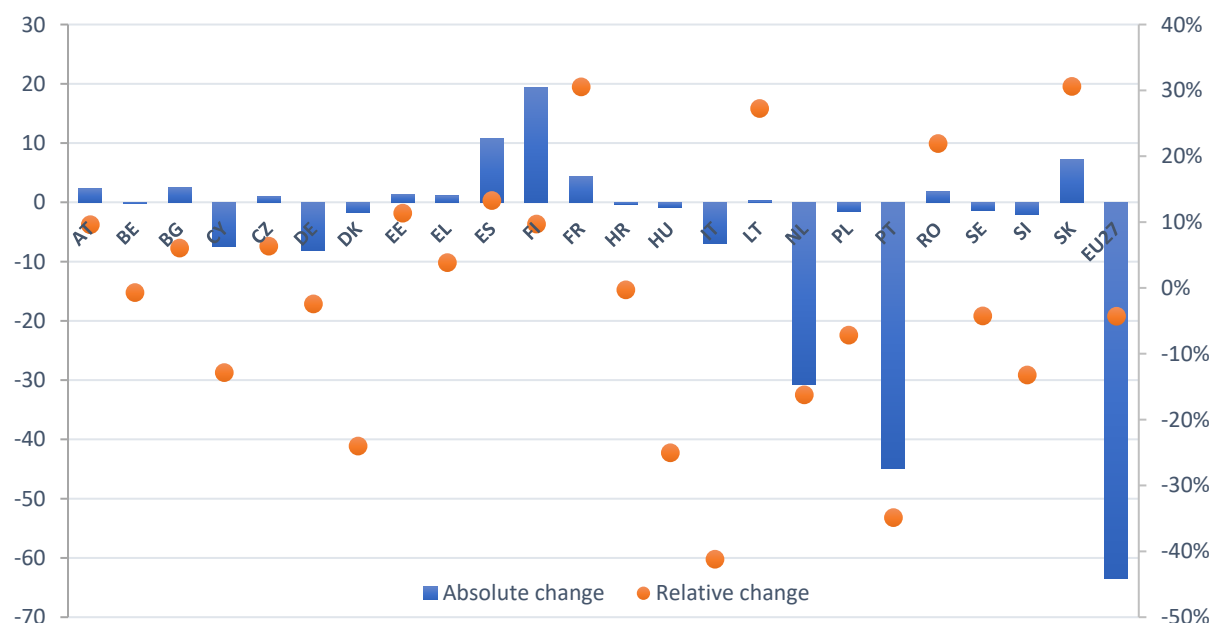
Source: Eurostat, SBS, extracted 20 October 2021

In absolute numbers, the electricity sector is larger in Germany, Poland, France and Italy than in the other Member States, accounting for almost 250,000 employees in the first country and more than 50,000 in each of the other three. Together, these countries account for a little over 51% of the sectoral workforce in the EU. In terms of the share of total employment in each country, the NACE 35.1 sector is most significant in Bulgaria, Germany, Greece, Slovenia and Croatia. There are seven other Member States in which the share of sectoral employment is higher than 0.55% of the national workforce, which is the EU27 average for the sector.

Factors influencing changes in employment in the sector

Recent decades have brought significant transformations in all parts of the sector in most EU Member States. At the end of 20th century, the sector was traditionally characterised by state monopolies dominating production, transmission, distribution and trade of electricity and gas. **The liberalisation and regularisation of the electricity market** have impacted sectoral employment in most EU countries (Figure 6). As the previous representativeness study on the electricity sector noted, **liberalisation has been the cause of most of the restructuring** in this sector in the EU since the second half of the 1990s (Eurofound, 2014). Only in a few cases has it translated into growth in sectoral employment, as in France, Lithuania, Romania, Slovakia and Spain. The loss of jobs resulting from **restructuring affected mostly low-skilled workers in the sector, and demand for highly educated and experienced professionals increased**. In terms of generational distribution, liberalisation gave rise to early retirement for a significant share of the sectoral workforce in some Member States and to poorer employment prospects for young professionals.

Figure 6: Absolute change (thousands of employees) and relative change (%) in the NACE 35.1 workforce, 2009–2019



Note: No data for Ireland, Latvia, Luxembourg or Malta; for Belgium, Estonia and France, data for 2010 were used, as data for 2009 were not available.

Source: Eurostat, SBS, extracted 20 October 2021

Shares of employment in the different parts of the sector

In terms of the shares of employment accounted for by the parts of the sector covered, production of electricity (NACE 35.11) employs 55% of the sectoral workforce at EU level (see Figure 7). At national level, there are 10 Member States in which more than half of the sectoral workforce works in this part of the sector. Moreover, in Cyprus almost the entire sectoral workforce is employed in the production of electricity.

It is noteworthy that NACE 35.11 includes a rather new part of the sector: **production of renewable electric energy**. Data collected by the Network of Eurofound Correspondents reveal that in several countries this specific part of the sector is responsible for increasing sectoral employment, and this is

the case in Estonia and France, among other countries. The positive relationship between employment and production of electricity from renewable sources is supported by the findings of several studies cited by the ILO (2018) that suggest that **the labour requirements of renewable energy production are higher than those of fossil-fuel production**. The employment impact of increased renewable energy production has been estimated at 18 million new jobs created by 2030 at global level (Wei et al, 2010); it could provide both environmentally sustainable solutions and an improved context for decent work.

This development contrasts with the general decreasing trend in employment in the electricity sector determined by the restructuring that accompanied liberalisation processes in most countries. The ILO found that increasing the generation of electricity from renewable sources results in job creation (ILO, 2018). Thus it can be assumed that a transition to renewable energy production, as envisaged by the energy and climate policies of the EU, will positively affect sectoral employment. This is confirmed by the estimated gains under the 'Fit for 55' package, which is expected to create around 2 million middle-skilled, middle-paying jobs across the EU Member States by 2050, in the energy, manufacturing and construction sectors (European Commission, 2021). Moreover, a report by the management consulting firm McKinsey estimates that the transition to net-zero emissions could create a net increase in jobs of over 2 million by 2030 across all economic sectors in the EU alone, reaching almost 5 million by 2050 (McKinsey, 2020). The same report indicates that this would amount to a 1% increase in total employment in the EU by 2030 and a 2.5% increase by 2050.

Returning to the different parts of the sector, at European level, distribution of electricity (NACE 35.13) is the second largest part of the sector in terms of the proportion of the workforce employed, with a share of 26% (Figure 7). There are three Member States in which more than half of the sectoral workforce works in this part of the sector, the highest share being registered in Croatia (62%).

Only the Netherlands has a significant proportion of the sectoral workforce employed in transmission of electricity (NACE 35.12), while Cyprus and Luxembourg have no employment registered for this subsector, which may be a consequence of the data encoding of the official statistics.

With regard to trade of electricity (NACE 35.14), Denmark, Germany, Ireland and the Netherlands have more than one-fifth of the sectoral workforce employed in this part of the sector, whereas Cyprus records zero employment for NACE 35.14.

Table 4: Numbers of enterprises, workers and employees in the electricity sector in the EU27, 2018

	Enterprises					Employees				
	35.1	35.11	35.12	35.13	35.14	35.1	35.11	35.12	35.13	35.14
AT	1,328	1,191	5	62	70	27,155	12,553	3,126	10,008	1,468
BE	550	406	:	37	:	30,168	17,704	:	10,168	:
BG	1,534	1,422	4	8	100	26,765	13,408	:	5,907	:
CY	82	82	0	0	0	2,129	2,129	0	0	0
CZ	11,270	:	:	:	:	21,221	:	:	:	:
DE	62,900	60,537	362	1,040	961	249,686	110,869	5,556	80,869	52,392
DK	1,097	921	10	57	109	6,794	2,953	840	1,089	1,912
EE	126	75	5	17	29	3,292	2,067	:	:	93
EL	6,787	6,498	4	56	229	23,060	14,629	1,474	6,436	521
ES	14,539	13,940	20	337	242	32,680	15,408	1,775	10,209	5,289
FI	509	301	9	103	96	11,582	6,677	377	2,675	1,853
FR	26,570	:	:	136	227	66,590*	47,350*	9,185*	1,508	8,547
HR	556	516	3	7	30	11,167	2,752	1,108	6,943	364
HU	716	607	3	27	79	19,341	8,271	611	10,085	374
IE*	< 20*	4*	1*	1*	5*	10,000*	4,000*	400*	2,000*	3,500*
IT	8,246	7,460	10	101	675	62,572	30,729	3,658	18,702	9,483
LT	1,252	1,147	13	23	69	7,005	2,773	318	3,580	334
LU	70	57	0	3	10	1,250*	240	0	:	:
LV	420	362	8	20	30	5,277	2,415	568	2,205	89
MT*	9*	9*	0	0	0	910*	~140*	~600*		~160*
NL	1,388	987	90	60	251	~28,000*	3,932	15,874	:	7,047
PL	2,846	2,133	25	105	583	88,247	45,791	:	:	11,461
PT	4,305	4,228	2	14	61	8,432	3,661	:	:	1,309
RO	985	845	6	30	104	44,745	28,134	2,117	12,272	2,222
SE	2,114	1,848	10	112	144	22,550	11,823	:	8,229	:
SI	1,327	1,253	3	20	51	6,459	1,971	:	3,123	:
SK	392	291	:	:	69	10,463	4,631	:	:	1,324
EU27	150,000	144,783	600	2,501	4,645	905,717	501,965	48,681	238,679	116,395

Notes: * Eurostat data were not available and data provided by the Network of Eurofound Correspondents were used; this was the case for Ireland and Malta, and partially for France, Luxembourg and the Netherlands. ':' indicates that data were not available.

Source: Eurostat, SBS, extracted 20 October 2021

Figure 7: Shares of employment in parts of NACE 35.1 in the EU27, 2020



Notes: Data for Czechia and Malta were not available. For Belgium, Bulgaria, Slovenia and Sweden, data on NACE 35.12 and 35.14 were not available. For Estonia, Poland, Portugal and Slovakia, there were no data for NACE 35.12 or 35.13. For Luxembourg, the lack of a recorded workforce for NACE 35.12 is probably due to a problem with the encoding of the official data, as the transmission of electricity does take place there; no data were available for NACE 35.13 or 35.14. * For France, Ireland and the Netherlands, no data were available in the Eurostat datasets and estimates were provided by the Eurofound correspondents.

Source: Compiled by the authors using data from Eurostat and the Network of Eurofound Correspondents for 2020

Demographic specificities, occupations and working conditions in the electricity sector

As noted by the European Institute for Gender Equality, the energy sector has been and continues to be affected by persistent gender inequalities and stereotypes that portray the sector as an environment less suitable for women than men (EIGE, 2017). As the previous representativeness study on the sector notes, the liberalisation process brought a slight increase in occupations in which more women tend to be employed; however, **the share of women in the workforce has increased rather slowly**, albeit constantly (Eurofound, 2014). In 2009, the share of women working in NACE 35 across the EU27 Member States was 22%, and it had increased by only 3% by 2019 (Table 5). The participation of women in the electricity labour force seems to be particularly low in the conventional parts of the sector, while women workers are better represented in the newer, renewable part of the sector. At global level, 32% of jobs in the renewable energy industry were held by women in 2018, according to a report by the International Renewable Energy Agency (2019).

Table 5: Shares of men and women workers in NACE 35 in the EU27, 2009–2019 (%)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Men	78	78	78	77	77	77	76	78	76	76	75
Women	22	22	22	23	23	23	24	22	24	24	25

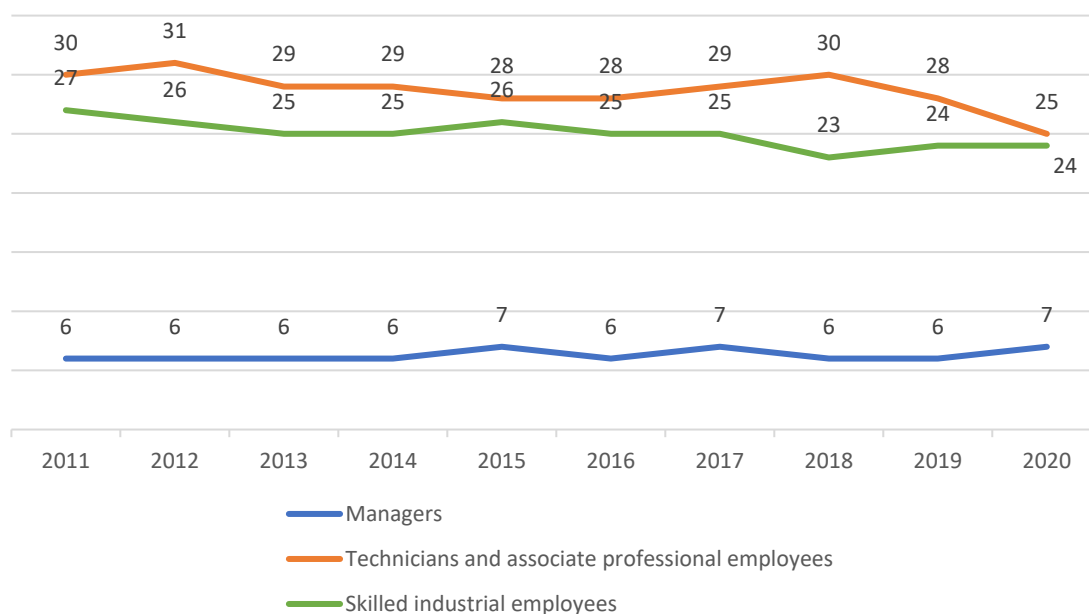
Source: Eurostat, EU-LFS, extracted 21 October 2021

From a **generational perspective**, the sector is also affected by an ageing workforce. As documented by the European Commission’s Joint Research Centre, younger age cohorts⁴ are underrepresented in the sector (Czako, 2020); younger workers in the sector are more likely to participate in upskilling programmes, which will be essential for the transition to a greener economy, as evidenced by the University of Hull (2017).

In terms of categories of workers, around one-third of employees working in the entire energy sector are technicians and associate professional employees (Figure 8). Their role in the sector is, however, decreasing, as in 2011 they made up 30% of workers in the sector, while in 2020 that share had decreased to 25%. A smaller decrease was registered for the group of skilled industrial employees, who in 2011 comprised 27% of the sectoral workforce, which had declined to 24% in 2020. There was a very modest increase in the share of managers in the sector; this was the only category that registered growth, from 6% in 2011 to 7% in 2020.

⁴ Younger age cohorts are defined as follows in the Joint Research Centre report: ‘Younger generations comprise “Millennials” also known as “Generation Y”, and “Generation Z”. The former is the demographic cohort born between 1981 and 1996, the latter is demographic cohort born between 1996 and 2010.’

Figure 8: Shares of socioeconomic groups in NACE 35 in the EU27, 2011–2020 (%)



Note: ‘Technicians and associate professional employees’ refers to mid-level professionals (similar to International Standard Classification of Occupations group 3) and ‘skilled industrial employees’ to lower-level workers (similar to International Standard Classification of Occupations group 7).

Source: Eurostat, EU-LFS, extracted 21 October 2021

From the point of view of working conditions and forms of employment, the energy sector, including electricity, is **generally characterised by favourable working conditions**. The importance of energy for other economic sectors, as well as the crucial role of workers in the utilities sectors, are among the factors influencing sectoral working conditions (Eurofound, 2005). Data collected by the Network of Eurofound Correspondents reveal that in most Member States **standard forms of employment continue to prevail**; temporary contracts and self-employment are not common. A significant change in type of employment in recent decades has been **a constant decrease in the civil servant category** of workers in the sector as a consequence of privatisation processes. It is also noteworthy that the number of very small companies with fewer than 10 employees is increasing in most Member States. There are strong indications that in some countries (Greece and Hungary, for example), these are one-person companies that have small renewable energy generators (such as solar panels or wind farms) and trade the energy they generate to larger companies.

A new element in the sector since the previous sectoral representativeness study (Eurofound, 2014), is **an increase in the foreign-born⁵ labour force** in some countries. Data provided by the Network of Eurofound Correspondents reveal that this is the case in Czechia, Finland, Germany and Sweden. While no statistical information on the precise share of the migrant workforce in the sector in each country is available in the datasets collected by the Network of Eurofound Correspondents, or those available in the EU-LFS, this phenomenon is confirmed by a recent ILO study, which found that in high-income countries more migrant workers than nationals work in what the study refers to as ‘secondary sector jobs’, namely mining and quarry; manufacturing; electricity, gas and water; and construction (ILO,

⁵ As defined by Eurostat, the EU’s foreign-born population consists of people born outside their country of residence, including both people born in an EU Member State other than that in which they live and people born outside the EU.

2020). This development has an impact on industrial relations in the sector⁶ and also determines changes in the forms of employment in the sector. Newly arrived migrant workers are more likely to accept the fixed-term contracts that are still rare in a sector traditionally characterised by standard forms of employment. There is no clear evidence in the reports from the Network of Eurofound Correspondents with regard to the skills profiles of the jobs that are increasingly carried out under fixed-term contracts by foreign-born workers.

1.2. Characteristics of employers in the electricity sector

The most recent data available in the SBS show that in 2018 the total number of companies in the EU Member States performing electricity production, distribution, transmission and trade activities (NACE 35.1) was 150,000. The number of enterprises has increased during the past 10 years for which data are available, in contrast to the employment decrease (see Section 1.1). All 27 Member States registered an increase in the number of companies active in production, distribution, transmission and trade of electricity, except Denmark, where the number decreased by 13%, from 1,261 in 2008 to 1,097 in 2018 (Table 6). At European level, **the total number of enterprises in the electricity sector has almost tripled**, from 55,519 in 2011 to 150,000 in 2018. Cyprus, Germany and Czechia registered the biggest increases in the number of companies between 2008 and 2018.

Table 6: Number of enterprises in NACE 35.1 in the EU27, 2008–2018

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
AT	748	775	995	1,031	1,165	1,259	1,259	1,358	1,395	1,442	1,328
BE	:	:	:	:	501	577	655	826	698	675	550
BG	493	836	1,008	1,319	1,631	1,714	1,670	1,683	1,649	1,621	1,534
CY	1	1	4	8	12	38	50	58	61	71	82
CZ	653	993	2,819	4,751	5,546	8,000	9,969	10,544	10,562	10,988	11,270
DE	1,122	1,173	1,205	1,240	1,344	1,402	1,473	1,461	1,395	1,444	62,900
DK	1,261	1,231	1,239	1,367	1,447	1,387	1,331	1,285	1,135	1,128	1,097
EE	69	80	95	92	101	99	97	101	108	116	126
EL	:	3	:	:	12	28	8,162	6,767	6,653	6,724	6,787
ES	11,787	12,470	12,817	14,711	13,722	13,650	14,022	13,804	13,826	14,530	14,539
FI	331	338	344	357	368	399	437	477	492	489	509
FR	3,479	6,148	13,932	16,311	18,113	20,254	24,360	26,472	29,157	26,027	26,570
HR	74	123	158	252	307	432	477	490	581	595	556
HU	318	359	389	420	416	421	412	362	447	545	716
IE	:	:	:	:	:	:	:	:	:	590	:
IT	1,765	2,213	3,291	5,758	8,129	9,336	9,622	9,925	10,680	8,140	8,246
LT	122	139	165	201	400	1,115	1,327	1,385	1,338	1,328	1,252
LU	43	44	47	48	56	55	62	62	65	65	70
LV	157	204	260	259	328	346	371	390	422	427	420
MT	:	:	:	:	:	:	:	:	:	:	:
NL	558	687	673	697	757	940	1,176	1,115	1,183	1,237	1,388
PL	1,080	1,378	1,393	1,787	2,015	1,933	1,960	2,537	3,008	3,594	2,846
PT	613	647	680	741	830	867	884	1,147	3,915	4,002	4,305
RO	340	460	706	744	870	1,156	1,310	1,264	1,156	1,038	985

⁶ For example, it increases the demand for services (such as safety training) to be provided by trade unions in multiple languages and for services such as helping to fast-track immigration applications by migrant workers.

Representativeness of the European social partner organisations: Electricity sector

SE	1,294	1,372	1,550	1,709	1,867	1,957	2,128	3,887	5,563	3,012	2,114
SI	367	431	596	826	1,248	1,464	1,500	1,461	1,437	1,417	1,327
SK	45	49	104	119	173	223	350	296	348	347	392
EU27	:	:	:	55,519	60,000	70,000	85,511	90,000	100,000	91,600	150,000

Note: ‘:’ indicates that data were not available.

Source: Eurostat, SBS, extracted 14 January 2021

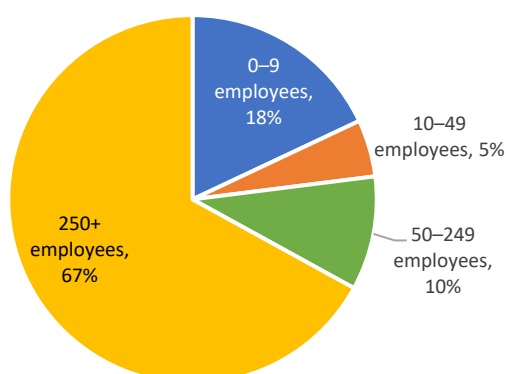
As explained in the previous representativeness study on the sector, **one of the main factors explaining this increase is market liberalisation** in most countries (Eurofound, 2014). Data collected by the Network of Eurofound Correspondents indicate that in 2020 the liberalisation process had been completed in most countries, although it was still ongoing in Bulgaria, Croatia, Cyprus, Greece, Latvia, Lithuania, Romania, Slovakia and Slovenia. It can therefore be assumed that during 2021 and 2022 liberalisation continued in these countries, with a reduction in regulations and a corresponding increase in the number of companies.

Furthermore, as mentioned in the previous section, **the growing interest in the production of energy from renewable sources**, boosted by governmental incentivisation of this segment, is also likely to increase the number of companies in all EU countries. So far, in most of the Member States in which a significant increase in the number of enterprises involved in the production of electricity has been registered, the new entrants are small and very small companies active in the renewable part of the sector.

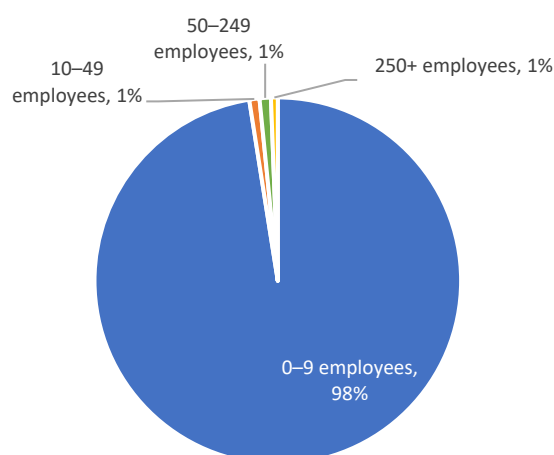
Data from both the SBS and the Network of Eurofound Correspondents indicate that, despite the increasing number of small companies in the sector, most employees work in large companies. As Figure 9 shows, 67% of people employed in the electricity sector in 2018 were working in companies with 250 employees or more. At the same time, only 1% of companies active in the sector had 250 employees or more. Almost all enterprises – 98% – had fewer than 10 employees in 2018. This is an indication of the fact that large companies have a strong role in shaping the sector.

Figure 9: Employment and enterprises in NACE 35.1 in the EU27 by size class, 2018

Shares of people employed by enterprise size class



Shares of enterprises by size class

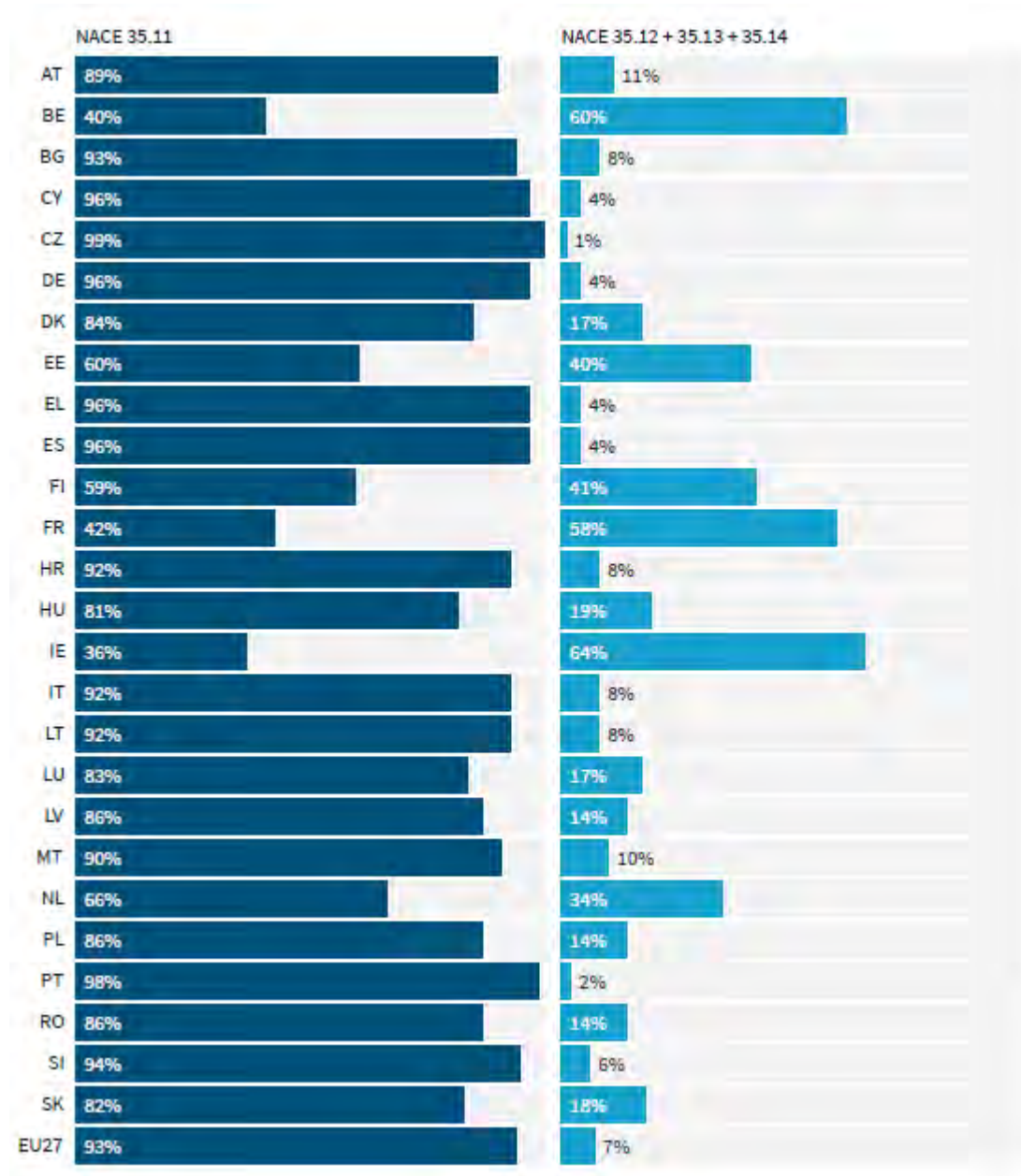


Source: Eurostat, SBS, extracted 7 January 2021

Employers in the different parts of the sector

The situation here is consistent with the data on employment in the different parts of the sector, with production of electricity (NACE 35.11) having the largest share in electricity companies in the EU27 (Figure 10). **Of EU companies in the electricity sector, 93% are active in production of electricity.** In only three Member States does this part of the sector have a share of less than 50%, namely Ireland, Belgium and France. In Belgium, the largest share of employers are companies active in trade of electricity (56%); the situation in Ireland is similar, with 45% of companies active in trading; and in France distribution of electricity is the part of the sector in which most companies are active (48%).

Figure 10: Shares of companies active in production of electricity and of those active in distribution, transmission and trade of electricity, 2019



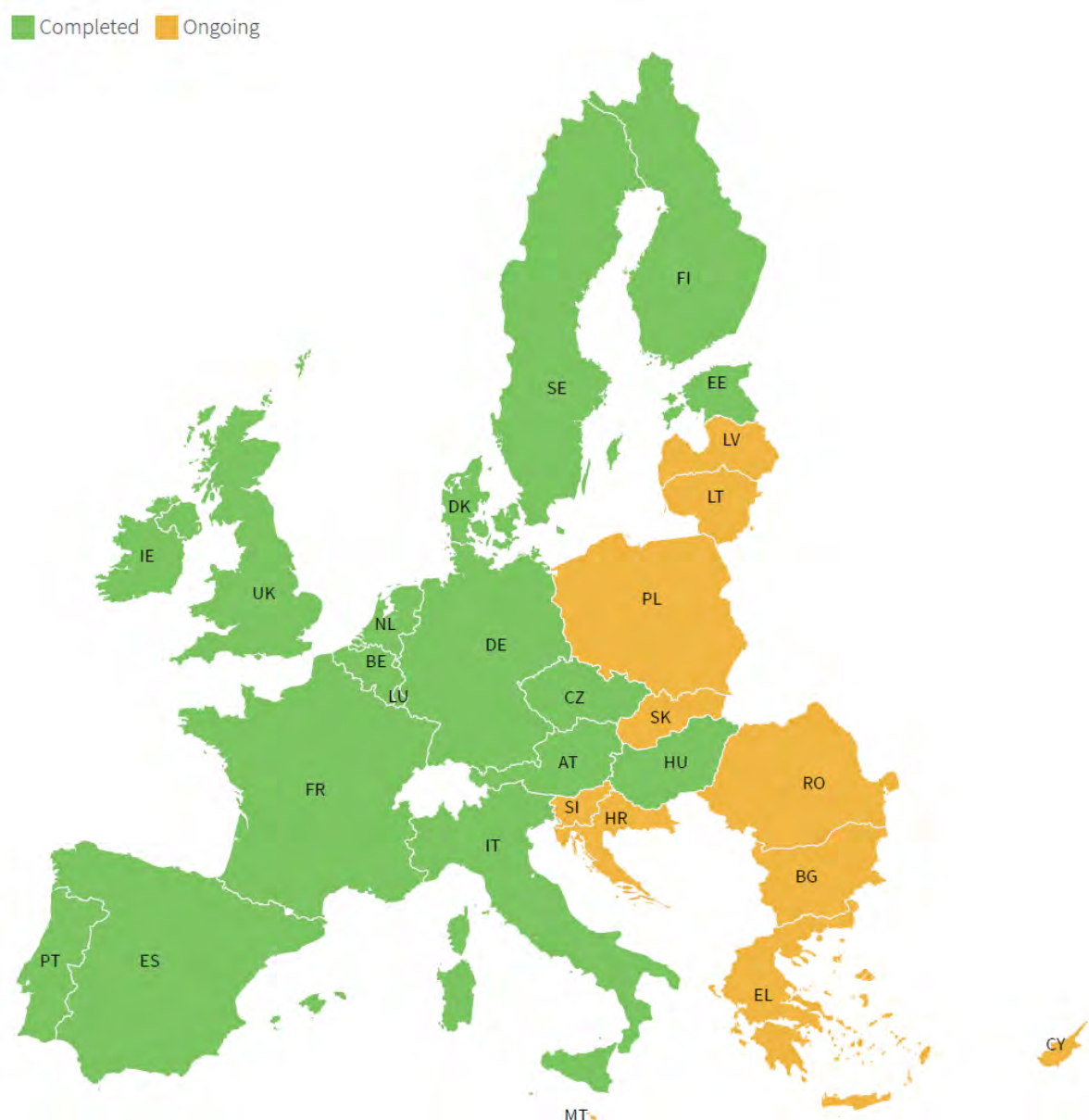
Note: Data for Sweden were not available.

Source: Compiled by the authors using data from the Network of Eurofound Correspondents for 2020

Types of ownership

In terms of ownership, enterprises in the electricity sector have undergone significant change. Starting in the 1980s in western Europe and continuing into the 1990s in eastern Europe, privatisation has gradually ended the traditional monopolistic public ownership in the electricity sector. France was among the first countries to privatise the utilities sectors, electricity included, and privatisation extended across the entire EU as a consequence of liberalisation of the energy sector (Eurofound, 1999). Most Member States had completely liberalised the energy market by 2020, although in Bulgaria, Croatia, Cyprus, Greece, Latvia, Lithuania, Romania, Slovakia and Slovenia the process is still ongoing (Figure 11).

Figure 11: State of liberalisation of the electricity sector in the EU27 and the UK, 2020

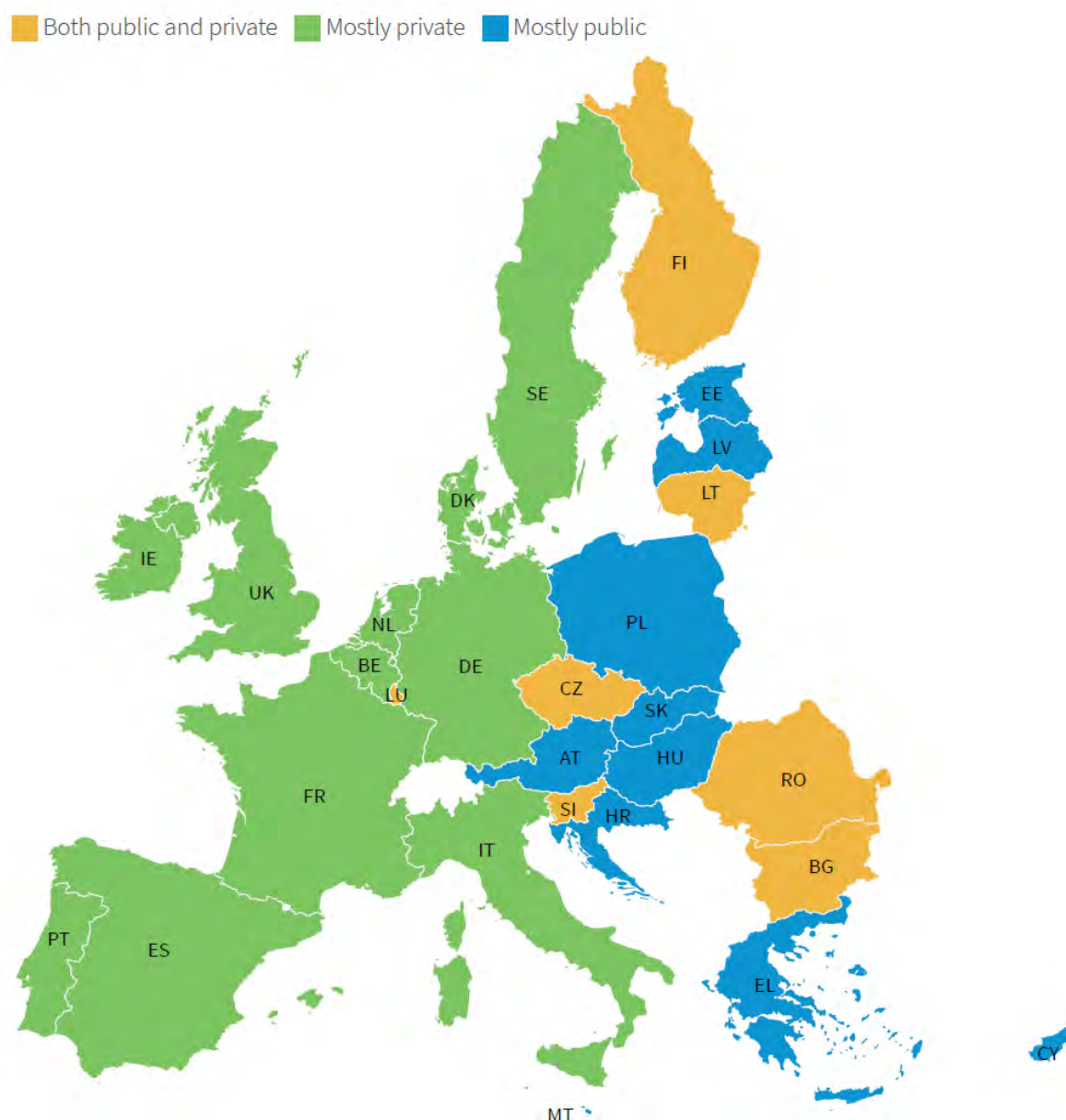


Source: Authors' illustration using data from the Network of Eurofound Correspondents for 2020

In most countries, previously state-owned large companies have been privatised and absorbed into large multinational companies. In 2020, while the share of privatised companies in the electricity

sector was high, public ownership was still fairly common (Figure 12). Austria, Croatia, Cyprus, Estonia, Greece and Hungary are among the Member States in which the share of publicly owned companies is higher than that of privately owned ones. In France, Ireland and Portugal, by contrast, private companies have a larger share in the sector.

Figure 12: Types of ownership of electricity companies in the EU27 and the UK, 2020



Source: Authors' illustration using data from the Network of Eurofound Correspondents for 2020

The key role of multinational companies in the electricity sector

Privatisation of national public companies coupled with the opening of domestic markets to competition has resulted in the internationalisation of the sector. In the financial year 2018/2019, more than half of the European workforce was employed by 14 multinational companies in 23 Member States, according to data extracted from the annual reports of the 14 largest companies in the energy sector (Table 7). Half of the 14 companies are affiliated, directly or through national

employer organisations, to Eurelectric. This means that the large multinational employers have a strong influence on industrial relations and working conditions in the sector.

Table 7: The largest 14 companies in the electricity sector in the EU, 2018/2019

Country of origin	Company name	Workers in the electricity sector in the EU ⁷	Share of 2018 EU workforce (% approx.)	Member States covered	Mentioned by the NEC as among the largest employers in	Affiliated to Eurelectric?
FR	EDF	167,730	14	BE, DE, FR, IT	FR	Yes, via UFE
FR	Engie (formerly GDF Suez)	137,200	11	BE, DE, ES, FR, IT, LU, NL, PL, PT	BE, FR	Yes, via FEBEG
FR	Schneider Electric	135,000	11	DE, ES, FR, IT, SE		Unknown
FR	Total	104,000	9	BE, DE, FR, LU, NL, PL	FR	Unknown
NL	Royal Dutch Shell	82,000	7	DK, FI, IE, NL, SE		Unknown
DE	E.ON	77,534	6	CZ, DE, DK, HU, IT, NL, PL, RO, SE	CZ, HU, SE	No
ES	Iberdrola	34,000	3	DE, ES, FR, HU, IE, IT, RO	ES	Yes, via AELEC
IT	Enel	29,767	3	BG, DE, EL, ES, FR, HR, IE, IT, NL, PL, PT, RO, SK	IT, RO	Yes
SE	Vattenfall	19,814	2	DE, DK, FI, NL	NL	Yes, via EFA
DE	RWE	17,748	1	DE, NL		Unknown
ES	Endesa ⁸	9,706	1	ES	ES	Yes, via AELEC
FI	Fortum Oyj	8,108	1	DK, EE, FI, LT, LV, SE	FI	Yes, via Energiateollisuus
NL	Essent	1,483	0	BE, NL	NL	Unknown
NL	Eneco	2,775	0	BE, NL		Unknown

Source: Compiled by the authors using data extracted from the companies' annual reports for 2018/2019 and the national contributions from the Network of Eurofound Correspondents (NEC)

At national level, there are 11 Member States in which more than half of the sectoral workforce is employed by the largest company: Croatia, Cyprus, Czechia, Denmark, France, Greece, Ireland, Luxembourg, Malta and Sweden (Table 8).

⁷ Data to be treated with caution, as no precise figures were available for the electricity sector only for any of the companies.

⁸ Enel is the parent company of Endesa and has a 70% stake in it.

Table 8: Share of the workforce employed by the largest companies in the sector, 2019/2020

	Largest company in production of electricity (NACE 35.11)	% of the national workforce in NACE 35.11 covered by CB in the company	Largest company in transmission of electricity (NACE 35.12)	% of the national workforce in NACE 35.12 covered by CB in the company	Largest company in distribution of electricity (NACE 35.13)	% of the national workforce in NACE 35.13 covered by CB in the company	Largest company in trade of electricity (NACE 35.14)	% of the national workforce in NACE 35.14 covered by CB in the company
AT	Verbund AG	12	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
BE	Fluvius Systems Operator	24	ABB	2	ORES	15	Engie Electrabel	31
BG	AEZ Kozloduy	13	ESO	15	CEZ	12	CEZ	12
CY	Electricity Authority of Cyprus	26	Electricity Authority of Cyprus	2	Electricity Authority of Cyprus	56	Electricity Authority of Cyprus	7
CZ	ČEZ, a.s.	67	ČEPS, a.s.	2	ČEZ Distribuce, a.s.	13	ČEZ Prodej, a.s.	4
DE	E.ON SE	13	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
DK	Ørsted	82	Ørsted	n.d.	Ørsted	n.d.	Ørsted	n.d.
EE	Enefit Energia-tootmine	23	Elering	7	Elektrilevi	21	Eesti Energia	28
EL	PPC Group	n.d.	AΔMHΕ/IPTO	7	ΔΕΔΔΗΕ/ HEDNO (PPC Group)*	Probably 100	PPC SA	84
ES	Endesa Generación	36	REE	5	Edistribucion Redes Digitales SI (Grupo Endesa)	24	Endesa Energia	4
FI	Fortum Oyj	4	Fingrid Oy	4	Elenia Oy	7	Fortum Oyj	3
FR	EDF	55	RTE	3	Enedis	2	EDF	55
HR	HEP proizvodnja d.o.o.	15	HOPS d.o.o.	9	HEP-ODS**	Probably 100	HEP opskrba	1
HU	MVM Paksi Atomeromu Zrt.	18	MAVIR Zrt.	5	ELMŰ Hálózati Elosztó Kft.	7	E.ON Energia-kereskedelmi Kft.	2
IE	ESB Group	70	Eirgrid	4	ESB Group	70	None	n.d.
IT	Enel	n.d.	Enel	n.d.	Enel	n.d.	Enel	n.d.

Representativeness of the European social partner organisations: Electricity sector

LT	Ignitis gamyba, AB	5	Litgrid, AB	4	Energijos skirstymo operatorius, AB	33	Ignitis, UAB	4
LU	Encevo	81	Encevo	81	Encevo	81	Encevo	81
LV	Latvenergo JSC	25	Augstsprieguma tīkls JSC	10	Sadales tīkls JSC	37	Latvenergo JSC	25
MT	Electrogas	n.d.	Enemalta plc	65	Enemalta plc	65	Arms Ltd	16
NL	Eneco	9	TenneT	14	Unclear (TenneT appears to be the main national company active in trans-mission of electricity and gas)	Probably 100 (TenneT)	Enexis	10
PL	PGE Górnictwo i Energetyka Konwencjonalna S.A.	9	Tauron Dystrybucja S.A.	12	Tauron Dystrybucja S.A.	12	PGE Obrót S.A.	n.d.
PT	EDP – Gestão da Produção de Energia S.A.	6	REN	5	EDP – Distribuição	26	EDP – Comercial	3
RO	Societatea Complexul Energetic Oltenia S.A.	28	CNTE Transelectrica S.A.	4	Electrificare C.F.R. SA	5	Electrica Furnizare S.A.	2
SE	Vattenfall	n.d.	Vattenfall	74	Vattenfall	74	Vattenfall	74
SI	Termoelektrarna Šoštanj d.o.o.	7	Petrol, d.d.	30	Elektro Ljubljana, d.d.	13	Energetika Ljubljana. d.o.o.	9
SK	Slovenské elektrárne, a.s.	34	Slovenská elektrizačná prenosová sústava	7	Západoslovenská distribučná, a.s.	14	Stredoslovenská energetika, a.s.	7

Notes: Bold indicates affiliation (direct or indirect) to Eurelectric; green shading indicates companies employing more than half of the national workforce in the relevant part of the sector. CB, collective bargaining; n.d., no data available. * The electricity distribution system in Greece is operated exclusively by ΔΕΔΔΗΕ/HEDNO (100% owned by PPC SA). ** HEP-ODS is the sole distributor in Croatia.

Source: Network of Eurofound Correspondents, 2019/2020

1.3. Industrial relations

Electricity is a sector characterised **by a high degree of unionisation** in most Member States. The data collected from the Network of Eurofound Correspondents for this report show that Austria, Belgium, Cyprus, Finland, Hungary, Romania, Slovenia and Sweden report a high unionisation rate of 70% or more of the workers in the energy sector, while the lowest unionisation rate was recorded in Lithuania – less than 10%. No reliable data regarding the rate of union membership in the sector were provided for Denmark, France, the Netherlands or Spain. This high degree of unionisation is a consequence of the former monopolistic public ownership of companies involved in electricity production, distribution, transmission and trade, under which organising workers was straightforward. This also explains the higher collective bargaining coverage of private companies in this sector compared with the private sector more generally. Collective bargaining coverage of private electricity companies is comparable to the level found in the public sector (Eurofound, 2005). This suggests that electricity companies have had the resources to seek a consensual, collaborative path to industrial restructuring and service quality improvement even after privatisation and liberalisation changed the sector.

However, not all companies play the same role in the sectoral industrial relations landscape. Despite making up a large share of employers in the sector (98%), small companies are currently rather marginal players in industrial relations. While they are numerous, micro-companies are generally new entrants and are in the process of defining their role in the electricity sector's industrial relations landscape. There is an evidence-based expectation that the growing interest in and incentivisation to engage in renewable production of electricity will result in the growing influence of small companies from this part of the sector by increasing their size.

The role played by large companies in shaping the electricity sector and its industrial relations is very significant. There are several transnational companies that cover a large share of the market in most of the Member States. Despite the differences at national level in the sector, one common feature is that a significant part of the workforce works in larger companies in most Member States (Table 9). Specifically, in 2018, 67% of the workforce in NACE 35.1 was employed in large companies with more than 250 employees.

Table 9: Types of collective bargaining in the largest companies and proportion of the workforce covered, 2019/2020

	% of the workforce covered by CB in the largest company in				% of MEB coverage at national level
	NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	
AT	12	n.d.	n.d.	n.d.	> 70
BE	24	2	15	31	~95
BG	13	15	12	12	< 50
CY	26	2	56	7	No MEB
CZ	67	2	13	4	60–75
DE	13	n.d.	n.d.	n.d.	~90
DK	82	n.d.	n.d.	n.d.	~80–85
EE	23	7	21	28	No MEB
EL	n.d.	7	~100	84	No MEB
ES	36	5	24	4	No MEB
FI	4	4	7	3	No MEB

Representativeness of the European social partner organisations: Electricity sector

FR	55	3	2	55	100
HR	15	9	~100	1	No MEB
HU	18	5	7	2	76
IE	70	4	70	n.d.	No MEB
IT	n.d.	n.d.	n.d.	n.d.	100
LT	5	4	33	4	No MEB
LU	81	81	81	81	No MEB
LV	25	10	37	25	No MEB
MT	n.d.	65	65	16	No MEB
NL	9	14	13	10	100
PL	9	12	12	n.d.	90
PT	6	5	26	3	No MEB
RO	28	4	5	2	No MEB
SE	n.d.	74	74	74	90
SI	7	30	13	9	95
SK	34	7	14	7	75

Note: CB, collective bargaining; MEB, multi-employer bargaining; n.d., no data available.

Source: Network of Eurofound Correspondents, data for 2019/2020

Demographic changes are also having a strong impact on the sector's industrial relations, as the growing migrant work force is accompanied by changes in forms of employment, as documented in data collected by the Network of Eurofound Correspondents for this report. These data reveal that worker representatives in Finland consider that newly arrived migrant workers are more likely to accept fixed-term contracts in a sector traditionally characterised by standard forms of employment. In this context, the services provided by trade unions and employer organisations are being adapted to meet the specific needs of the workers represented. Generational change also has a strong influence on industrial relations in the sector, with younger workers finding membership of a trade union less attractive, as is the case in most economic sectors.

1.4. Impact of the COVID-19 pandemic

Compared with other sectors, the electricity sector was not severely affected by the COVID-19 pandemic; however, changes did take place as a result. As documented by the International Energy Association (IEA), at the very start of the pandemic, in the first half of 2020, demand for electricity dropped significantly, reaching 'Sunday levels' (IEA, 2021). As the restrictions were eased, demand increased again. Moreover, the same source reveals that in the EU during the pandemic the demand for renewable production also increased, as did the proportion of energy produced from renewable sources, with Germany, Italy and Spain recording high levels.

According to the minutes of ESSDC meetings in 2020 and 2021, at the onset of the pandemic the French and Italian markets registered significantly decreased demand, and the pandemic affected the workforce in terms of place of work, health and safety, and work-life balance. The same source notes that collective bargaining negotiations were helpful in managing the issues affecting the sector in Italy.

Health and safety was an important topic for the sector before the pandemic, and its prominence in sectoral social dialogue only increased during it. In addition, despite worries that the pandemic might endanger electricity supplies at European level, security of supplies was in general ensured (ESSDC meeting minutes, 2020 and 2021). Furthermore, various types of government arrangements at national level were put in place to help ensure the energy security of small and medium-sized enterprises, households and other categories of electricity consumers. Eurelectric set up an internal taskforce that created a database to collect input from members on the impact of COVID-19 on the sector at national level.

As documented by the European Trade Union Institute (ETUI), electricity is among the sectors that experienced increased employment during the COVID-19 pandemic, along with all the other utilities sectors and the ICT sector (ETUI, 2021, p. 37). Furthermore, as a Joint Research Centre report suggests, with the right policies, the COVID-19 pandemic could give rise to opportunities to create more jobs in clean technologies to support the transition to a greener economy (Czako, 2020).

1.5. Digitalisation

As defined by the IEA, digitalisation of the energy sector consists in the increasing use of ICT tools in energy systems and includes the use of digital information, data analytics and insights tools, and digital communication channels for producing, transporting and trading in energy (IEA, 2017). The energy sector was among the early pioneers in using digital technologies to improve systems, specifically for the management and operation of the grid, as early as the 1970s. The process of digitalisation of the sector is ongoing and constantly evolving, as is investment in digital technologies. Currently, the digitally centralised transmission networks are an essential element of the system. The role of digital technologies in monitoring the interaction between supply and demand is increasing, as is their role in the integration of renewable energy sources into the energy market (IEA, 2017).

The impact of digitalisation on the electricity sector was covered by one of the most recent joint statements by the European social partners. Highlighting that it represents both numerous opportunities and challenges, European representatives of workers and employers agreed on a framework of actions to boost innovation in the sector, in terms both of infrastructure and of skills and job profiles. In the past decade, the sector has already undergone significant technological changes, and an important lesson learned is that implementation of new technologies is beneficial when comprehensive measures are designed to ensure that all categories of workers are adequately equipped to deal with the changes, and thus a socially responsible digital transition is ensured (ESSDC meeting minutes, 2020).

1.6. A just transition to clean energy

As noted in Section 1.1, the electricity sector is undergoing a major transformation as a consequence of the pathway to carbon-neutral electricity by 2050 and is increasingly moving towards the production of renewable electricity. The European social partners have recognised the importance of this far-reaching change in two joint statements (ESSDC meeting minutes, 2021 and 2017). They have called for a coherent set of policies, initiatives and investments at EU, national and company levels to ensure both that the sector decarbonises in a cost-effective way and that the transition is just for businesses, employees and consumers and does not negatively affect their living and working conditions. Negative impacts, including on the sector's workforce, must be anticipated and prevented,

according to the European social partners. They have called for the creation of new jobs that offer good-quality employment and for comprehensive reskilling programmes for the current workforce. All this requires an effective social dialogue at all levels to support a just transition, as well as exchange of good practices on just transition and retaining talent in the sector.

This transformation in the sector is embedded in the EU's Energy Roadmap 2050 (European Commission, 2012). It has set the strategic goal that by 2050 electricity production will be almost emission-free, while the European electricity system will remain secure, competitive and sustainable in the long term. Increasingly, the production and distribution of renewable electricity will predominate, which will further increase employment and companies' activities in this segment of the sector. Particular locations are expected to profit substantially from the trend towards renewable electricity, with wind energy being produced in the northern seas and the Atlantic Ocean, and wind and solar power being produced the Mediterranean countries, which will benefit from their interconnections with European distribution networks. The roadmap reiterates the significant implications of decarbonisation for workers and jobs, calling for systematic social dialogue to ensure that the challenges are addressed in a sustainable way.

2. National level of representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the electricity sector. This study has identified 106 sector-related trade unions and 48 sector-related employer organisations in the EU27 (Table 10). All countries have at least one sector-related trade union, although the number of organisations per country ranges from one to nine. In 13 Member States there are between one and three trade unions in the electricity sector, while in 14 countries there are at least four trade unions organising workers in the sector. The highest number is registered in Portugal, where there are nine trade unions; France follows with eight. The pluralism of representation of workers in this sector is caused by occupational divides⁹ in 12 countries and by sectoral and ideological differences in 9 Member States. Historical reasons related to differences in the organisational structures of trade union organisations have resulted in pluralism in Bulgaria, Lithuania, Romania and Slovakia, while differences in territorial coverage have caused fragmentation in Belgium, Bulgaria and Spain.

At least one sector-related employer organisation exists in all Member States except Luxembourg. The number of organisations per country varies between one and four. There is only one organisation representing employers in twelve countries. In eight Member States there are two organisations for sector-related employers, while in Estonia, Germany, Italy and Romania the number of employer organisations is three. The highest numbers are registered in Cyprus and the Netherlands, each of which has four. While ideological differences explain the pluralism in the Netherlands, in Cyprus, as well as in Belgium, Estonia, Italy and Slovenia, this is caused by the employer organisations covering different parts of the sector. The reason for pluralism among the sectoral employer organisations in Germany, Greece and Sweden is that they represent member companies of different sizes.

Table 10: Number of electricity sector-related organisations per country

Trade unions						Employer organisations/ business associations				
						3	AT	1		
						4	BE	2		
						4	BG	1		
						4 ¹⁰	CY	4		
						4 ¹¹	CZ	1		
						2	DE	3		
						4	DK ¹²	2		
						3	EE	3		

⁹ The term 'occupational divides' refers to the coverage of different categories of workers within the same sector by different specific trade unions.

¹⁰ The trade union KTMA – which is active in the territory of Cyprus that is not under the effective control of the Government of the Republic of Cyprus – is not counted in the report.

¹¹ In Czechia, the trade union OS UNIOS, which is affiliated to EPSU, has no members in the electricity sector, according to the information collected by the Network of Eurofound Correspondents, and it has not been included in this study.

¹² The Danish employer organisation Tekniq was assessed as not representative for the sector, as it covers electricity installation activities, and none of the activities covered by this report.

Representativeness of the European social partner organisations: Electricity sector

									1 ¹³	EL	2						
									6	ES	1						
									7 ¹⁴	FI	1						
									8	FR	1						
									6	HR	2						
									3	HU	2						
									4	IE	1						
									3	IT	3						
									2	LT	1						
									2	LU	0						
									1	LV	1						
									2	MT	1						
									2	NL	4						
									5	PL	2						
									9 ¹⁵	PT	1						
									7	RO	3						
									7 ¹⁶	SE	2						
									1	SI	2						
									2	SK	1						
									106	EU27	48						

Source: Network of Eurofound Correspondents, 2020

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

Of the 106 sector-related trade unions in the EU Member States, 99 organise workers in the production of electricity, 82 organise workers in transmission, 88 organise workers in distribution and 83 organise workers in trade (Table 11). A total of 67 trade unions organise workers in the public sector and 83 organise workers in the private sector. Of the 106 trade unions, 87 are involved in single-employer collective bargaining, while only 49 are involved in multi-employer collective bargaining.

¹³ The Greek trade union PEF/PEMO, which is affiliated to IndustriAll Europe, had no members in the electricity sector when the data for this report were collected. However, as a result of the expansion of the business portfolios of the gas distribution and trading companies in the country to include activities in trade of electricity, PEF/PEMO, which represents mainly workers in the natural gas and oil industries, is working towards representing workers in the entire energy sector, including trade of electricity, according to Eurofound's national correspondent.

¹⁴ The Finnish Union of Professional Engineers, an IndustriAll Europe member, did not reply to the Eurofound correspondent's queries, and there are no data on its role in the sector; therefore, it is not counted as a sector-related trade union in this report.

¹⁵ The Portuguese trade union SIMA, an IndustriAll Europe member, has not been included as a sector-related trade union, as, according to the registers of collective agreements of the Portuguese Ministry of Labour, the trade union represents workers in the manufacturing of electric and electronic products, and not in the electricity sector as it is defined in this report.

¹⁶ In Sweden, the trade union ST represents no workers in the parts of the sector covered by report, only white-collar workers in authorities that handle energy issues, such as the Swedish Energy Agency, according to the information collected by the Network of Eurofound Correspondents.

Additionally, 69 of the trade unions are consulted by their governments on working conditions, and 42 are involved in tripartite social dialogue bodies, while 39 are involved in bipartite social dialogue (see Table 14).

Table 11: Trade union coverage of parts of the sector and involvement in collective bargaining

	NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public sector	Private sector	MEB	SEB
Number and share of trade unions out of 106 in the EU	99 (93%)	82 (77%)	88 (83%)	83 (78%)	67 (63%)	83 (78%)	49 (46%)	87 (82%)
Number of Member States with at least one trade union	27	27	27	27	22	24	14	27

Note: MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

With no exceptions, all NACE codes are covered by at least one organisation in every Member State. As shown in Table 12, more than half of the trade unions included in the current study cover all the parts of the electricity sector under NACE 35.1. Specifically, there are 70 trade unions (66%) that cover, either exclusively or in addition to parts of other sectors (most commonly gas, heating or mining), the production, transmission, distribution and trade of electricity.

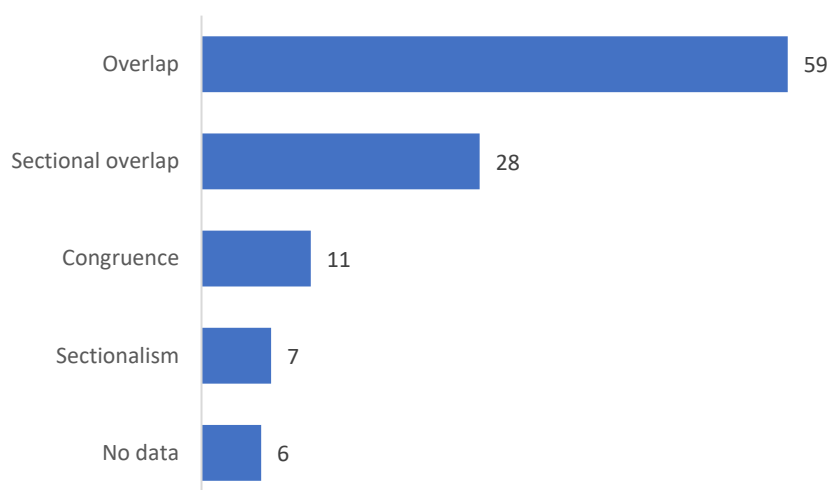
Table 12: Breadth of trade union coverage of the sector (0–4 sectors)

	0	1	2	3	4 (full coverage)
Number and share of trade unions out of 106 in the EU	6 (6%)	14 (13%)	5 (5%)	16 (14%)	70 (63%)

Source: Network of Eurofound Correspondents, 2020

Of the 70, 10 cover only the electricity sector and thus have a congruent membership domain, and 59 cover workers in the entire electricity sector as well as other sectors, and thus have an overlapping membership domain (Figure 13 and Table 13). Only 35 (33%) of the trade unions analysed in the study cover only a part of the electricity sector, of which 28 (26%) organise workers in a part of the electricity sector as well as in other sectors and are thus have a sectional overlap domain pattern. The smallest category, sectionalism, is made up of the remaining 9 trade unions (8%), which organise workers in only some parts of the electricity sector and in no other sectors. There are an additional 6 trade unions that were not included in the current analysis of domain coverage as there were no data available on their coverage.

Figure 13: Domain coverage of trade unions in the electricity sector (number)



Source: Network of Eurofound Correspondents, 2020

Table 13: Membership domain patterns of trade unions in the electricity sector

	Congruence	Sectionalism	Overlap	Sectional overlap	No data
AT			GPA-djp yunion	<i>PRO-GE</i>	
BE			ABVV-FGTB Gazelco (ACOD-CGSP) <i>ACV-CSC BIE</i> <i>ACV-CSC CNE</i> <i>ACLVB-CGSLB</i>		
BG		<i>ΦΑΕ-Подкрепа/</i> <i>FNE-Podkrepa</i>	ΗΦΕ/NFEW НСФЕБ/ITUFWEI <i>ΦΕ-Подкрепа/</i> <i>FE-Podkrepa</i>		
CY	ΕΠΟΠΑΗ-ΟΗΟ-ΣΕΚ/ΕΡΟΡΑΙ-ΟΗΟ-ΣΕΚ	ΣΕΠΑΗΚ/ΣΕΡΑΙΚ ΣΥΒΑΗΚ/ΣΙΒΑΙΚ	ΣΗΔΗΚΕΚ-ΠΕΟ/ SIDIKEK-PEO		KTMAS ¹⁷
CZ			OS ECHO OSEH	SOSE ČOSE	OS UNIOS ¹⁸
DE				ver.di <i>IGBCE</i>	

¹⁷ KTMAS is not included in the report, as explained in Table 10.

¹⁸ OS UNIOS has no members in the electricity sector and is not included in the report, as explained in Table 10.

Representativeness of the European social partner organisations: Electricity sector

	Congruence	Sectionalism	Overlap	Sectional overlap	No data
DK			<i>Dansk Metal</i> <i>IDA</i>	<i>DEF</i> <i>3F</i>	
EE			EEAÜL/AEEWTU	KESA NEAÜ	
EL			ΓΕΝΟΠ/ΔΕΗ- ΚΗΕ/GENOP/DEI- ΚΗΕ ¹⁹		<i>PEF/PEMO</i> ²⁰
ES			<i>FI-USO</i> <i>(Sector Energía)</i> UGT-FICA <i>CCOO – Industria</i> SIE ATYPE-CC ELA ²¹		
FI			KTK <i>Pro</i> YTN <i>TEK Academic</i> <i>Engineers</i> ²²	JHL <i>Sähköliitto</i> Finnish Engineers' Association	<i>Union of</i> <i>Professional</i> <i>Engineers</i> ²³
FR	SUD Energies	Interco-CFDT	CFE-CGC Energies FNEM-FO FNME-CGT <i>CFTC-CMTE</i> <i>FCE-CFDT</i> <i>UNSA Energie</i>		
HR	TEHNOS		HES NSRHEP <i>EKN-HR</i>	HEDISS <i>SSKH</i>	
HU			EVDSZ	<i>BDSZ</i>	

¹⁹ ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ/GENOP/DEI-ΚΗΕ's affiliation to EPSU was not confirmed by the trade union's representative.

²⁰ PEF/PEMO is not included in the report, as explained in Table 10. As a result of the expansion of the business portfolio of the gas distribution and trading companies in the country into activities in trade of electricity, PEF/PEMO, which represents mainly workers in the natural gas and oil industries, is working towards representing workers in the entire energy sector, including trade of electricity.

²¹ ELA's affiliation to EPSU was not confirmed by the trade union's representative.

²² TEK Academic Engineers is part of YTN; it has been included as a separate trade union because it directly organises engineers in the sector, while YTN is a federation representing trade unions, rather than workers.

²³ The Union of Professional Engineers is not included in the report, as explained in Table 10.

Representativeness of the European social partner organisations: Electricity sector

	Congruence	Sectionalism	Overlap	Sectional overlap	No data
				VDSZ	
IE	ESU		Unite	SIPTU <i>Connect</i>	
IT	FLAEI CISL RETI		FILCTEM-CGIL <i>UILTEC UIL</i>		
LT			LPPSF/LITUF	<i>LEPS Solidarumas</i>	
LU			OGB-L²⁴ <i>LCGB</i>		
LV			LAB Energija		
MT			GWU	EPOU	
NL	CNV Publieke Diensten		FNV Publiek Belang		
PL	ZZZE	<i>SKEE</i>	ZZiT	<i>SKE NSZZ Solidarność</i> <i>OZZZPRC</i>	
PT	Sinergia	FE Sirep SISE	Sindiel <i>Fiequimetal</i> Fetese Asosi SIEAP		<i>SIMA²⁵</i>
RO		<i>SHH</i>	Univers <i>UFS Atlas</i>	FSLI Energetica FNME <i>FSLI Petrol-Energie</i> Sindicatul Muntele	
SE	<i>Sveriges Ingenjörer</i> Elektrikerna		Kommunal Vision SEKO <i>Unionen</i> Ledarna		ST²⁶
SI			SDE		

²⁴ OGB-L is indirectly affiliated to EPSU.

²⁵ SIMA is not included in the report, as explained in Table 10.

²⁶ ST is not included in the report, as explained in Table 10.

Representativeness of the European social partner organisations: Electricity sector

	Congruence	Sectionalism	Overlap	Sectional overlap	No data
SK				<i>ECHOZ</i> ZOES	
EU27	10	9	59	28	6

Note: Trade unions marked in bold are affiliated to EPSU; trade unions marked in italics are affiliated to IndustriAll Europe.

Source: Network of Eurofound Correspondents, 2020

Table 14: Sector coverage of trade unions in the electricity sector

	Trade union	EU-level affiliation			Parts of the sector organised						Involvement in social dialogue bodies		Involvement in consultation on working conditions	Involvement in CB	
		IndustriAll Europe	EPSU	Other	35.11	35.12	35.13	35.14	Public	Private	Bipartite	Tripartite		MEB	SEB
AT	GPA-djp			UNI Europa, ETF, EFFAT, EFJ									Ad hoc		
AT	younion			ETF, UNI Europa, EFJ, IFSW Europe, Eurofedop									Regular		
AT	PRO-GE			EFFAT									Regular		
BE	ABVV-FGTB												Regular		
	Gazelco (ACOD-CGSP)												Regular		
BE	ACV-CSC BIE												Regular		
BE	ACV-CSC CNE												Regular		
BE	ACLVB-CGSLB												Regular		
BG	НФЕ/НFEW												Both		
BG	НСФЕБ/ ITUFWEI												Both		
BG	ФЕ-Подкрепа/ FE-Podkrepa												Both		
BG	ФАЕ-Подкрепа/ FNE-Podkrepa												Both	²⁷	
CY	ΕΠΟΠΑΝ-ΟΗΟ-ΣΕΚ/ ΕΡΟΡΑΙ-ΟΗΟ-ΣΕΚ		Via ΟΗΟ									n.d.	Ad hoc		
CY	ΣΗΔΗΚΕΚ-ΠΕΟ/ ΣΙΔΙΚΕΚ-ΠΕΟ											n.d.	Ad hoc		
CY	ΣΕΠΑΗΚ/										n.d.	n.d.	Ad hoc		

²⁷ The trade union is officially involved in sectoral bargaining, but in fact it negotiates only with the company when it is involved in bargaining.

Representativeness of the European social partner organisations: Electricity sector

	Trade union	EU-level affiliation			Parts of the sector organised						Involvement in social dialogue bodies		Involvement in consultation on working conditions	Involvement in CB	
		IndustriAll Europe	EPSU	Other	35.11	35.12	35.13	35.14	Public	Private	Bipartite	Tripartite		MEB	SEB
	SEPAIK														
CY	ΣΥΒΑΗΚ/ ΣΙΒΑΙΚ										n.d.	n.d.	Ad hoc		
CZ	OS ECHO												Ad hoc		
CZ	SOSE												Ad hoc		
CZ	ČOSE												Regular		
CZ	OSEH												Ad hoc		
DE	ver.di			UNI Europa									Ad hoc		
DE	IGBCE												Ad hoc		
DK	DEF	Via CO-industri											Regular		
DK	3F	Via CO-industri											Regular		
DK	Dansk Metal	Via CO-industri											Regular		
DK	IDA												Ad hoc		
EE	EEAÜL/ AEEWTU			Public Services International									Ad hoc		
EE	KESA												Regular		
EE	NEAÜ												Ad hoc		
EL	ΓΕΝΟΠ/ΔΕΗ- ΚΗΕ/ GENOP/DEI-KHE		²⁸										Ad hoc		
ES	FI-USO (Sector Energía)												Regular		
ES	UGT-FICA			EFFAT, FETCM									Ad hoc		

²⁸ ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ/GENOP/DEI-KHE's affiliation to EPSU was not confirmed by the trade union's representative.

Representativeness of the European social partner organisations: Electricity sector

	Trade union	EU-level affiliation			Parts of the sector organised						Involvement in social dialogue bodies		Involvement in consultation on working conditions	Involvement in CB	
		IndustriAll Europe	EPSU	Other	35.11	35.12	35.13	35.14	Public	Private	Bipartite	Tripartite		MEB	SEB
ES	CCOO – Industria												Ad hoc		
ES	SIE														
ES	ATYPE-CC			CEC European Managers											
ES	ELA		²⁹	ETUC	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.					
FI	JHL												Ad hoc		
FI	Sähköliitto												Ad hoc		
FI	KTK														
FI	Finnish Engineers' Association														
FI	Pro														
FI	YTN ³⁰												Yes		
FI	TEK Academic Engineers												Ad hoc		via YTN
FR	CFE-CGC Energies			FECER									Both		
FR	Interco-CFDT														
FR	FNEM-FO												Both		
FR	FNME-CGT												Both		
FR	CFTC-CMTE														
FR	FCE-CFDT												Both		

²⁹ ELA's affiliation to EPSU was not confirmed by the trade union's representative.

³⁰ YTN is the collective bargaining organisation of AKAVA for the private sector.

Representativeness of the European social partner organisations: Electricity sector

	Trade union	EU-level affiliation			Parts of the sector organised						Involvement in social dialogue bodies		Involvement in consultation on working conditions	Involvement in CB	
		IndustriAll Europe	EPSU	Other	35.11	35.12	35.13	35.14	Public	Private	Bipartite	Tripartite		MEB	SEB
FR	UNSA Energie	Via UNSA Industry and Construction													
FR	SUD Energies														
HR	HES			PSI											
HR	NSRHEP			PSI											
HR	TEHNOS														
HR	HEDISS														
HR	EKN-HR	Via UATUC ³¹												32	
HR	SSKH	Via UATUC													
HU	EVDSZ												Ad hoc		
HU	BDSZ			ETUC via ESZSZ									Ad hoc		
HU	VDSZ			ETUC											
IE	SIPTU												Ad hoc		
IE	Unite												Ad hoc		
IE	ESU												Ad hoc		
IE	Connect												Ad hoc		
IT	FILCTEM-CGIL												Ad hoc		
IT	FLAEI CISL RETI												Ad hoc		

³¹ UATUC is a cross-industry organisation in Croatia, and therefore not included in this study; the sector-related trade union organisations EKN-HR and SSKH are included due to their sector-relatedness. Their affiliation to IndustriAll Europe is indirect, via UATUC.

³² While EKN-HR is not involved in collective bargaining in the electricity sector, it undertakes collective bargaining for employees in other sectors.

Representativeness of the European social partner organisations: Electricity sector

	Trade union	EU-level affiliation			Parts of the sector organised						Involvement in social dialogue bodies		Involvement in consultation on working conditions	Involvement in CB	
		IndustriAll Europe	EPSU	Other	35.11	35.12	35.13	35.14	Public	Private	Bipartite	Tripartite		MEB	SEB
IT	UILTEC UIL												Ad hoc		
LT	LPPSF/LITUF										n.d.	n.d.	Ad hoc		
LT	LEPS Solidarumas										n.d.	n.d.	Ad hoc		
LU	OGB-L			UNI Europa											
LU	LCGB			UNI Europa											
LV	LAB Energija			PSI									Regular		
MT	GWU			ETUC, ETUI									Regular		
MT	EPOU														
NL	FNV Publiek Belang												Regular		
NL	CNV Publieke Diensten			EUCDW									Regular		
PL	SKE NSZZ Solidarność	Via SGiE NSZZ Solidarność											Regular		
PL	SKEE	Via SGiE NSZZ Solidarność											Regular		
PL	ZZZE												Regular		
PL	ZZiT												Regular		
PL	OZZZPRC												Regular		
PT	Sindel														
PT	Fiequimetal												n.d.		
PT	Fetese														
PT	FE														
PT	Sirep					n.d.					n.d.	n.d.	n.d.		

Representativeness of the European social partner organisations: Electricity sector

	Trade union	EU-level affiliation			Parts of the sector organised						Involvement in social dialogue bodies		Involvement in consultation on working conditions	Involvement in CB	
		IndustriAll Europe	EPSU	Other	35.11	35.12	35.13	35.14	Public	Private	Bipartite	Tripartite		MEB	SEB
PT	SISE					n.d.					n.d.	n.d.	n.d.		
PT	Sinergia														
PT	Asosi														
PT	SIEAP												Ad hoc		
RO	Univers										Via BNS	n.d.			
RO	FSLI Energetica								n.d.	n.d.			Regular		
RO	FNME	33											Ad hoc		
RO	UFS Atlas												Both		
RO	FSLI Petrol-Energie ³⁴												Both		
RO	SHH								n.d.	n.d.					
RO	Sindicatul Muntele														
SE	Kommunal														
SE	Vision														
SE	SEKO			LO									Ad hoc		
SE	Sveriges Ingenjörer												Regular		
SE	Unionen			Youelectric											
SE	Elektrikerna			LO									Ad hoc		

³³ FNME's affiliation to IndustriAll was suspended at the time of data collection (2020).

³⁴ FSLI's president claimed that the trade union had no members in the sector. However, the information submitted in 2019 by FSLI Petrol-Energie to the Romanian Ministry of Labour clearly indicates that it does have members in the sector.

Representativeness of the European social partner organisations: Electricity sector

	Trade union	EU-level affiliation			Parts of the sector organised						Involvement in social dialogue bodies		Involvement in consultation on working conditions	Involvement in CB	
		IndustriAll Europe	EPSU	Other	35.11	35.12	35.13	35.14	Public	Private	Bipartite	Tripartite		MEB	SEB
SE	Ledarna														
SI	SDE			RETSEE (RETUN SEE)									Regular	Indirectly	
SK	ECHOZ														
SK	ZOEZ														
EU27	106														

Notes: Orange shading indicates affiliation to a European-level social partner, yellow shading indicates indirect affiliation and red shading indicates a European-level affiliation that was not confirmed by the national trade union's representative; green shading indicates coverage of parts of the sector; purple shading indicates involvement in social dialogue bodies and collective bargaining. CB, collective bargaining; MEB, multi-employer bargaining; n.d., no data available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

An important aspect of the organisations representing workers in the electricity sector at national level is their membership strength. Table 15 examines the organisational density of the trade unions included in this study by looking at the number of employees in the electricity sector represented by the 106 trade unions and calculating their share in the total national workforce in the electricity sector.

Table 15: Organisational density of trade unions in the electricity sector

	Number of employees in the electricity sector	Number of trade unions covered by data	Number of members of trade unions covered by data in the sector	Density based on trade unions covered by data (%)
EU27	814,873	90 out of 106	284,852	35
AT	23,808	3 out of 3	17,729	74
BE	15,000	4 out of 4	1,500	10
BG	26,532	4 out of 4	11,909	45
CY	2,000	4 out of 4	1,700	85
CZ	32,400	5 out of 4	11,616	36
DE	203,861	0 out of 2	n.d.	n.d.
DK	7,490	4 out of 4	2,518	34
EE	3,420	3 out of 3	1,900	56
EL	24,409	2 out of 1	1,400	6
ES	32,680	3 out of 6	10,760	33
FI	10,200	4 out of 7	8,570	84
FR	125,142	3 out of 8	43,900	35
HR	11,782	6 out of 6	8,610	73
HU	13,768	3 out of 3	10,143	74
IE	10,000	4 out of 4	5,380	54
IT	57,946	2 out of 3	23,100	40
LT	5,500	1 out of 2	300	5
LU	1,250	2 out of 2	812	65
LV	5,277	1 out of 1	2,700	51
MT	910	2 out of 2	601	66
NL	27,000	2 out of 2	5,400	20
PL	71,543	4 out of 5	37,201	52
PT	12,500	4 out of 9	6,771	54
RO	46,262	6 out of 7	35,438	77
SE	27,293	7 out of 7	23,594	86
SI	6,577	1 out of 1	6,500	99
SK	10,323	2 out of 2	4,800	46

Notes: Where precise data were not available, estimates provided by the Network of Eurofound Correspondents were used. For Sweden, data for NACE 35 (electricity, gas, steam and air conditioning supply activities) were used for the total number of employees, as data for NACE 35.1 (the electricity sector only) were not available. For Slovenia, the number of trade union members probably relates to NACE 35 rather than NACE 35.1. Green shading has been used to indicate density of 35% or higher (35% is the EU average). n.d., no data available.

Source: Network of Eurofound Correspondents, 2020

In more than half of the Member States (15) the proportion of sectoral employees represented by a trade union is higher than 50%, according to the available data. Despite the lack of availability of membership figures for some trade unions in some countries (Cyprus, Finland, France, Italy, Lithuania Poland, Portugal, Romania and Spain), it is clear that the employees in this sector have a very good level of representation and that the trade unions for which data could be collected have a significant degree of coverage of the sectoral workforce in their countries. No data were available for the number of workers affiliated to the two trade unions in Germany.

Involvement of sectoral trade unions in collective bargaining

This section discusses the involvement of the trade unions included in this study in collective bargaining. Of the 106 trade unions in the EU Member States, 101 are involved in collective bargaining in the electricity sector: 85 are directly involved in SEB, 3 are indirectly involved in single-employer bargaining, either through their members or through a national affiliation (namely TEK Academic Engineers in Finland, UFS Atlas in Romania and SDE in Slovenia), and 48 are engaged in multi-employer bargaining (Table 16).

Table 16: Involvement of trade unions in the electricity sector in collective bargaining

	% covered by MEB and SEB	% covered by MEB	Trade union	European-level affiliation	Any CB	MEB	SEB	WCC
AT	100	> 70	GPA-djp	IndustriAll Europe, EPSU, UNI Europa, ETF, EFFAT, EFJ				Ad hoc
			younion	EPSU, ETF, UNI Europa, EFJ, IFSW Europe, Eurofedop				Regular
			PRO-GE	IndustriAll Europe, EFFAT				Regular
BE	100	1	ABVV-FGTB Gazelco (ACOD-CGSP)	EPSU				Regular
			ACV-CSC BIE	IndustriAll Europe				Regular
			ACV-CSC CNE	IndustriAll Europe				Regular
			ACLVB-CGSLB	IndustriAll Europe				Regular
BG	< 60	50	НФЕ/NFEW	EPSU				Both
			НСФЕБ/ITUFWEI	EPSU				Both
			ФЕ-Подкрепа/ FE-Podkrepa	IndustriAll Europe				Both
			ФАЕ-Подкрепа/ FNE-Podkrepa	IndustriAll Europe				Both
CY	95	No MEB	ΕΡΟΡΑΙ-ΟΗΟ SEK	IndustriAll Europe, EPSU				Ad hoc
			ΣΗΔΗΚΕΚ-ΠΕΟ/ SIDIKEK-PEO					Ad hoc
			ΣΕΠΑΗΚ/ΣΕΡΑΙΚ					Ad hoc
			ΣΥΒΑΗΚ/SIVAİK					Ad hoc
CZ	60–75	60–75	OS ECHO	IndustriAll Europe, EPSU				Ad hoc
			SOSE	EPSU				Ad hoc
			ČOSE					Regular
			OSEH					Ad hoc
DE	~90	~90	ver.di	EPSU, UNI Europa				Ad hoc
			IGBCE	IndustriAll Europe				Ad hoc
DK	~80–85	~80–85	DEF	IndustriAll Europe				Regular
			3F	IndustriAll Europe				Regular

Representativeness of the European social partner organisations: Electricity sector

	% covered by MEB and SEB	% covered by MEB	Trade union	European-level affiliation	Any CB	MEB	SEB	WCC
			Dansk Metal	IndustriAll Europe				Regular
			IDA	IndustriAll Europe				Ad hoc
EE	43	No MEB	EEAÜL/AEEWTU	IndustriAll Europe, EPSU, Public Services International				Ad hoc
			KESA					Regular
			NEAÜ					Ad hoc
EL	40–50	No MEB	ΓΕΝΟΠ/ΔΕΗ-KHE/GENOP/DEI-KHE	Affiliation to EPSU not confirmed				Ad hoc
ES	~90	No MEB	FI-USO (Sector Energía)	IndustriAll Europe				Regular
			UGT-FICA	IndustriAll Europe, EPSU, EFFAT, FETCM				Ad hoc
			CCOO – Industria	IndustriAll Europe				Ad hoc
			SIE					
			ATYPE-CC	CEC – European Managers				
			ELA	IndustriAll Europe, EPSU, ³⁵ ETUC				
FI	100	100	JHL	EPSU				Ad hoc
			Sähköliitto	IndustriAll Europe				Ad hoc
			KTK					
			Finnish Engineers' Association					
			Pro	IndustriAll Europe				n.d.
			YTN					Both
			TEK Academic Engineers	IndustriAll Europe				Ad hoc
FR	100	100	CFE-CGC Energies	IndustriAll Europe, EPSU, FECER				Both
			Interco-CFDT	IndustriAll Europe, EPSU				
			FNEM-FO	IndustriAll Europe, EPSU				Both
			FNME-CGT	IndustriAll Europe, EPSU				Both
			CFTC-CMTE	IndustriAll Europe				
			FCE-CFDT	IndustriAll Europe				Both
			UNSA Energie	IndustriAll Europe				
			SUD Energies					
HR	98	No MEB	HES	EPSU, PSI				
			NSRHEP	EPSU, PSI				
			TEHNOS					
			HEDISS					
			EKN-HR	IndustriAll Europe				
			SSKH	IndustriAll Europe				
HU	100	~75	EVDSZ	IndustriAll Europe, EPSU				Ad hoc
			BDSZ	IndustriAll Europe, ETUC via ESZSZ				Ad hoc
			VDSZ	IndustriAll Europe, ETUC				

³⁵ ELA's affiliation to EPSU was not confirmed by the trade union's representative.

Representativeness of the European social partner organisations: Electricity sector

	% covered by MEB and SEB	% covered by MEB	Trade union	European-level affiliation	Any CB	MEB	SEB	WCC
IE	80	No MEB	SIPTU	IndustriAll Europe, EPSU				Ad hoc
			Unite	IndustriAll Europe, EPSU				Ad hoc
			ESU	EPSU				Ad hoc
			Connect	IndustriAll Europe				Ad hoc
IT	100	100	FILCTEM-CGIL	IndustriAll Europe, EPSU				Ad hoc
			FLAEI CISL RETI	IndustriAll Europe, EPSU				Ad hoc
			UILTEC UIL	IndustriAll Europe				Ad hoc
LT	50	No MEB	LPPSF/LITUF	IndustriAll Europe, EPSU				Ad hoc
			LEPS Solidarumas	IndustriAll Europe				Ad hoc
LU	85–90	No MEB	OGB-L	IndustriAll Europe, EPSU, UNI Europa				
			LCGB	IndustriAll Europe, UNI Europa				
LV	85–90	No MEB	LAB Energija	EPSU, PSI				Regular
MT	85	No MEB	GWU	IndustriAll Europe, EPSU, ETUC, ETUI				Regular
			EPOU					
NL	~100	~100	FNV Publiek Belang	IndustriAll Europe, EPSU				Regular
			CNV Publieke Diensten	EUCDW				Regular
PL	100	90 ³⁶	SKE NSZZ Solidarność	IndustriAll Europe				Regular
			SKEE	IndustriAll Europe				Regular
			ZZZE					Regular
			ZZIT					Regular
			OZZZPRC					Regular
PT	~60	No MEB	Sindiel	IndustriAll Europe, EPSU				
			Fiequimetal	IndustriAll Europe				n.d.
			Fetese					
			FE					
			Sirep					n.d.
			SISE					n.d.
			Sinergia					
			Asosi					
			SIEAP					Ad hoc
RO	~85	No MEB	Univers	EPSU				
			FSLI Energetica					Regular
			FNME					Ad hoc
			UFS Atlas	IndustriAll Europe				Both
			FSLI Petrol-Energie	IndustriAll Europe				Both
			SHH	IndustriAll Europe				

³⁶ A previous multi-employer collective agreement for the power industry sector is no longer in force, as its signatories on the employers' side (ZPEC and ZPE, as noted in the previous representativeness study on the sector (Eurofound, 2014)) have been closed down. Currently, negotiations on a new multi-employer collective agreement for employees in the power industry are ongoing.

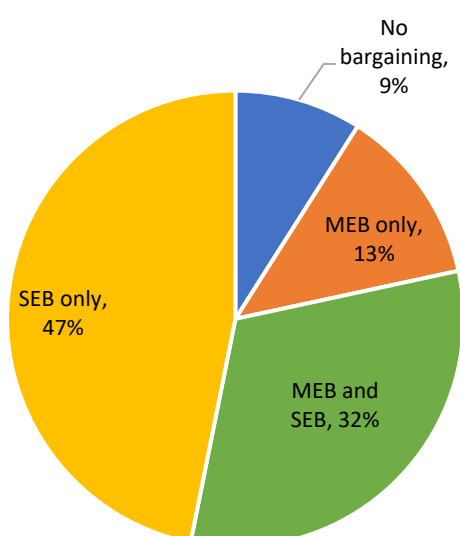
	% covered by MEB and SEB	% covered by MEB	Trade union	European-level affiliation	Any CB	MEB	SEB	WCC
			Sindicatul Muntele					
SE	~90	~90	Kommunal	EPSU				
			Vision	EPSU				
			SEKO	EPSU, LO				Ad hoc
			Sveriges Ingenjörer	IndustriAll Europe				Regular
			Unionen	IndustriAll Europe, Youelectric				
			Elektrikerna	LO				Ad hoc
			Ledarna					
SI	~95	~95	SDE	EPSU, RETSEE (RETUN SEE)				Regular
SK	100	~75	ECHOZ	IndustriAll Europe, EPSU				
			ZOEZ					
EU27			106		101	48	88	69

Note: CB, collective bargaining; MEB, multi-employer bargaining; n.d., no data available; SEB, single-employer bargaining; WCC, consultation on working conditions.

Source: Network of Eurofound Correspondents, 2020

Figure 14 shows that almost all of the trade unions identified in this study – 101 (95%) – are involved in a form of collective bargaining in their countries. There are only five trade unions (5%) that do not engage in any type of collective bargaining; these unions are in Croatia, Denmark, Finland and Spain. Thirteen trade unions (12%) engage directly in multi-employer bargaining but not in single-employer bargaining. A total of 35 (33%) trade unions are involved in both single- and multi-employer bargaining (the only trade union from Slovenia is involved indirectly in sectoral bargaining through its affiliation at national level), and the largest share of trade unions – 53 (50%) – are involved in single-employer bargaining only.

Figure 14: Involvement of trade unions in collective bargaining



Note: MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

2.2. Coverage, sector-relatedness and organisational density of employer organisations

The study identified 48 organisations representing employers in the electricity sector at national level in the EU. Luxembourg is the only Member State in which there is no organisation representing employers in the electricity sector. In terms of sectoral coverage, the employer organisations included in this report represent mostly companies active in production, distribution and trade of electricity, and to a smaller extent those in transmission (Table 17). The number of the 48 employer organisations in the electricity sector representing private sector companies (40) is almost double that representing public sector companies (22). Only 20 of the 48 organisations are involved in sector-related collective bargaining and 4 employer organisations, from Bulgaria, Croatia, Germany and Italy, are involved in single-employer bargaining.

Table 17: Employer organisation coverage of parts of the sector and involvement in collective bargaining

	NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public sector	Private sector	MEB	SEB
Number and share of employer organisations out of 48 in the EU	42 (88%)	34 (71%)	39 (81%)	39 (81%)	22 (46%)	40 (83%)	20 (42%)	4 (8%)
Number of Member States with at least one employer organisation	25	24	26	26	19	24	15	4

Note: MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

Table 18: Breadth of employer organisation coverage of the sector (0–4 sectors)

	0	1	2	3	4 (full)	n.d.
Number and share of employer organisations out of 48 in the EU	1 (2%)	4 (8%)	3 (6%)	8 (17%)	30 (63%)	3 (6%)

Source: Network of Eurofound Correspondents, 2020

As noted, Luxembourg has no employer organisation for companies in the electricity sector. In Croatia, the Croatian Chamber of Economy, included in this study because it is a Eurelectric affiliate, does not cover companies in any part of the sector as defined in the present study. It should be noted that, in addition to the Croatian Chamber of Economy, there is another organisation representing companies in the electricity sector in Croatia. There are four business associations, in Cyprus and Estonia, that cover only one part of the sector, representing companies active exclusively in the production of electricity (Table 18). Three business associations out of the total of 48 organisations represent employers from only two parts of the sector, as defined by the NACE codes. Specifically, two business associations, in Greece and Italy, represent companies in the production and trade of electricity only, while in the Netherlands one business association represents companies active solely in the transmission and distribution of electricity. Eight organisations in seven Member States cover three parts of the sector, and companies active in transmission of electricity are not represented by five out of these eight organisations. There are only three Member States (aside from Luxembourg) in which no employer organisation represents companies active in all the parts of the sector: Croatia, Greece

and Italy. In all the 23 other Member States, at least one employer organisation represents companies in production, transmission, distribution and trade of electricity (Table 19).

Table 19: Sector coverage of employer organisations/business associations in the electricity sector

	Employer organisation or business association	EO or BA	European-level affiliation		Parts of the sector organised						Involvement in CB	
			Eurelectric	Other	35.11	35.12	35.13	35.14	Public	Private	MEB	SEB
AT	OEE	EO		Geode								
BE	FEPEG	EO										
BE	Synergrid	EO										
BG	ББКЕ/BBCE	EO										
CY	ΣΕΑΠΕΚ/ΣΕΑΡΕΚ	BA		Solar Power Europe								
CY	ΣΥΠΑΒΙΚ/SYPABIK	BA		EBA								
CY	ΣΑΕΚ/SAEK	BA		European Wind Association								
CY	ΣΣΑΑΗ/SSAAH	BA										
CZ	ČSZE	EO		ISSA, VMET, ZZES								
DE	VAEU	EO		BusinessEurope (via BDA)								
DE	VKA	EO		CEEP (via bvöd), HOSPEEM								
DE	BDEW	BA		Eurogas								
DK	Dansk Energi	BA										
DK	DI	Both		BusinessEurope								
EE	ETL	BA		CEEP								
EE	EPEA	BA										
EE	ETEA	BA		WindEurope								
EL	ΣΕΗΕ/HELAS	BA							n.d.	n.d.		
EL	ΕΣΑΗ/HAIPP	BA										
ES	AELEC	BA		ECOBA								
FI	Energiateollisuus	EO		Geode, Foratom, WindEurope, EHP								

Representativeness of the European social partner organisations: Electricity sector

	Employer organisation or business association	EO or BA	European-level affiliation		Parts of the sector organised						Involvement in CB	
			Eurelectric	Other	35.11	35.12	35.13	35.14	Public	Private	MEB	SEB
FR	UFE	EO		Market Parties Platform								
HR	UE HEP	EO										
HR	Croatian Chamber of Economy ³⁷	n.a.										
HU	VTMSZ	n.d.										
HU	EMT	n.d.			n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
IE	EAI	BA										
IT	Energia Libera	BA										
IT	Elettricità Futura	EO										
IT	Utilitalia	EO										
LT	NLEA	BA										
LU	None											
LV	LEEA	BA										
MT	MEA	EO		CEEP								
NL	Energie Nederland	BA									Via WENB	
NL	Netbeheer Nederland	BA									Via WENB	
NL	NVDE	BA	Via Netbeheer Nederland									
NL	WENB	EO										
PL	PKEE	BA										
PL	ZPEP	EO										
PT	Elecpor	BA										
RO	FP Energetica ³⁸	EO			n.d.	n.d.	n.d.	n.d.	n.d.	n.d.		

³⁷ The Croatian Chamber of Economy does not cover companies active in the electricity sector as it is defined in the current study.

³⁸ No precise data collected on sector coverage. The organisation has not met the national representativeness criteria since 2012.

Representativeness of the European social partner organisations: Electricity sector

	Employer organisation or business association	EO or BA	European-level affiliation		Parts of the sector organised						Involvement in CB	
			Eurelectric	Other	35.11	35.12	35.13	35.14	Public	Private	MEB	SEB
RO	ACUE	EO										Indirectly
RO	IRE	BA										
SE	EFA	EO										
SE	Sobona	EO										
SI	ZDS	EO										
SI	EZS	EO		EU Forum for Energy and Business Information								
SK	ZZES	EO										
EU27	48											

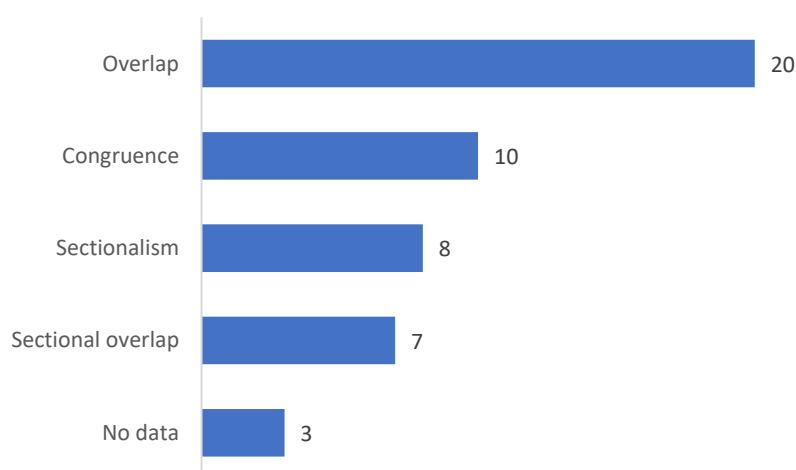
Notes: Orange shading indicates affiliation to a European social partner, and red shading indicates a European-level affiliation that was not confirmed by the national-level organisation's representative; green shading indicates coverage of parts of the sector; purple shading indicates involvement in social dialogue bodies and collective bargaining. BA, business association; CB, collective bargaining; EO, employer organisation; MEB, multi-employer bargaining; n.d., no data available; SEB; single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

Table 20 shows the domain coverage of the employer organisations in the sector. The majority of them (30, or 63%) cover companies operating in all parts of the electricity sector. As Figure 15 illustrates, 10 of these have a congruent membership domain, meaning that they cover all parts of the electricity sector and do not cover parts of other sectors; the other 20 cover all four NACE codes in the electricity sector and parts of other sectors; this domain pattern is called ‘overlapping’, as explained in Section 0.3.

Of the employer organisations in the sector, 15 (31%) cover only a section of the electricity sector, either exclusively or in addition to parts of other sectors, most commonly gas, heating and mining. Of those 15 organisations, 8 represent companies only in part of the electricity sector and in no other sectors and have a sectional membership domain pattern. Another 7 organisations cover companies active in part of the electricity sector and companies in other sectors and are included in the ‘sectional overlap’ category.

Figure 15: Domain coverage of employer organisations/business associations in the electricity sector (number)



Source: Network of Eurofound Correspondents, 2020

Table 20: Membership domain patterns of employer organisations/business associations in the electricity sector

	Congruence	Sectionalism	Overlap	Sectional overlap	No data
AT			OEE		
BE	Synergrid	FEPEG			
BG			ББКЕ/BBCE		
CY	ΣΣΑΑΗ/SSAAH	ΣΑΕΚ/SAEK ΣΥΠΑΒΙΚ/SYPABIK		ΣΕΑΠΕΚ/SEAPEK	
CZ			CZSE		
DE			VAEU VKA BDEW		
DK			Dansk Energi		

Representativeness of the European social partner organisations: Electricity sector

	Congruence	Sectionalism	Overlap	Sectional overlap	No data
			DI		
EE		EPEA	ETEA	ETL	
EL		ΣΕΗΕ/HELAS ΕΣΑΗ/HAIPP			
ES	AELEC				
FI			Energiateollisuus		
FR			UFE		
HR		UP HEP			Croatian Chamber of Economy
HU			VTMSZ		EMT³⁹
IE	EAI				
IT		Elettricità Futura		Energia Libera Utilitalia	
LT			NLEA		
LU	No EO in the sector				
LV			LEEA		
MT			MEA		
NL	Energie Nederland		NVDE ⁴⁰ WENB	Netbeheer Nederland	
PL	PKEE ZPEP Elecpor				
RO	IRE			ACUE	FP Energetica
SE	EFA⁴¹		Sobona		
SI			EZS	ZDS	
SK			ZZES		
EU27	10	8	20	7	3

Note: National organisations affiliated to Eurelectric are in bold.

Source: Network of Eurofound Correspondents, 2020

Below the membership strength (organisational density) of employer organisations in the electricity sector is assessed. In this case, density was assessed by looking at the share of employers in the electricity sector represented by the various organisations identified and the proportion of electricity sector employees working in companies organised by these employer organisations (Table 21).

³⁹ EMT representatives did not confirm the organisation's affiliation to Eurelectric.

⁴⁰ NVDE is affiliated at national level to Netbeheer Nederland and thus indirectly affiliated to Eurelectric.

⁴¹ EFA representatives did not confirm the organisation's affiliation to Eurelectric.

Table 21: Organisational density of employer organisations in the electricity sector

	Total number of companies in the electricity sector	Number of companies covered by employer organisations/ business associations	Proportion of companies represented (%)	Proportion of workforce in organised companies (%)
AT	1,422	139	10	~90
BE	1,392	43	3	> 50
BG	1,353	65	5	< 50
CY	84	81	96	~95
CZ	18,031	38	0	43
DE	69,145	3,336	5	n.d.
DK	1,167	87	7	~95
EE	116	22	19	~90
EL	7,061	38	1	n.d.
ES	14,539	5	0	65
FI	509	258	51	85
FR	3,192	500	16	100
HR	595	13	2	92
HU	534	20	4	75
IE	20	17	85	~90
IT	10,978	696	6	~70
LT	1,252	7	1	~50
LU	76	No employer organisation		
LV	420	55	13	~35
MT	9	7	78	~90
NL	1,800	Probably all; precise data not available	~100	~100
PL	2,846	124	4	~90
PT	4,305	4	0	62
RO	1,038	54	5	~90
SE	1,327	Probably most; precise data not available	~75	~75
SI	1,327	1,127	85	~90
SK	411	5	1	57
EU27	144,949	Approx. 10,000	Approx. 7	

Notes: Where precise data were not available, estimates provided by the Network of Eurofound Correspondents were used. Green shading has been used to indicate density of 50% or greater. n.d., no data available.

Source: Network of Eurofound Correspondents, 2020

Table 21 shows the significant difference between the density of employer organisations and business associations in terms of the proportion of companies that they organise and in terms of the proportion of the workforce that those companies employ. In Finland, Ireland, Malta, Slovenia and Sweden more than half of the companies active in the sector are represented by employer organisations or business associations, and in Cyprus and the Netherlands this is the case for almost all the companies in the

sector. The share of the sectoral workforce employed by organised companies is high in almost all the Member States. Aside from Luxembourg, where there is no organisation representing employers in the electricity sector, and Germany and Greece for which data were not available, only in Bulgaria, Czechia and Latvia is less than 50% of the workforce employed in a company affiliated to an employer organisation or business association. In all other cases, the proportion of the workforce that is employed by an organised company exceeds 50%, reaching 100% or thereabouts in France and the Netherlands. The very high proportion of the electricity workforce that is employed in organised companies indicates that in the sector the larger companies are generally affiliated to employer organisations.

Involvement of sectoral employer organisations in collective bargaining

Of the 48 organisations representing employers, 20 are involved in sectoral collective bargaining. In the Netherlands, 2 employer organisations are involved in multi-employer bargaining through their members. Of the 48 employer organisations, 5 are involved in company-level bargaining, in Bulgaria, Croatia, Germany, Italy and Romania. The Romanian organisation is involved indirectly, through its member companies, and does not sign agreements. Table 22 provides an overview of the organisations' involvement in collective bargaining and consultation on working conditions.

Table 22: Involvement of the national employer organisations in collective bargaining

	Employer organisation or business association	Collective bargaining	Working conditions consultation	EU-level affiliation
AT	OEE	Yes ⁴²	Regular	Eurelectric, Geode
BE	FEPEG	Yes	Regular	Eurelectric
BE	Synergrid	Yes	Regular	
BG	ББКЕ/BBCE	Yes	Both	
CY	ΣΕΑΠΕΚ/ΣΕΑΡΕΚ	No	Both	Solar Power Europe
CY	ΣΥΠΑΒΙΚ/SYPABIK	No	Both	EBA
CY	ΣΑΕΚ/SAEK	No	Ad hoc	European Wind Association
CY	ΣΣΑΑΗ/SSAAH	No	Ad hoc	
CZ	ČSZE	Yes	Ad hoc	Eurelectric, ISSA, VMET, ZZES
DE	VAEU	Yes	None	BusinessEurope (via BDA)
DE	VKA	Yes	Both	CEEP (via bvö), HOSPEEM
DE	BDEW	No	None	Eurelectric, Eurogas
DK	Dansk Energi	No	Regular	Eurelectric
DK	DI	Yes	Regular	BusinessEurope
EE	ETL	No	Regular	Eurelectric, CEEP
EE	EPEA	No	None	
EE	ETEA	No	Ad hoc	WindEurope
EL	ΣΕΗΕ/HELAS	No	None	Eurelectric
EL	ΕΣΑΗ/HAIPP	No	None	
ES	AELEC	No	Ad hoc	Eurelectric, ECOBA
FI	Energiateollisuus	Yes	Ad hoc	Eurelectric, Geode, Foratom, WindEurope, EHP

⁴² In exceptional cases, OEE signs collective agreements on behalf of companies, but it is not itself involved in bargaining.

Representativeness of the European social partner organisations: Electricity sector

FR	UFE	Yes	Both	Eurelectric, Market Parties Platform
HR	UP HEP	Yes	Regular	
HR	Croatian Chamber of Economy	No	None	Eurelectric
HU	VTMSZ	Yes	None	
HU	EMT	No data	None	Affiliation to Eurelectric not confirmed
IE	EAI	No	None	Eurelectric
IT	Energia Libera	Yes	Regular	
IT	Elettricità Futura	Yes	Ad hoc	Eurelectric
IT	Utilitalia	Yes	Ad hoc	
LT	NLEA	No	Ad hoc	Eurelectric
LV	LEEA	No	Ad hoc	Eurelectric
MT	MEA	No	None	CEEP
NL	Energie Nederland	Yes, via WENB	Ad hoc	Eurelectric
NL	Netbeheer Nederland	Yes, via WENB	None	Eurelectric
NL	NVDE	No	Ad hoc	Eurelectric, via Netbeheer
NL	WENB	Yes	Regular	
PL	PKEE*	No	Ad hoc	Eurelectric
PL	ZPEP*	Yes	Regular	
PT	Elecpor*	No	n.d.	Eurelectric
RO	FP Energetica	No	n.d.	
RO	ACUE	Yes, via its members	Both	
RO	IRE	No	Both	Eurelectric
SE	EFA	Yes	Regular	Affiliation to Eurelectric not confirmed
SE	Sobona	Yes	n.d.	
SI	ZDS	No	None	
SI	EZS	Yes	Regular	Eurelectric, EU Forum for Energy and Business Information
SK	ZZES	Yes	Ad hoc	Eurelectric

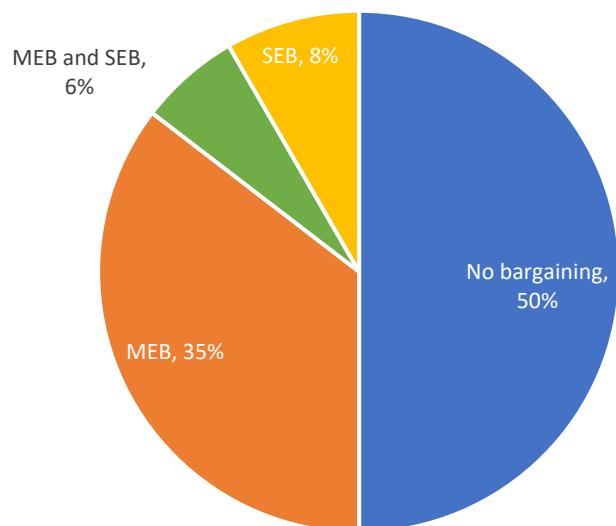
Note: Yellow shading indicates employer organisations that are not involved in collective bargaining but are affiliated to an EU-level organisation; pink shading indicates employer organisations that are neither involved in collective bargaining nor affiliated to an EU-level organisation.

Source: Network of Eurofound Correspondents, 2020

Figure 16 shows that 24 of the employer organisations identified in this study (or 50%) are involved in collective bargaining at national level, which means that the remaining half are not engaged in any type of collective bargaining. None of the organisations is involved in collective bargaining in Cyprus, Greece, Ireland, Latvia, Lithuania, Portugal and Spain. Seventeen organisations are directly engaged in multi-employer bargaining but not in single-employer bargaining, and another two employer organisations, from the Netherlands (Energie Nederland and Netbeheer Nederland), are involved indirectly in sectoral bargaining through their affiliation to WENB. Both single- and multi-employer bargaining takes place in Bulgaria, Germany and Italy, while employer organisations from Croatia and

Romania⁴³ are involved in only single-employer bargaining. Figure 16 shows the proportions of organisations engaging in single- and multi-employer bargaining at national level.

Figure 16: Involvement of employer organisations in collective bargaining (%)



Note: MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

⁴³ In Romania, ACUE is involved indirectly in company-level bargaining through its members.

2.3. Collective bargaining patterns and social dialogue practices

The involvement of social partners in collective bargaining is essential to their ability to influence public policy and the working conditions in a specific sector, as Traxler (2004) shows. This section analyses the collective bargaining undertaken in the electricity sector by the national-level social partners in the EU. Of the trade unions, 95% engage in at least one type of collective bargaining, as do 50% of the employer organisations from the 27 Member States (Table 23).

Only 5 out of the 106 trade unions that represent workers in the electricity sector are not involved in any type of collective bargaining. A total of 13 trade unions, from Austria, Denmark, Finland and Sweden, engage in multi-employer bargaining only, while 35 trade unions from 13 Member States are involved in both multi- and single-employer bargaining on behalf of the workers they represent in the electricity sector.

The picture is different on the employers' side. Of the 48 employer organisations, 24 are not engaged in any form of bargaining. The organisations representing employers in the electricity sector in Cyprus, Greece, Ireland, Lithuania, Latvia, Portugal and Spain are not involved in collective bargaining in the electricity sector. Seventeen organisations are directly engaged in multi-employer bargaining only, and another two employer organisations, from the Netherlands (Energie Nederland and Netbeheer Nederland), are involved indirectly in sectoral bargaining through their affiliation to WENB. The pattern of both multi- and single-employer bargaining is recorded in only three cases among the employer organisations, while two organisations are involved in single-employer bargaining only (in Croatia and Romania; in the case of the latter, ACUE is involved indirectly in company-level bargaining through its members).

Table 23: Collective bargaining in the electricity sector in the EU (number and share of organisations)

	Trade unions					Employer organisations				
No collective bargaining	5 (5%)					24 (50%)				
Multi-employer bargaining only	13 (12%)	48 (45%)	88 (83%)	101 (95%)	106 (100%)	17 (35%)	22 (46%)	7 (15%)	24 (50%)	48 (100%)
Both single- and multi-employer bargaining	35 (33%)					3 (6%)				
Single-employer bargaining only	53 (50%)					6 (8%)				

Source: Network of Eurofound Correspondents, 2020

In Table 24, collective bargaining types are presented for each Member State, illustrating the different national collective bargaining patterns in the electricity sector. Some form of collective bargaining takes place in all 27 Member States. By a small margin, the most common pattern is a mix of single-employer and multi-employer bargaining, which is recorded in 15 Member States. It is important to note that in the Member States in which a combination of the two types of bargaining is recorded, it is not always the same organisation that is involved in both multi- and single-employer bargaining. There are 12 Member States in which organisations representing employers and employees engage in single-employer bargaining only. There are no Member States in which only multi-employer

bargaining occurs in the electricity sector, despite the fact that there are both trade unions and employer organisations that engage in this form of bargaining only, as shown in Table 23.

Table 24: Type of collective bargaining in the electricity sector by Member State

Type of collective bargaining	Member States
Multi-employer bargaining only	No Member States
Single-employer bargaining and multi-employer bargaining	AT, BE, BG, CZ, DE, DK, FI, FR, HU, IT, NL, PL, ⁴⁴ SE, SI, SK
Single-employer bargaining only	CY, EE, EL, ES, HR, IE, LT, LU, LV, MT, PT, RO
No collective bargaining	No Member States

Source: Network of Eurofound Correspondents, 2020

Table 25 provides an illustration of the levels of collective bargaining coverage in the electricity sector in the EU Member States. In most countries, more than half of the sectoral workforce is covered by either single-employer or sectoral bargaining. The lowest rates of coverage are registered in Estonia (43%) and Greece (around 40%), and these relate to company-level bargaining.

Table 25: Collective bargaining coverage by Member State

Type of collective bargaining	Collective bargaining coverage					
	> 95%	75–94%	50–74%	25–49%	1–24%	0%
Multi-employer bargaining only						
Single-employer bargaining and multi-employer bargaining	BE, FI, FR, IT, NL, SI	AT, DE, DK, HU, PL, ⁴⁵ SK	CZ, BG			
Single-employer bargaining only	HR	IE, LU, LV, MT, RO	LT, PT	EE, EL		

Note: No data on collective bargaining coverage are available for Cyprus, Ireland, Spain or Sweden.

Source: Network of Eurofound Correspondents, 2020

2.4. Participation in public policy

In addition to involvement in collective bargaining, the consultation of national-level social partners by their governments on issues related to working conditions is another indicator of their relevance in the sector. Social partners' participation in the making of public policy is well established in some

⁴⁴ In the case of Poland, a previous multi-employer collective agreement for the power industry is no longer in force, as its signatories on the employers' side (ZPEC and ZPE, as noted in the previous representativeness study on the sector (Eurofound, 2014)) have been closed down. Currently, negotiations on a new multi-employer collective agreement for employees in the power industry are ongoing.

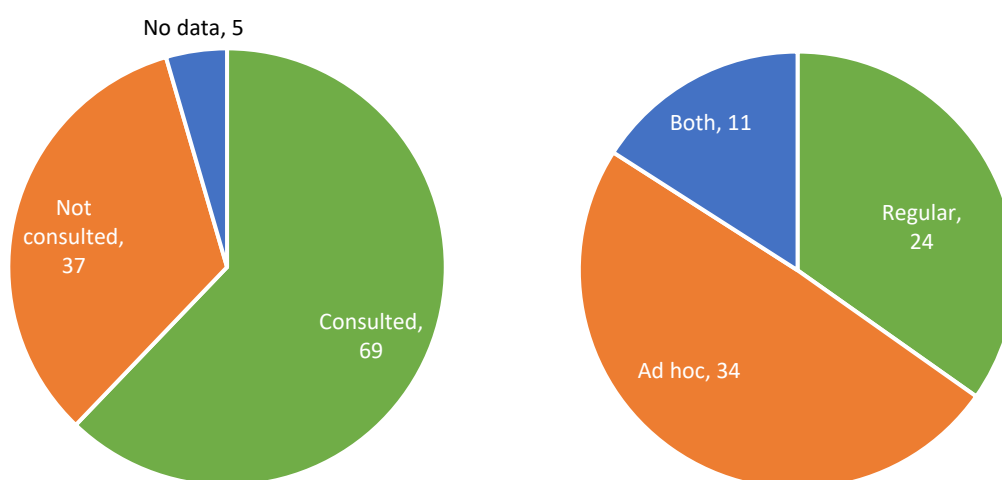
⁴⁵ In the case of Poland, a previous multi-employer collective agreement for the power industry is no longer in force, as its signatories on the employers' side (ZPEC and ZPE, as noted in the previous representativeness study on the sector (Eurofound, 2014)) have been closed down. Currently, negotiations on a new multi-employer collective agreement for employees in the power industry are ongoing.

Member States (mostly in western and northern Europe) and in the process of establishment in others (particularly in central and eastern Europe). This practice may be formalised in tripartite bodies at a central level or maintained in an informal manner.

Trade union and employer organisation consultation

In order to have an overview of the involvement of trade unions in relevant policymaking at national level, their consultation on working conditions in the sector has been assessed. As Figure 17 shows, more than a half of the trade unions covered in this study – 69 (or 62%) – are consulted by their governments, compared with only 37 (33%) which are not. Of the 69 that are consulted, 34 (49%) are involved in these consultations in an ad hoc manner, 24 (35%) on a regular basis and 11 (16%) in both regular and ad hoc settings.

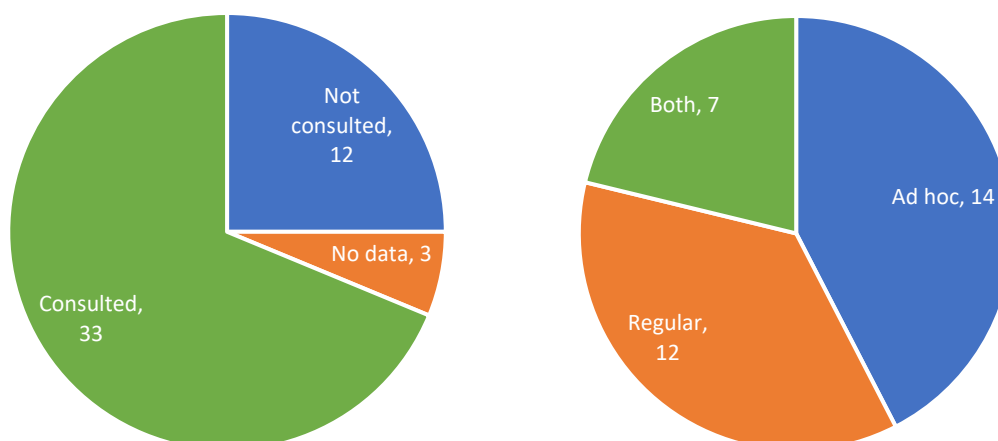
Figure 17: Trade union involvement in consultation (number)



Source: Network of Eurofound Correspondents, 2020

Among the employer organisations, 33 out of 48 are consulted, 12 are not involved in consultation concerning working conditions in the sector and for 3 there is no data available. Of the 33 that are consulted by their governments, 7 contribute on both a regular and an ad hoc basis to the consultations, 14 are involved solely on an ad hoc basis, and 12 take part on a regular basis (Figure 18).

Figure 18: Employer organisation involvement in consultation (number)



Source: Network of Eurofound Correspondents, 2020

Table 26: Consultation of employers and trade unions by Member State

	Trade unions	Employer organisations/ business associations
Consulted	AT, BE, BG, CY, CZ, DE, DK, EE, EL, ES, FI, FR, HU, IE, IT, LT, LV, MT, NL, PL, PT, RO, SE, SI	AT, BE, BG, CY, CZ, DE, DK, EE, ES, FI, FR, HR, IT, LT, LV, NL, PL, RO, SE, SI, SK
Not consulted	HR, LU, SK	EL, HU, IE, MT

Note: Data missing for employer organisations in Portugal; there is no employer organisation in Luxembourg.

Source: Network of Eurofound Correspondents, 2020

As Table 26 shows, none of the six trade unions from Croatia is consulted, and the same is true of the two trade unions from Luxembourg and the two from Slovakia. In all the other Member States, at least one trade union in the sector is consulted. On the employers' side, in Greece, Hungary, Ireland and Malta no employer organisation in the electricity sector is consulted. There are no data for Portugal and there is no employer organisation in Luxembourg. In the remaining 21 Member States, at least one employer organisation is consulted.

Tripartite and bipartite participation bodies

The social partners' involvement in tripartite and/or bipartite bodies in which sector-related topics are dealt with is an indicator of the mutual recognition between trade unions and employer organisations.

In total, in 15 of the Member States there are statutory or mutually agreed sector-related bipartite and/or tripartite bodies (Table 27). It is noteworthy that in most of the remaining 12 countries, in which there are no formal sector-related bodies (Austria, Croatia, Cyprus, Estonia, Germany, Greece, Lithuania, Luxembourg, Malta, Portugal, Spain and Sweden), working groups and other informal settings in which the social partners and the regulating authorities in the sector participate are common.

Table 27: Tripartite and bipartite social dialogue bodies in which sector-related issues are dealt with or in which sector-related social partners are involved

	Social dialogue body ⁴⁶	Bipartite/tripartite		Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
AT	No permanent body exists, but working groups involving ministries, social partners and the regulatory authority are common						
BE	Fonds voor Bestaanszekerheid van het Gas- en Elektriciteitsbedrijf (Assurance Fund for Gas and Electricity Companies)	Bipartite		Social funds	Statutory	ACV-CSC BIE, ACV-CSC CNE, ABVV-FGTB Gazelco (ACOD-CGSP), ACLVB-CGSLB	FEBEG, Synergrid
BE	Fonds voor Aanvullende Vergoedingen (Assurance Fund for Supplementary Payments)	Bipartite		Financing additional payments made available to employees through the fund's joint committee	Statutory	ACV-CSC BIE, ACV-CSC CNE, ABVV-FGTB Gazelco (ACOD-CGSP), ACLVB-CGSLB	FEBEG, Synergrid
BE	Syndicaal Vormingsfonds (Trade Union Training Fund)	Bipartite		Financing of training for trade union activists	Statutory	ACV-CSC BIE, ACV-CSC CNE, ABVV-FGTB Gazelco (ACOD-CGSP), ACLVB-CGSLB	FEBEG, Synergrid
BG	Branch Council for Social Partnership in the Energy Industry		Tripartite	Labour issues, employment, working conditions, health and safety at work, vocational training, social issues, sectoral peculiarities and economic issues	Statutory	НФЕ/NFEW, HCΦEB/ITUFWEI, ΦЕ-Подкрепа/FE-Podkrepa, ΦΑЕ-Подкрепа/FNE-Podkrepa	ББКЕ/BBCE
BG	Council for Social Partnership in the Bulgarian Energy Holding	Bipartite		Promotion of social dialogue, discussions on new investment projects initiated by companies and their social and labour dimensions	Agreement	НФЕ/NFEW, HCΦEB/ITUFWEI, FITUM, NFL Chemical Industry (all affiliated to CITUB), ΦЕ-Подкрепа/FE-Podkrepa, ΦΑЕ-Подкрепа/FNE-Podkrepa, TUFM-Podkrepa, NF	BEH (group of companies)

⁴⁶ The social dialogue bodies listed in this table either focus specifically on the electricity sector or, in some cases, are cross-sectoral bodies that cover the electricity sector and were assessed as relevant by the national correspondents collecting the national-level information.

Representativeness of the European social partner organisations: Electricity sector

	Social dialogue body ⁴⁶	Bipartite/tripartite		Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
						Chemical Industry – Podkrepa (all affiliated to CL-Podkrepa)	
CY	No social dialogue bodies that deal with labour-related issues; two bodies cover only regulatory questions						
CZ	Rada vlády pro energetickou a surovinovou strategii České republiky (Government Council for the Energy and Raw Materials Strategy of the Czech Republic)		Tripartite	Preparation and discussion of conceptual and strategic documents relevant for the economy of Czechia, with a special focus on ensuring the energy and raw materials base for future economic development	Statutory	ČMKOS (peak-level trade union with OS ECHO as a member), ASO ČR (peak-level trade union organisation with ČOSE as a member)	SP ČR (peak-level employer organisation with ČSZE as a member), KZPS ČR, USZ ČR (member of KZPS ČR with direct membership of the council)
DE	No standard social dialogue body						
DK	Branchefælles-skab for Arbejdsmiljø – Industri (Trade Association for the Working Environment – Industry)		Tripartite	The working environment	Statutory	Dansk Metal, 3F, HK Privat, DEF, CO-industri, Fødevareforbundet NNF, Teknisk Landsforbund	DI, Grakom, Medie-arbejdsgiverne, Dansk Mode og Textil, Lederne
DK	Fagligt Udvalg for Elektriker-uddannelsen (Vocational Committee for the Education of Electricians)		Tripartite	Vocational training/education	Statutory	DEF	Tekniq (not included in this study, as noted in Table 10)
DK	Industriens Uddannelser (Vocational Committee for Industrial Education)		Tripartite	Vocational training/education	Statutory	Dansk Metal and 3F Industri representatives form the secretariat with representatives of DI; many more unions and employer organisations participate in the committee	DI

Representativeness of the European social partner organisations: Electricity sector

	Social dialogue body ⁴⁶	Bipartite/tripartite		Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
EE	No standard social dialogue body						
EL	No sector-related permanent body						
ES	No standard social dialogue body						
FI	National Forum for Skills Anticipation		Tripartite	Education: the anticipation groups produce information on the competences, skills and educational needs required for working life in the future	Agreement	Sähköliitto is a deputy member	Energiateollisuus
FI	Branch-specific committee of the Centre for Occupational Safety (part of the Industrial Group)		Tripartite	Safety: the aim is to plan and implement services for the sector that support and promote occupational health and safety in workplaces	No information available	Pro, Sähköliitto, Union of Professional Engineers	Energiateollisuus, Palta
FR	Commission paritaire de branche	Bipartite		Collective bargaining	Agreement	CFE-CGC Energies, FCE-CFDT, FNEM-FO, FNME-CGT	UFE, UNEmIG
FR	Réunion de concertation et de coordination	Bipartite		Social dialogue	Agreement	CFE-CGC Energies, FCE-CFDT, FNEM-FO, FNME-CGT	UFE, UNEmIG
FR	Observatoire de la négociation collective	Bipartite		Annual assessment of collective bargaining	Agreement	CFE-CGC Energies, FCE-CFDT, FNEM-FO, FNME-CGT	UFE, UNEmIG
FR	Commission paritaire nationale pour l’emploi et la formation professionnelle	Bipartite		Vocational training	Agreement	CFE-CGC Energies, FCE-CFDT, FNEM-FO, FNME-CGT	UFE, UNEmIG
FR	Commission supérieure nationale du personnel	Bipartite		Application of <i>Industries électriques et gazières</i> status	Statutory	CFE-CGC Energies, FCE-CFDT, FNEM-FO, FNME-CGT	UFE, UNEmIG
FR	Caisse d’assurance maladie des industries électriques et gazières		Tripartite	Compulsory social security scheme	Statutory	CFE-CGC Energies, FCE-CFDT, FNEM-FO, FNME-CGT	UFE, UNEmIG

Representativeness of the European social partner organisations: Electricity sector

	Social dialogue body ⁴⁶	Bipartite/tripartite		Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
FR	Conseil supérieur de l'énergie		Tripartite	Renewable energy	Statutory	CFE-CGC Energies, FCE-CFD, FNEM-FO, FNME-CGT	UFE, UNEmIG
HR	No sector-related permanent body						
HU	Villamosenergia-ipari Ágazati Párbeszéd Bizottság (Sectoral Social Dialogue Committee for Electric Energy)	Bipartite		Issues affecting the electricity sector	Statutory	EVDSZ, BDSZ	VTMSZ
HU	Közszolgáltató Vállalkozások Konzultációs Fóruma (Consultation Forum for Public Utility Companies)		Tripartite	For state-owned companies providing public utility services	Statutory	EVDSZ (for employees of the MVM Group)	Stratosz
IE	ESB Joint Industrial Council		Tripartite	ESB Group only; hears and issues recommendations on industrial relations disputes	Facilitated by statute but activated by individual companies/sectors	ESB Group of Unions (Unite, ESU, Connect, SIPTU)	ESB Group
IT	Fondo di Previdenza Complementare Pegaso	Bipartite		Integrated pension fund	Agreement	FILCTEM-CGIL, FEMCA CISL, UILCEM UIL	Utilitalia and Anfida
LT	No formal body, but trade unions try to maintain dialogue with the main players in the sector to increase cooperation						
LU	No social dialogue body						
LV	National Tripartite Cooperation Council		Tripartite	General body	Statutory	LAB Energija through the Free Trade Union Confederation of Latvia	LEEA through the Employers' Confederation of Latvia
MT	No sector-related permanent body						
NL	Sociaal-Economische Raad (Social and Economic Council)		Tripartite	Advisory and research body, and forum for policy negotiations	No information available	CNV Publieke Diensten, FNV Publiek Belang, VCP	VNO-NCW, LTO
NL	Stichting van de Arbeid (Labour Foundation)	Bipartite		National-level negotiation forum and advisory organisation	No information available	CNV Publieke Diensten, FNV Publiek Belang, VCP	VNO-NCW, LTO

Representativeness of the European social partner organisations: Electricity sector

	Social dialogue body ⁴⁶	Bipartite/tripartite		Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
PL	Tripartite Team for the Power Industry Sector at the Ministry of Family, Labour and Social Policy (entire power industry)		Tripartite	All sector-relevant issues relating to law, policy and employment conditions	Statutory	SKE NSZZ Solidarność, SKEE, ZZZE, OZZZPRC, ZZiT	ZPEP
PT	No tripartite or bipartite sector-related permanent body						
RO	Sectoral Committee for Energy	Bipartite		Education and professional qualifications	Agreement	Univers, FSLI Energetica, FSLI Petrol-Energie, FSGaz Romania	Federația Patronală Petrol și Gaze (not included in this report, as it covers the gas sector)
SE	No permanent body exists, but informal working groups are common						
SI	Economic and Social Committee for Energy		Tripartite	Legislation, sector specifics, privatisation; all changes to relevant legislation must be consulted on and approved by the social partners	Agreement	SDE	EZS
SK	Economic and Social Council		Tripartite	All relevant employment, working conditions and social policy issues	Statutory	KOZ SR	AZZZ SR and RUZ

Source: Network of Eurofound Correspondents, 2020

2.5. Fragmentation and pluralism in the electricity sector

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

The electricity sector has an average of 3.9 trade unions per Member State. The reasons for the fragmentation and pluralism of the trade unions in the different countries are shown in Table 28. The most common reason is that different trade unions organise different categories of workers (such as blue-collar and white-collar workers), as is the case in 11 Member States. The second most common reason is that the trade unions' members work in different parts of the sector, which applies in nine countries. In nine Member States, fragmentation is explained by differences in the ideologies of the trade unions. The less common explanations are that they have different geographical coverage (in three countries) and that they organise members in different types of company (in only two countries).

Table 28: Reasons for fragmentation and pluralism of trade unions in the electricity sector

	They organise different categories of workers	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector	They have similar membership domains but differ in terms of ideology	Other
AT						
BE						
BG						47
CY						
CZ						48
DE						
DK						
EE						
EL	Only one sector-related trade union (ΓΕΝΟΠ/ΔΕΗ-KHE/GENOP/DEI-KHE), according to the Network of Eurofound Correspondents; PEF/PEMO is not considered sector-related ⁴⁹					
ES						
FI						

⁴⁷ The Bulgarian unions belong to two different confederations: CITUB (the 'old' confederation) and CL-Podkrepa (the 'new' confederation). The division between the two federations is based on inherited structures dating from the 1990s.

⁴⁸ According to Václav Oplt (OSEH), some company trade union organisations are also members of more than one umbrella trade union organisation (for example, some trade union organisations that are members of OSEH are also members of ČOSE or OS ECHO).

⁴⁹ As a result of the expansion of the business portfolios of the gas distribution and trading companies in the country to include activities in trade of electricity, the trade union PEF/PEMO, which represents mainly workers in the natural gas and oil industries, is working towards representing workers in the entire energy sector, including trade of electricity.

Representativeness of the European social partner organisations: Electricity sector

	They organise different categories of workers	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector	They have similar membership domains but differ in terms of ideology	Other
FR						
HR						50
HU						
IE						
IT						
LT						51
LU						
LV	Only one trade union					
MT						52
NL						
PL						
PT						
RO						53
SE						
SI	Only one trade union					
SK						54

Note: Blue shading indicates that the reason in question applies in the Member State.

Source: Network of Eurofound Correspondents, 2020

Employer organisations in the electricity sector are less fragmented than trade unions, with an average of 1.8 employer organisations per Member State. There are 12 Member States in which there is only one employer organisation in the sector, and thus no fragmentation or pluralism. In Denmark, Hungary and Poland there is one employer organisation and a business association for employers in the sector. Table 29 provides an overview of the main reasons for the fragmentation of interest representation on the employers' side. As in the case of the trade unions, the most common reason (recorded for six Member States) is that the organisations have members in different parts of the sector or in different types of activity. Fragmentation due to differences in the type of companies represented exists in three Member States, while differences in terms of ideology are the cause in the Netherlands only.

⁵⁰ According to the Croatian correspondent, there is no fragmentation or pluralism because the six trade unions cooperate successfully.

⁵¹ The unions belong to different peak trade union organisations; these separate organisations date from the Soviet era.

⁵² Both are general trade unions, but traditionally GWU represents blue-collar workers, while EPOU represents engineers.

⁵³ Fragmentation among trade unions in Romania is mainly due to competition among leaders, different visions and different organisational cultures. According to the Romanian correspondent who contributed to this study, this is not a sector-specific trait.

⁵⁴ Fragmentation among trade unions in Slovakia is due to past disagreements.

Table 29: Reasons for fragmentation and pluralism of employer organisations in the electricity sector

	They have members in different parts of the country	They have members in different types of company (in terms of size or ownership)	They have members in different parts of the sector	They have similar membership domains but differ in terms of ideology	Other
AT	Only one employer organisation				
BE					
BG					
CY					
CZ	Only one employer organisation				
DE					
DK					55
EE					
EL					
ES	Only one employer organisation				
FI	Only one employer organisation				
FR	Only one employer organisation				
HR	Only one employer organisation				
HU					56
IE	Only one employer organisation				
IT					
LT	Only one employer organisation				
LU	No employer organisation in the sector				
LV	Only one employer organisation				
MT	Only one employer organisation				
NL					
PL					57
PT	Only one employer organisation				
RO					58
SE					
SI					
SK	Only one employer organisation				

Note: Blue shading indicates that the reason in question applies in the Member State.

Source: Network of Eurofound Correspondents, 2020

⁵⁵ According to the Danish correspondent, there is only one employer organisation in Denmark: DI. Dansk Energi is a business association.

⁵⁶ According to the Hungarian correspondent, there is only one employer organisation in Hungary: VTMSZ. EMT is not an organisation representing employers.

⁵⁷ According to the Polish correspondent, there is only one employer organisation in Poland: ZPEP. PKEE is a business association.

⁵⁸ Employer organisation fragmentation is typical of Romania and results from competing agendas, interpersonal relations and so on. According to the Romanian correspondent who contributed to this study, this is not a sector-specific trait.

3. European level of interest representation

This chapter presents detailed data on the representativeness of the European-level social partners in the electricity sector. There are three social partners listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU. The European organisations representing the trade unions, and thus the workforce in this sector, are EPSU and IndustriAll Europe. The employers in the sector are represented at European level by Eurelectric.

The representativeness of the social partners is assessed in three ways. First, the membership strengths of the European-level social partner organisations on both sides are examined, based on the membership domains covered by their national affiliates (in Sections 3.1 and 3.2 for the trade unions and in Section 3.6 for the employer organisations). As there are two European trade union organisations involved in the electricity ESSDC, their individual representativeness is compared in Section 3.3.

Second, their capacity to negotiate is analysed (in Section 3.9); this means their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide. This capacity to negotiate depends on the involvement of their affiliates in collective bargaining at national level, which ensures not only that they can provide an effective mandate for discussion and negotiation at European level but also that they are in a position to implement European-level agreements. And, third, their effective participation in ESSDC meetings is assessed (in Section 3.10).

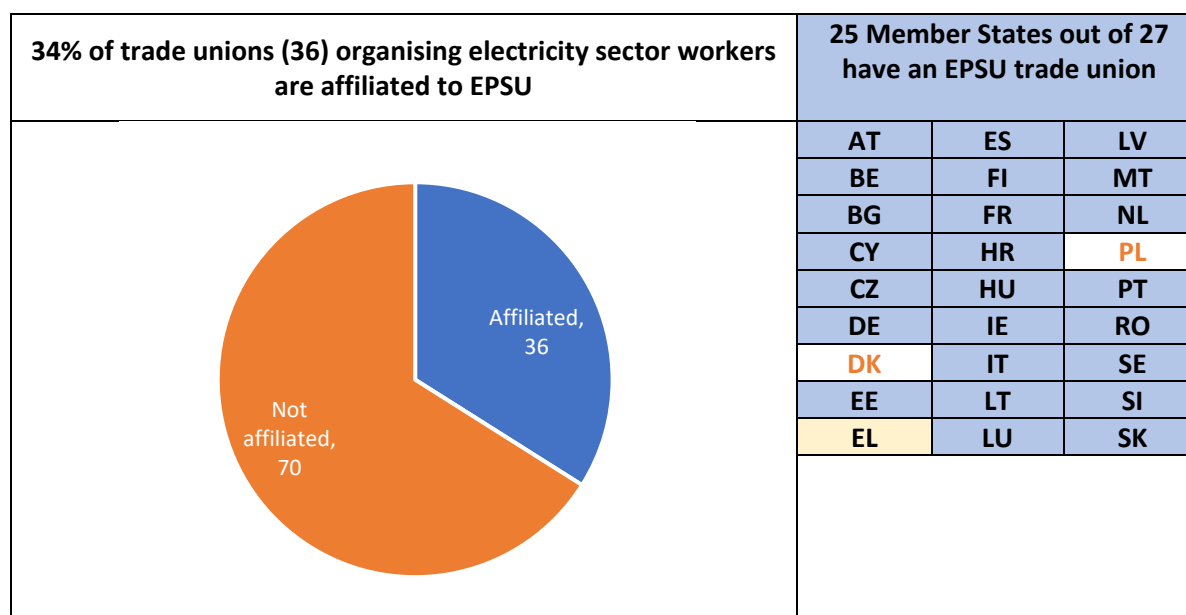
Finally, the limits of the representativeness of the social partners involved in the ESSDC for the electricity sector are assessed in two ways: first, by looking at the national organisations not represented by the organisations involved in the ESSDC (in Sections 3.4 and 3.7) and, second, by considering the representativeness of other European associations in the sector (in Sections 3.5 and 3.8).

3.1. Membership domain of EPSU

EPSU has 36 electricity sector trade unions affiliated to it, of which one is indirectly affiliated (in Cyprus), in 25 Member States of the EU. This represents 34% of the trade unions organising the sector at EU level (Figure 19). There are no affiliated electricity sector trade unions from Denmark⁵⁹ or Poland. The Greek trade union ΓΕΝΟΠ/ΔΕΗ-KHE/GENOP/DEI-KHE and the Spanish trade union ELA did not confirm their membership of EPSU, and therefore they have not been counted as trade unions affiliated to EPSU.

⁵⁹ The list of member organisations provided by EPSU included affiliates from Denmark. However, according to the Network of Eurofound Correspondents, the two trade unions from Denmark listed there – DM and 3F – reported that they were not affiliated to EPSU for the electricity sector, only for public sector employees in other sectors.

Figure 19: Trade unions in the electricity sector affiliated to EPSU



Note: Blue shading indicates that EPSU represents sectoral trade union organisations in the Member State; yellow shading indicates an unconfirmed affiliation.

Source: Compiled by the authors based on data in Table 30

Table 30 provides details on all EPSU member unions representing workers in the electricity sector. There are 20 sectoral trade unions that are affiliated to both EPSU and IndustriAll Europe. The other 16 electricity sector trade unions are represented in the ESSDC only by EPSU.

In terms of sector coverage, production, transmission, distribution and trade are all well covered, as are the public and private sectors. EPSU has a member organisation involved in collective bargaining in the electricity sector in 23 Member States. For Denmark and Poland, this is not the case, as EPSU has no affiliated electricity sector union in either of those countries. In Greece and Spain, the sectoral trade unions that are involved in collective bargaining have not confirmed their affiliation. Except for UGT-FICA from Spain, all the sectoral trade unions affiliated to EPSU are involved in collective bargaining; 13 are involved in both MEB and SEB, and 16 only in SEB.

Table 30: Sector coverage of EPSU affiliates

	Trade union	EPSU	IndustriAll Europe	Parts of the sector organised						Involvement in CB	
				NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
AT	GPA-djp										
	younion										
BE	ABVV-FGTB Gazelco (ACOD-CGSP)										
BG	НФЕ/НФЕУ										
	НСФЕБ/ИТУФВЕИ										
CY	ΕΠΟΠΑΗ-ΟΗΟ-ΣΕΚ/ΕΡΟΡΑΙ-ΟΗΟ-ΣΕΚ	Via ΟΗΟ ⁶⁰									
CZ	OS ECHO										
	SOSE										
DE	ver.di										
EE	EEAÜL/AEEWTU										
EL	ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ/ΓΕΝΟΡ/ΔΕΙ-ΚΗΕ ⁶¹										
ES	UGT-FICA										
	ELA ⁶²			n.d.	n.d.	n.d.	n.d.	n.d.	n.d.		
FI	JHL										
FR	CFE-CGC Energies										
	Interco-CFDT										
	FNEM-FO										
	FNME-CGT										

⁶⁰ ΕΠΟΠΑΗ-ΟΗΟ-ΣΕΚ/ΕΡΟΡΑΙ-ΟΗΟ-ΣΕΚ is a member of ΟΗΟ, and ΟΗΟ is a member of ΣΕΚ/ΣΕΚ. ΣΕΚ/ΣΕΚ is a confederation. ΕΠΟΠΑΗ/ΕΡΟΡΑΙ is directly affiliated to IndustriAll Europe. ΟΗΟ is a member of EPSU. ΟΗΟ is not a member of IndustriAll Europe.

⁶¹ EPSU listed ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ/ΓΕΝΟΡ/ΔΕΙ-ΚΗΕ as an affiliate for the electricity sector in Greece; however, a collaborator of ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ/ΓΕΝΟΡ/ΔΕΙ-ΚΗΕ reported that it is not a member of EPSU; there is only ad hoc cooperation and communication between ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ/ΓΕΝΟΡ/ΔΕΙ-ΚΗΕ and EPSU. The trade union has not been counted as an EPSU member in this report.

⁶² ELA's affiliation to EPSU was not confirmed by the trade union's representative.

Representativeness of the European social partner organisations: Electricity sector

	Trade union	EPSU	IndustriAll Europe	Parts of the sector organised						Involvement in CB	
				NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
HR	HES										
	NSRHEP										
HU	EVDSZ										
IE	SIPTU										
	Unite										
	ESU										
IT	FILCTEM-CGIL										
	FLAEI CISL RETI										
LT	LPPSF/LITUF										
LU	OGB-L										
LV	LAB Energija										
MT	GWU										
NL	FNV Publiek Belang										
PT	Sindel										
RO	Univers										
SE	Kommunal										
	Vision										
	SEKO										
SI	SDE									Indirectly	
SK	ECHOZ										
EU27	36	35 direct, 1 indirect		32	33	34	35	29	31	18	30

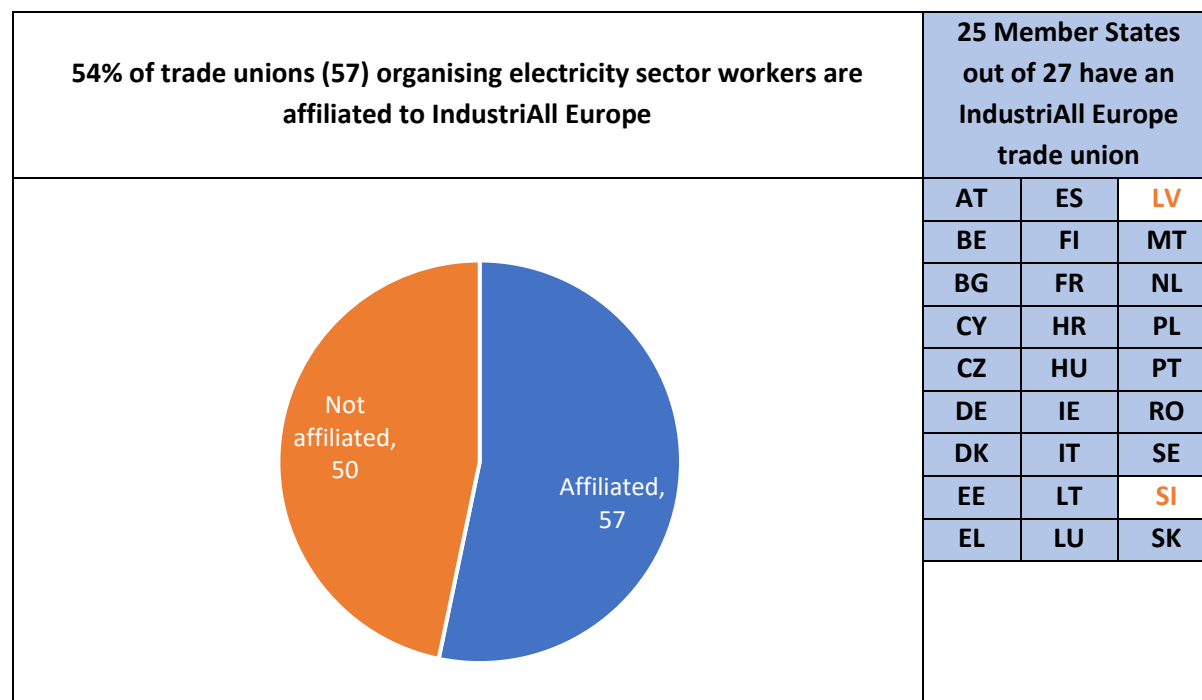
Notes: Orange shading indicates direct affiliation to EPSU and/or IndustriAll Europe, yellow shading indicates indirect affiliation through another organisation that is directly affiliated and red shading indicates an unconfirmed affiliation; green shading indicates the parts of the sector that the organisation covers; and purple shading indicates involvement in collective bargaining. CB, collective bargaining; MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

3.2. Membership domain of IndustriAll Europe

IndustriAll Europe has 49 directly affiliated trade unions in 23 Member States out of 27, and 8 indirectly affiliated trade unions in Croatia, Denmark, France and Poland. This amounts to 54% of the sectoral trade unions in the EU (Figure 20). In Latvia and Slovenia, there are no electricity sector trade unions affiliated to IndustriAll Europe.

Figure 20: Trade unions in the electricity sector affiliated to IndustriAll Europe



Note: Blue shading indicates that IndustriAll Europe represents sectoral trade union organisations in the Member State.

Source: Compiled by the authors based on data in Table 31

Table 31 provides details on all IndustriAll Europe member unions representing workers in the electricity sector. There are 20 sectoral trade unions that are affiliated to both EPSU and IndustriAll Europe. The other 37 electricity sector trade unions are represented in the ESSDC only by IndustriAll Europe.

In terms of sector coverage, production and distribution are covered by slightly more affiliates than transmission and trade, and the private sector is better covered than the public sector by IndustriAll Europe affiliates. Among the IndustriAll Europe member unions in the sector, 52 trade unions in 23 Member States are involved in collective bargaining. Croatia and Greece are the two Member States in which IndustriAll Europe has no affiliated sectoral trade union that is involved in collective bargaining in the electricity sector. In Latvia and Slovenia, there are no sectoral trade unions affiliated to IndustriAll Europe.

Table 31: Sector coverage of IndustriAll Europe affiliates

	Trade union	IndustriAll Europe	EPSU	Parts of the sector organised						Involvement in CB	
				NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
AT	GPA-djp										
	PRO-GE										
BE	ACV-CSC BIE										
	ACV-CSC CNE										
	ACLVB-CGSLB										
BG	ФЕ-Подкрепа/FE-Podkrepa										
	ФАЕ-Подкрепа/FNE-Podkrepa										
CY	ΕΠΟΠΑΗ-ΟΗΟ-ΣΕΚ/ ΕΡΟΡΑΙ-ΟΗΟ-ΣΕΚ		Via OHO								
CZ	OS ECHO										
DE	IGBCE										
DK	DEF	Via CO-industri									
	3F	Via CO-industri									
	Dansk Metal	Via CO-industri									
	IDA										
EE	EEAÜL/AEEWTU										
EL	PEF/PEMO ⁶³										
ES	FI-USO (Sector Energía)										
	UGT-FICA										
	CCOO – Industria										
	ELA										
FI	Sähköliitto										
	Pro										
	TEK Academic Engineers										Via YTN
FR	CFE-CGC Energies										
	Interco-CFDT										
	FNEM-FO										
	FNME-CGT										
	FCE-CFDT										
	CFTC-CMTE										
	UNSA Energie	Via UNSA Industry and Construction									
HR	EKN-HR	Via UATUC									

⁶³ As explained in Section 2, Table 10, this trade union represents mainly workers in the natural gas and oil industries. However, as a result of the expansion of the business portfolios of the gas distribution and trading companies in the country to include activities in trade of electricity, PEF/PEMO is working towards representing workers in the entire energy sector, including trade of electricity.

Representativeness of the European social partner organisations: Electricity sector

	Trade union	IndustriAll Europe	EPSU	Parts of the sector organised						Involvement in CB	
				NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
	SSKH	Via UATUC									
HU	EVDSZ										
	BDSZ										
	VDSZ										
IE	SIPTU										
	Unite										
	Connect										
IT	FILCTEM-CGIL										
	FLAEI CISL RETI										
	UILTEC UIL										
LT	LPPSF/LITUF										
	LEPS Solidarumas										
LU	OGB-L		Via OGB-L								
	LCGB										
MT	GWU										
NL	FNV Publiek Belang										
PL	SKE NSZZ Solidarność	Via SGiE NSZZ Solidarność									
	SKEE	Via SGiE NSZZ Solidarność									
PT	Sindiel										
	Fiequimetal										
RO	UFS Atlas										Indirectly
	FSLI Petrol-Energie										
	SHH										
SE	Sveriges Ingenjörer										
	Unionen										
SK	ECHOZ										
EU27	57	49 + 8 indirect		53	45	48	43	37	50	31	42

Notes: Orange shading indicates direct affiliation to IndustriAll Europe and/or EPSU, yellow shading indicates indirect affiliation through another organisation that is directly affiliated and red shading indicates an unconfirmed affiliation; green shading indicates the parts of the sector that the organisation covers; purple shading indicates involvement in collective bargaining. CB, collective bargaining; MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

3.3. Comparative analysis of the representativeness of EPSU and IndustriAll Europe

The trade unions with most members in the sector from 21 Member States are affiliated to EPSU, while the trade unions with most members in the sector from 20 Member States are affiliated to IndustriAll Europe (Table 32). In 14 countries, the same trade union is affiliated to both EPSU and IndustriAll Europe. The trade union with the second most members in the sector is affiliated to IndustriAll Europe in 11 countries and to EPSU in 8 countries. In Austria, France and Italy, the second largest trade union is affiliated to both European organisations. In all Member States except Cyprus, Malta and Slovakia, the trade unions affiliated to either EPSU or IndustriAll Europe, or both, cover the entire electricity sector. In those three countries, as well as in Estonia, there are significant sectoral trade unions that are not affiliated to either EPSU or IndustriAll Europe.

Table 32: European-level affiliations of the largest and second largest electricity trade unions

Member States with the largest sectoral trade union affiliated to EPSU	Member States with the largest sectoral trade union affiliated to both EPSU and IndustriAll Europe	Member States with the largest sectoral trade union affiliated to IndustriAll Europe
AT, BG, CY, CZ , DE, EE, ES, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, PT, RO, SI, SK	CY, CZ, EE, ES, FR, HR, HU, IE, IT, LT, LU, MT, NL, PT, SK	BE, CY, CZ , DK, EE, ES , FI, FR, HR, HU, IE, IT, LT, LU, MT, NL, PL, PT, SE, SK
Member States with the second largest sectoral trade union affiliated to EPSU	Member States with the second largest sectoral trade union affiliated to both EPSU and IndustriAll Europe	Member States with the second largest sectoral trade union affiliated to IndustriAll Europe
AT , BE, BG, FR , HR, IE, IT , SE	AT, FR, IT	AT , DE, DK, ES, FI, FR , HU, IT , LT, LU, PT
Member States in which the trade unions affiliated to EPSU and/or IndustriAll Europe cover the entire electricity sector	AT, BE, BG, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PL, PT, RO, SE, SI (all except CY, MT, SK)	
Member States with the second largest sectoral trade union not affiliated to EPSU or IndustriAll Europe	CY, CZ, EE, EL, LV, MT, NL, PL, RO, SI, SK	

Note: Blue text indicates affiliation to both EPSU and IndustriAll Europe.

Source: Network of Eurofound Correspondents, 2020

Table 33: Comparative analysis of the representativeness of the European-level trade union organisations with members in the electricity sector

	Total trade unions	Type of affiliation/coverage	Parts of the sector covered						Involvement in collective bargaining	Parts of the sector covered by collective bargaining			
			NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private		NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14
All trade unions	106	Number of trade unions covering this part of the electricity sector	97	82	86	81	67	83	100	83	72	77	67
IndustriAll Europe	57, of which 8 are indirect members	Number of trade unions affiliated to IndustriAll Europe	53	45	48	43	37	50	52	44	37	40	33
	<i>% of 57</i>	<i>% of IndustriAll Europe trade unions with coverage</i>	<i>93</i>	<i>79</i>	<i>84</i>	<i>75</i>	<i>65</i>	<i>87</i>	<i>91</i>	<i>77</i>	<i>65</i>	<i>70</i>	<i>58</i>
	54% of all 106 trade unions in the sector	% of trade unions with coverage that are affiliated to IndustriAll Europe	49	41	44	34	34	46	47	40	34	37	30
	25 Member States	Number of Member States	25	26	26	25	20	26	25	24	21	23	20
EPSU	36, of which 1 is an indirect member	Number of trade unions affiliated to EPSU	32	33	34	35	29	31	35	31	32	33	34
	<i>% of 36</i>	<i>% of EPSU trade unions with coverage</i>	<i>89</i>	<i>92</i>	<i>94</i>	<i>97</i>	<i>81</i>	<i>86</i>	<i>97</i>	<i>86</i>	<i>89</i>	<i>92</i>	<i>94</i>
	34% of all 106 trade unions in the sector	% of trade unions with coverage that are affiliated to EPSU	30	31	32	33	27	29	34	26	25	28	28
	25 Member States	Number of Member States	23	25	25	24	19	21	25	21	21	23	21

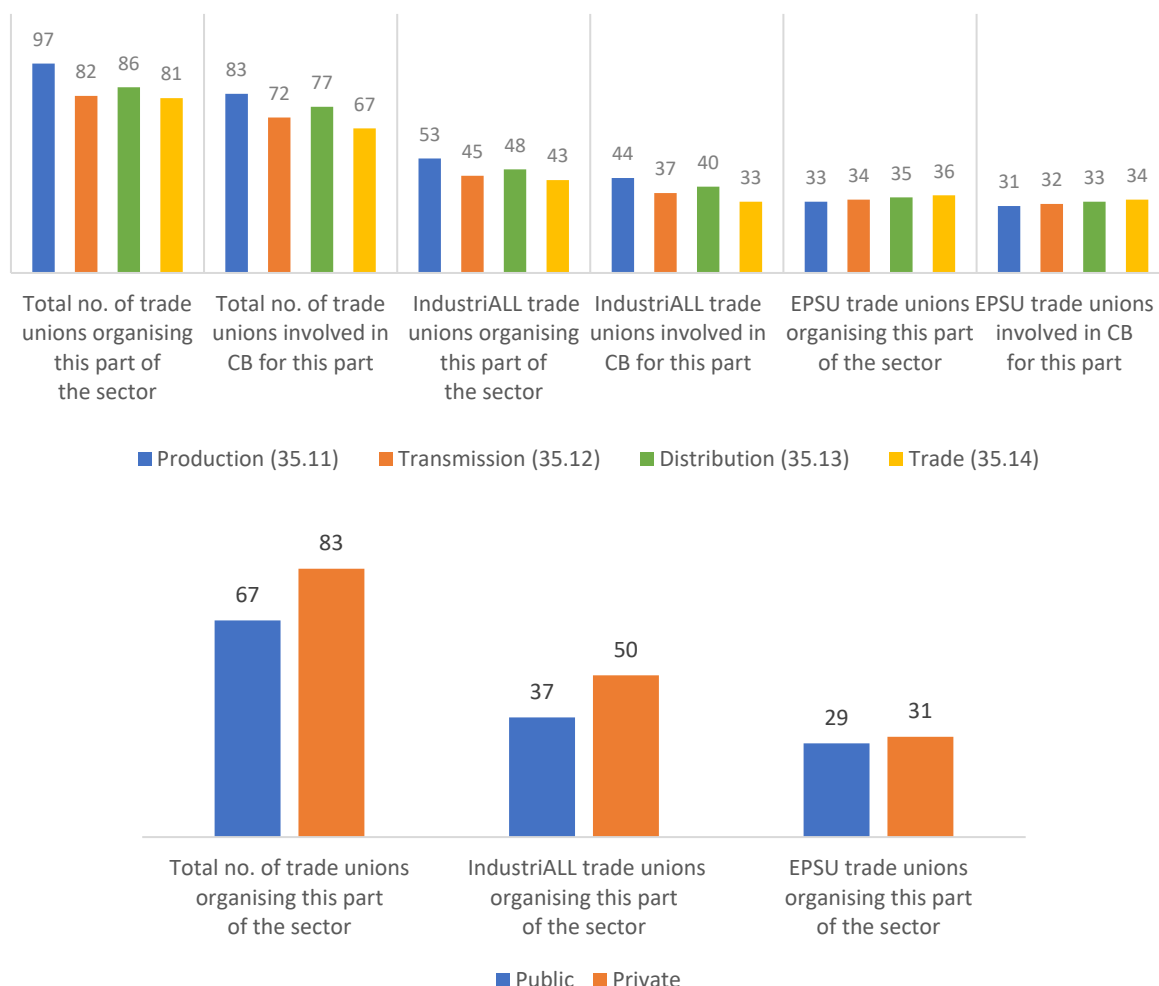
Source: Network of Eurofound Correspondents, 2020

Looking at the European landscape of representativeness, there are 36 direct or indirect affiliates of EPSU, in 25 Member States out of 27 (Table 33). This represents 34% of the trade unions organising the sector at EU level. There are no members in Denmark or Poland.

IndustriAll Europe has 57 direct or indirect affiliates, which constitutes 54% of the sectoral trade unions in the EU. IndustriAll Europe has affiliates in all Member States except Latvia and Slovenia.

Figure 21 offers a comparative analysis by part of the sector (NACE codes and public and private sectors).

Figure 21: Comparative analysis of trade union coverage, involvement in collective bargaining and European-level affiliation for each part of the electricity sector



Source: Network of Eurofound Correspondents, 2020

3.4. National trade unions not represented in the ESSDC

There are 33 electricity sector trade unions (31%) in 15 Member States that are not represented in the ESSDC because they are not affiliated to either EPSU or IndustriAll Europe (Table 34). Of them, two are affiliated to other international organisations: CEC European Managers and EUCDW. Only ΓΕΝΟΠ/ΔΕΗ-KHE/GENOP/DEI-KHE in Greece is the largest sectoral trade union in its country. None of the remaining 32 trade unions is the largest in the electricity sector in its country. However, in Cyprus, Czechia, Estonia, Greece, Malta, the Netherlands, Poland and Slovakia the second largest trade union covering the sector is not represented at European level. More of the 33 trade unions cover the private sector than cover the public sector. Only 1 of them is not involved in collective bargaining, 7 are involved in both multi- and single-employer bargaining, and 23 are involved in single-employer bargaining only.

Table 34: Characteristics of trade unions not represented in the ESSDC

	Trade union	Size	Covers other sectors	Other EU/international affiliation	Parts of the sector organised						Involvement in CB	
					NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
CY	ΣΗΔΗΚΕΚ-ΠΕΟ/SIDIKEK-PEO	2nd largest										
	ΣΕΠΑΗΚ/ΣΕΡΑΙΚ	3rd largest										
	ΣΥΒΑΗΚ/SIVAİK	4th largest										
	KTMAS – a union active in the territory of Cyprus occupied by the Turkish army – is not covered by the Network of Eurofound Correspondents; it covers only the area under the effective control of the Republic of Cyprus, and therefore KTMAS was not counted in this report											
CZ	ČOSE	2nd largest										
	OSEH	3rd largest										
EE	KESA	3rd largest										
	NEAÜ	2nd largest										
EL	ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ GENOP/DEI-KHE	Largest										
ES	SIE	4th largest										
	ATYPE-CC	5th largest		CEC European Managers								
FI	KTK											
	Finnish Engineers' Association											
	YTN											
FR	SUD Energies											
HR	TEHNOS	3rd largest										
	HEDISS											
MT	EPOU	2nd largest										
NL	CNV Publieke Diensten	2nd largest		EUCDW								
PL	ZZZE	2nd largest										
	ZZiT											
	OZZZPRC											
PT	Fetese											

Representativeness of the European social partner organisations: Electricity sector

	Trade union	Size	Covers other sectors	Other EU/international affiliation	Parts of the sector organised						Involvement in CB	
					NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
	FE											
	Sirep	Very small				n.d.						
	SISE	Very small				n.d.						
	Sinergia	3rd largest										
	Asosi											
	SIEAP	4th largest										
RO	FSLI Energetica	3rd largest										
	Sindicatul Muntele											
SE	Elektrikerna											
	Ledarna	3rd largest										
SK	ZOEZ	2nd largest										
EU27	33 trade unions in 15 Member States are not represented in the ESSDC			2	32	23	26	26	18	24	9	30
	<i>31% of the total 106 trade unions in 27 Member States</i>			<i>2%</i>	<i>30%</i>	<i>22%</i>	<i>25%</i>	<i>25%</i>	<i>17%</i>	<i>23%</i>	<i>8%</i>	<i>28%</i>

Notes: In the 'Covers other sectors' column, green shading is used for gas and purple shading is used for all other sectors. CB, collective bargaining; MEB, multi-employer bargaining; n.d., no data available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

3.5. Other European-level trade union organisations

There are 12 other European organisations to which a very small number of national trade unions organising workers in the electricity sector are affiliated. Table 35 lists those other European associations to which national organisations included in this report are affiliated. We can first rule out as relevant organisations those shaded grey in Table 35, as they do not represent electricity sector workers at European level. We can also rule out the organisations shaded blue, which are represented in the ESSDC through their membership of EPSU or IndustriAll Europe. The involvement of UNI Europa in the sector could be accounted for by private service activities in electricity trade; however, the five electricity sector trade unions affiliated to it are all already represented in the ESSDC by EPSU and IndustriAll Europe, as shown in Table 35. Eurofedop, which is part of CESI, has one affiliated electricity sector trade union in Austria, and the one electricity sector trade union that CEC European Managers has as an affiliate, ATYPE-CC, represents managerial employees in the sector in Spain. EUCDW has one affiliated Dutch trade union, CNV Publieke Diensten, that is not affiliated to EPSU or IndustriAll Europe. From this thorough analysis, it can be concluded that IndustriAll Europe and EPSU are the main European-level trade union organisations representing workers in the electricity sector.

Table 35: Other European and international associations to which national trade unions in the electricity sector are affiliated

Other EU-level trade union organisations			Member States with an affiliate ⁶⁴	Affiliates in the electricity sector
Abbreviation	Full name	Assessment of sector-relatedness		
UNI Europa	UNI Europa – the European Services Workers Union	A European trade union federation organised by sectors and regions, and covering numerous sectors. UNI Europa has no specific executive committee for the electricity sector. It has a total of 272 member unions in 50 countries	27	Two in Austria, which are also affiliated to EPSU and IndustriAll Europe One in Germany, which is also affiliated to EPSU Two in Luxembourg, which are also affiliated to IndustriAll Europe
ETF	European Transport Workers' Federation	ETF is a pan-European trade union organisation that represents trade unions organising workers in 10 sectors in the transport industry, on land, on sea and in the air, from EU and European Economic Area states	27	Two in Austria, which are also affiliated to EPSU and IndustriAll Europe
EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions	EFFAT represents 120 national trade unions in the agriculture, food and tourism industries	26 (no members in Estonia)	Two in Austria, which are also affiliated to EPSU and IndustriAll Europe One in Spain, which is also affiliated to EPSU and IndustriAll Europe

⁶⁴ Information extracted from the organisations' websites.

Representativeness of the European social partner organisations: Electricity sector

Other EU-level trade union organisations			Member States with an affiliate ⁶⁴	Affiliates in the electricity sector
Abbreviation	Full name	Assessment of sector-relatedness		
EFJ	European Federation of Journalists	The EFJ represents journalists' organisations across Europe. It was created in 1994 within the framework of the International Federation of Journalists to represent the interests of journalists in Europe	27	Two in Austria, which are also affiliated to EPSU and IndustriAll Europe
IFSW Europe	International Federation of Social Workers Europe	IFSW Europe is the European branch of a global representative body for social workers	27	One in Austria, which is also affiliated to EPSU and IndustriAll Europe
Eurofedop	European Federation of Public Service Employees	Eurofedop brings together Christian and democratic trade unions organising workers in security; local, regional and central administration; finance, post and telecoms; and justice	16 (AT, BE, DE, DK, EL, ES, FR, HU, IE, LT, MT, NL, PT, RO, SI, SK)	One in Austria, which is also affiliated to EPSU and IndustriAll Europe
PSI	Public Services International	PSI is a global union federation for workers in public services, including those who work in social services, healthcare, municipal services, central government and public utilities	25	Two in Croatia, which are also affiliated to EPSU One in Estonia, which is also affiliated to EPSU and IndustriAll Europe One in Latvia, which is also affiliated to EPSU
CEC European Managers	Confédération européenne des cadres	CEC European Managers represents around one million managers in Europe through its national and sectoral federations	12 (BE, CZ, DE, DK, EL, ES, FR, HU, IT, PT, SE, SI)	One in Spain, ATYPE-CC, which is not affiliated to any organisation on the ESSDC
ETUC	European Trade Union Confederation	ETUC comprises 89 national trade union confederations and 10 European trade union federations	24 (no members in Austria, Slovakia or Slovenia)	Two in Hungary, which are also affiliated to IndustriAll Europe (one of these is indirectly affiliated) One in Malta, which is also affiliated to EPSU and IndustriAll Europe One in Spain, which is also affiliated to EPSU and IndustriAll Europe

Representativeness of the European social partner organisations: Electricity sector

Other EU-level trade union organisations			Member States with an affiliate ⁶⁴	Affiliates in the electricity sector
Abbreviation	Full name	Assessment of sector-relatedness		
FECER	European Federation of Executives in the Sectors of Energy and Related Research (Federation européenne des cadres de l'énergie et de la recherche)	FECER is a member of CEC European Managers and its purpose is to discuss, formulate and represent the common interests of managers in the European energy sectors	7 (BE, DE, DK, ES, FR, IT, LT)	One in France, which is also affiliated to EPSU and IndustriAll Europe
EUCDW	European Union of Christian Democratic Workers	EUCDW is the official association of Christian democratic workers in the European People's Party	15 (AT, BE, CZ, DE, EL, ES, HU, IE, IT, LU, MT, NL, PT, RO, SL)	One in the Netherlands, CNV Publieke Diensten, which is not affiliated to any organisation on the ESSDC
RETSEE (RETUN SEE)	Regional Energy Trade Union South East Europe	Little information is available on this organisation; it seems to be relevant at regional level only	Slovenia only	One in Slovenia, which is also affiliated to EPSU

Notes: Grey shading indicates organisations that do not represent electricity sector workers at European level. PSI is a global and not a European organisation and the others are clearly not related to the electricity sector. Blue shading indicates organisations to which sectoral trade unions are affiliated that are already represented in the ESSDC through their membership of IndustriAll Europe or EPSU.

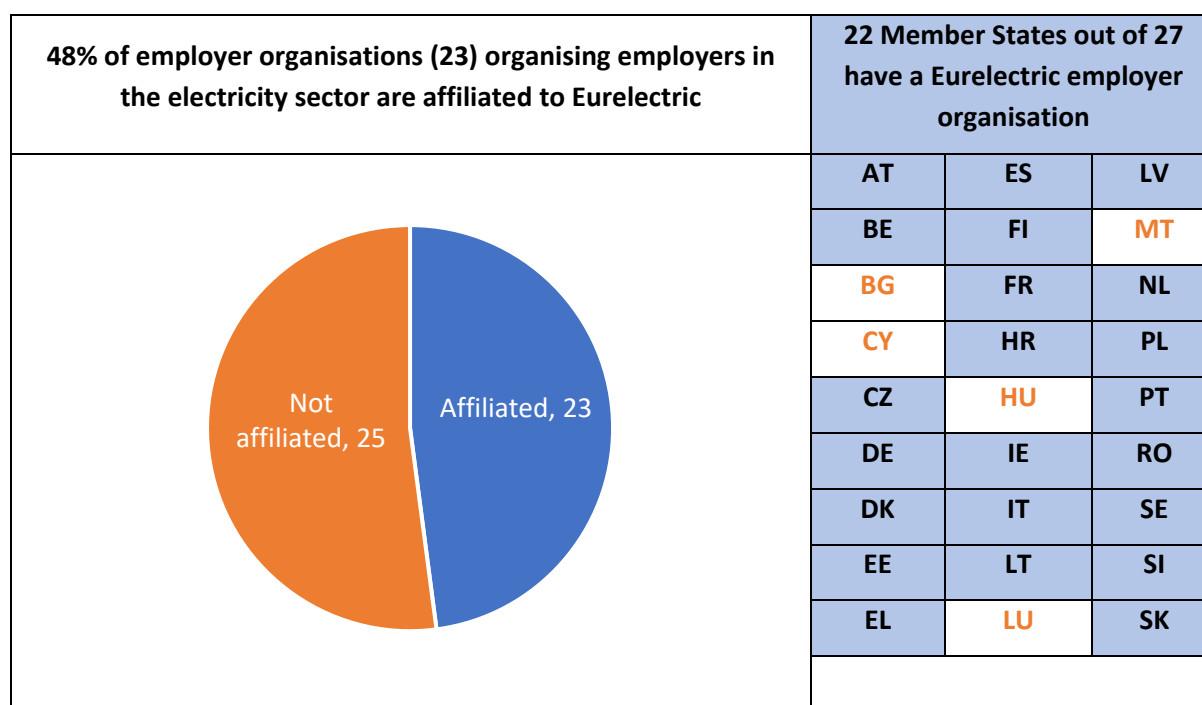
Source: Compiled by the authors based on information from the Network of Eurofound Correspondents for 2020

3.6. Membership domain of Eurelectric

Eurelectric is the federation for the European electricity industry, representing employer organisations in the power sector in over 32 European countries, including 22 EU Member States, in power generation, distribution, supply and trade. According to its website, Eurelectric advocates for the competitiveness of the sector, by providing interest representation in public affairs and by promoting the role of the electricity sector in addressing the challenges of sustainable development.

Eurelectric represents 23 electricity sector employer organisations from 22 Member States (Figure 22).⁶⁵ The EU Member States that have no affiliated member are Bulgaria, Cyprus, Hungary,⁶⁶ Luxembourg and Malta.

Figure 22: Employer organisations in the electricity sector affiliated to Eurelectric



Note: Blue shading indicates that Eurelectric represents sectoral employer organisations in the Member State.

Source: Compiled by the authors based on data in Table 36

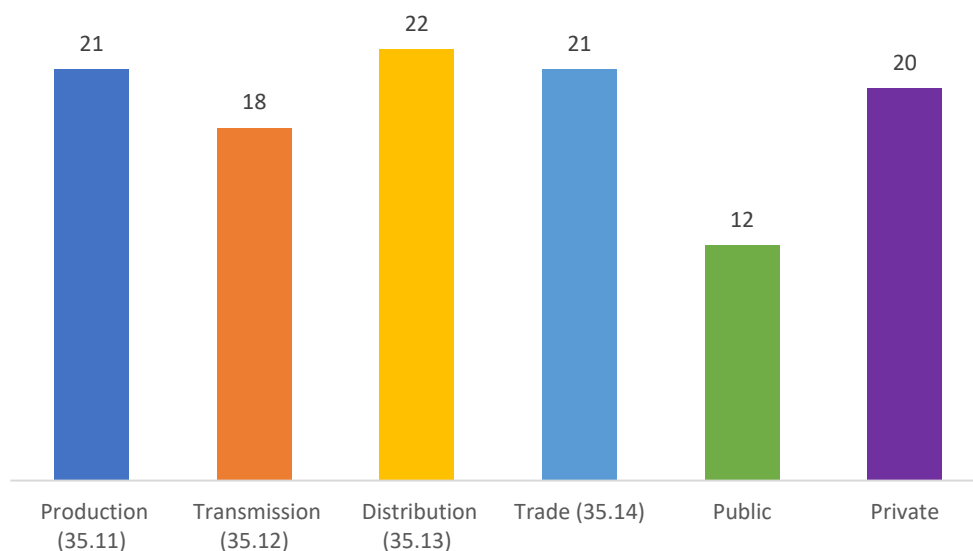
In 16 of the 22 Member States, the Eurelectric affiliate is either the largest or the only employer organisation in the electricity sector. Almost all the Eurelectric members organise companies active in production, distribution and trade of electricity, and 18 members also cover members active in transmission of electricity (Figure 23). Of the 23 member organisations, 17 cover all the parts of the sector as delimited by the NACE codes, and 10 out of those 17 also cover both the private and public

⁶⁵ As noted in the minutes of the ESSDC working groups meeting of 3 February 2021, the social partners declared their intention to continue to involve the UK in the committee's decisions. The minutes record that a decision on this will be taken based on the rules on the participation of third-country experts.

⁶⁶ The list of member organisations provided by Eurelectric included EMT; however, the national correspondent reported that the chairman of EMT had indicated that EMT was not active in the sector and not affiliated to Eurelectric. EMT has a cooperation agreement with the employer organisation VTMSZ, which is included in the current report but is also not affiliated to Eurelectric.

parts of the sector. While no Eurelectric member is involved in company-level bargaining,⁶⁷ 11 members are involved in multi-employer bargaining, in Austria, Belgium, Czechia, Finland, France, Italy, the Netherlands, Slovakia, Slovenia and Sweden.

Figure 23: Sectoral coverage of employer organisations affiliated to Eurelectric (number)



Source: Network of Eurofound Correspondents, 2020

Table 36 provides details on the 23 electricity sector employer organisations affiliated to Eurelectric in 22 Member States. Of them, 11 also cover companies active in sectors other than electricity. Only 1 of the 11 covers companies active in gas. Seven of the employer organisations affiliated to Eurelectric are also affiliated to other European organisations.

⁶⁷ In Austria, in exceptional cases, OEE signs collective agreements on behalf of companies, but it is not itself involved in bargaining.

Table 36: Sector coverage of Eurelectric affiliates

	Employer organisation or business association	Size	Eurelectric	Other European/international affiliation	Parts of the sector organised						Involvement in CB	
					NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
AT	OEE	Only one		Geode								68
BE	FEBEG	Largest										
CZ	ČSZE	Only one		ISSA, VMET, ZZES								
DE	BDEW	n.d.		Eurogas								
DK	Dansk Energi	Largest (BA)										
EE	ETL	Largest or 2nd largest ⁶⁹		CEEP								
EL	ΣΕΗΕ/ΗΕΛΑΣ	Largest							n.d.	n.d.		
ES	AELEC	Largest		ECOBA								
FI	Energiatollisuus	Only one		Geode, Foratom, WindEurope, EHP								
FR	UFE	Only one		Market Parties Platform								
HR	Croatian Chamber of Economy ⁷⁰	Not relevant										
IE	EAI	Only one										
IT	Elettricità Futura	Largest										
LT	NLEA	Only one										

⁶⁸ OEE signs collective agreements on behalf of companies, but it is not itself involved in bargaining.

⁶⁹ ETL is largest organisation in terms of workforce employed by its member companies; ETEA is the largest in terms of number of member companies.

⁷⁰ The Croatian Chamber of Economy does not cover the sector.

Representativeness of the European social partner organisations: Electricity sector

	Employer organisation or business association	Size	Eurelectric	Other European/international affiliation	Parts of the sector organised						Involvement in CB	
					NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
LV	LEEA	Only one										
NL	Energie Nederland	2nd largest									Via WENB	
	Netbeheer Nederland	Largest for distribution (NACE 35.13)									Via WENB	
PL	PKEE	2nd largest										
PT	Elecpor	Only one										
RO	IRE	Largest										
SE	EFA	Largest										
SI	EZS	Largest										
SK	ZZES	Only one										
EU27	23		23	7	21	18	22	21	12	20	11	0

Notes: Orange shading indicates direct affiliation to Eurelectric, green shading indicates the parts of the sector that the organisation covers, and purple shading indicates involvement in collective bargaining. BA, business association; CB, collective bargaining; EO, employer organisation; MEB, multi-employer bargaining; n.d., no data available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

In Annex 3, Table 56, additional information is provided on 27 companies active in the electricity sector in 13 Member States that are indirectly affiliated to Eurelectric, in addition to its employer organisation and business association affiliates. There are many more companies, other than these 27, that are members of national employer organisations and as such also represented by Eurelectric. Table 56, however, illustrates that Eurelectric has all the largest individual employers in the sector in its membership domain. In Greece, Ireland, Italy, Malta and Portugal, the largest sectoral company is represented by Eurelectric through a national employer organisation.

In 18 Member States, an employer organisation affiliated to Eurelectric is either the largest or the only one. In the Netherlands and Poland, although the largest employer organisation is not a Eurelectric member, the second largest one is affiliated (Table 37).

Table 37: European-level affiliations of the largest and second largest electricity employer organisations

Member States with the largest or only sectoral employer organisation affiliated to Eurelectric	AT, BE, CZ, DK, EE, EL, ES, FI, FR, IE, IT, LT, LV, PT, RO, SE, SI, SK (all except BG, CY, DE, HR, HU, LU, MT, NL, PL)
Member States with the second largest sectoral employer organisation affiliated to Eurelectric	NL, PL
Member States in which the employer organisations affiliated to Eurelectric cover the entire sector (NACE 35.1)	AT, CZ, DE, DK, ES, FI, FR, IE, LT, LV, RO, SE, SI, SK
Member States with significant sectoral employer organisations that are not affiliated to Eurelectric	IT, NL, PL
Countries with no sectoral employer organisation	LU

Source: Table 19

3.7. National employer organisations not represented in the ESSDC

Of the 48 employer organisations, 24 (50%) from 16 Member States are not affiliated to Eurelectric (Table 38). Of the 24, 8 are affiliated to other European or international organisations. It is noteworthy that 9 of these 24 organisations are either the largest or the only sectoral employer organisation, in Bulgaria, Croatia, Cyprus, Denmark, Germany, Hungary, Malta, the Netherlands and Poland. Another eight organisations are the second largest in the electricity sector

Production and trade of electricity are covered by more of the 24 employer organisations than transmission and distribution, and 20 of the 24 cover the private sector. Of the employer organisations that are not affiliated to Eurelectric, 15 have members from other sectors besides electricity. While 11 are involved in multi-employer bargaining in the electricity sector, only 5 conduct company-level negotiations.

Table 38: Characteristics of employer organisations not represented in the ESSDC

	Employer organisation	Size	Other European/international affiliation	Parts of the sector covered						Involved in CB	
				NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
BE	Synergrid	2nd largest									
BG	ББКЕ/BBCE	Largest									
CY	ΣΕΑΠΕΚ/SEAPEK	Largest	Solar Power Europe								
	ΣΥΠΑΒΙΚ/SYPABIK	3rd largest	EBA								
	ΣΑΕΚ/SAEK	4th largest	European Wind Association								
	ΣΣΑΑΗ/SSAAH	2nd largest									
DE	VAEU	2nd largest	BusinessEurope (via BDA)								
	VKA	Largest	CEEP (via bvöd), HOSPEEM								
DK	DI	Largest	BusinessEurope								
EE	EPEA										
	ETEA		WindEurope								
EL	ΕΣΑΗ/HAIPP	2nd largest									
HR	UE HEP	Only one									
HU	VTMSZ	Only one									
IT	Energia Libera	2nd largest									
	Utilitalia	3rd largest									
MT	MEA	Only one	CEEP								
NL	NVDE										

Representativeness of the European social partner organisations: Electricity sector

	Employer organisation	Size	Other European/international affiliation	Parts of the sector covered						Involved in CB	
				NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private	MEB	SEB
	WENB	Largest									
PL	ZPEP	Largest									
RO	FP Energetica ⁷¹	3rd largest		n.d.	n.d.	n.d.	n.d.	n.d.	n.d.		
	ACUE	2nd largest									Indirectly
SE	Sobona	2nd largest									
SI	ZDS	2nd largest									
EU27	24		8	21	16	17	18	11	20	11	5

Notes: Those marked in bold are the largest or only employer organisation in the Member State. Green shading indicates the parts of the sector that the organisation covers; purple shading indicates involvement in collective bargaining. CB, collective bargaining; MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

⁷¹ No precise data collected on sector coverage. The organisation has not met the national representativeness criteria since 2012.

3.8. Other European-level employer organisations

There are 18 other European organisations that were identified in this study to which national employer organisations or business associations representing companies in the electricity sector are affiliated. They are listed in Table 39.

Three of the employer organisations included in this report, from Estonia, Germany and Malta, are affiliated to CEEP – the European Centre of Employers and Enterprises providing Public Services – which proves the still strong relationship between companies in the electricity sector and organisations representing providers of public services. Eurogas, Geode and the Market Parties Platform, an independent organisation strongly linked with Eurelectric, each have two members among the employer organisations covered in this report. The affiliation to Eurogas of national associations organising employers in the electricity sector indicates that in some cases electricity providers also provide other public utilities, including gas.

Table 39: Other EU-level associations to which national employer organisations/business associations in the electricity sector are affiliated

Other EU-level employer organisations/business associations			Member States with an affiliate ⁷²	Affiliates in the electricity sector
Abbreviation	Full name	Assessment of sector-relatedness		
Eurogas	Eurogas	Eurogas is an association representing the European gas wholesale, retail and distribution sector to the EU institutions. Founded in 1990, Eurogas currently comprises 51 companies and associations from 24 countries	18 (AT, BE, CZ, DE, DK, ES, FI, FR, IE, IT, LU, LV, NL, PT, RO, SE, SI, SK)	One in Austria, which is also affiliated to Eurelectric One in Germany, which is also affiliated to Eurelectric
Geode	Geode	Founded in 1991, Goede is a network of 1,200 gas and electricity distribution companies in 15 countries	11 (AT, BG, DE, DK, EL, ES, FI, FR, IT, NL, SE)	One in Austria, which is also affiliated to Eurelectric One in Finland, which is also affiliated to Eurelectric
Solar Power Europe (formerly EPIA)	Solar Power Europe (the European Photovoltaic Industry Association until 2015)	Solar Power Europe is an organisation that aims to shape the regulatory environment to promote solar-generated energy technologies in Europe	17 (AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, HU, IE, IT, NL, SE, PL, PT)	One in Cyprus, which is not affiliated to Eurelectric
EBA	European Biogas Association	EBA works to develop policies that can enable the large-scale deployment of renewable gases and organic	22 (AT, BE, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IT, LT, LV, NL, PL, PT, RO, SE, SI, SK)	One in Cyprus, which is not affiliated to Eurelectric

⁷² Information extracted from the organisations' websites.

Representativeness of the European social partner organisations: Electricity sector

Other EU-level employer organisations/business associations			Member States with an affiliate ⁷²	Affiliates in the electricity sector
Abbreviation	Full name	Assessment of sector-relatedness		
		fertilisers throughout Europe		
ISSA	International Social Security Association	ISSA is an international organisation bringing together national social security administrations and agencies	19 (AT, BE, BG, CY, CZ, DE, EE, EL, ES, FR, HU, IT, LT, LV, NL, PL, PT, RO, SE)	One in Czechia, which is affiliated to Eurelectric
Business Europe	Confederation of European Business	BusinessEurope is a cross-sectoral confederation representing enterprises of all sizes in the EU and seven non-EU European countries	26 (AT, BE, BG, CY, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, PL, PT, RO, SE, SK)	One in Denmark, which is not affiliated to Eurelectric One in Germany, which is not affiliated to Eurelectric
CEEP	European Centre of Employers and Enterprises providing Public Services	CEEP has represented employers and enterprises providing services of general interest since 1961	15 (AT, BE, BG, DE, DK, EL, ES, FI, FR, IT, MT, NL, PL, PT, SE)	One in Estonia, which is affiliated to Eurelectric One in Germany, which is not affiliated to Eurelectric One in Malta, which is not affiliated to Eurelectric
ECOBA	European Coal Combustion Products Association	ECOBA represents the European energy producers that deal with matters related to the use in construction of raw materials from coal	13 (CZ, DE, DK, EE, EL, ES, FI, FR, IE, IT, NL, PL, PT), plus one associate member in Belgium	One in Spain, which is also affiliated to Eurelectric
Foratom	European Atomic Forum	Foratom is a trade association for the nuclear energy industry in Europe and represents the European nuclear industry in energy policy discussions with the EU institutions and other key stakeholders	12 (BE, BG, ES, FI, FR, HU, IT, NL, RO, SE, SI, SK)	One in Finland, which is also affiliated to Eurelectric
WindEurope (formerly EWEA)	WindEurope (formerly the European Wind Energy Association)	WindEurope represents the wind industry, actively promoting wind power in Europe and worldwide	19 (AT, BE, BG, CZ, DE, DK, EE, EL, ES, FI, FR, HR, IE, IT, LT, NL, PL, PT, RO)	One in Cyprus, which is not affiliated to Eurelectric One in Finland, which is also affiliated to Eurelectric
EHP	Euroheat & Power	EHP is the international network for district energy, promoting sustainable heating and	21 (AT, BE, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IT, LT, LU, LV, NL, PL, PT, SE, SI)	One in Finland, which is also affiliated to Eurelectric

Representativeness of the European social partner organisations: Electricity sector

Other EU-level employer organisations/business associations			Member States with an affiliate ⁷²	Affiliates in the electricity sector
Abbreviation	Full name	Assessment of sector-relatedness		
		cooling in Europe and beyond		
Market Parties Platform	Market Parties Platform	The Market Parties Platform is a cooperation mechanism for energy industry associations in the central west European electricity market. It works to promote an integrated electricity market. The platform is independent but strongly linked with Eurelectric	5 (AT, BE, DE, FR, LU)	Two in France, which are also affiliated to Eurelectric
E.DSO	European Distribution System Operators	E.DSO is the key interface between the leading electricity distribution system operators and the European institutions and stakeholders. E.DSO promotes the development and large-scale testing of smart-grid technologies in real-life situations, new market designs and regulation	16 (AT, BE, CY, CZ, DE, EL, ES, FI, IT, LV, NL, PL, PT, RO, SE, SI)	One in Cyprus, which is also affiliated to Eurelectric
IENE	Institute of Energy for South-East Europe	IENE is a group of independent professionals and business executives active in the energy sector of the region. Its purpose is to constitute a permanent forum for analysing, discussing and improving the energy sector	4 (BG, CY, EL, RO)	One in Cyprus, which is also affiliated to Eurelectric One in Greece, which is indirectly affiliated to Eurelectric
ENA	Energy Networks Association	ENA is an industry body for the companies that run Ireland's and the UK's energy distribution networks	2 (CY, IE)	One in Cyprus, which is also affiliated to Eurelectric
EFET	European Federation of Energy Traders	EFET represents energy traders and works to improve the functioning and the design of energy markets	13 (AT, CZ, DE, DK, EL, FI, FR, HR, HU, IT, NL, PT, SI)	One in Greece, which is indirectly affiliated to Eurelectric
ENTSO-E	European Network of Transmission System	ENTSO-E represents electricity transmission system operators from 35 countries across the EU and outside it. ENTSO-E	26 (all except Malta)	One in Luxembourg, which is also affiliated to Eurelectric

Other EU-level employer organisations/business associations			Member States with an affiliate ⁷²	Affiliates in the electricity sector
Abbreviation	Full name	Assessment of sector-relatedness		
	Operators for Electricity	was established and given legal mandates by the EU's third package for the internal energy market in 2009, which aimed to further liberalise the gas and electricity markets in the EU		
Coreso	Coordination of Electricity System Operators	Coreso is a regional initiative that aims to contribute to a coordinated approach to the security of the electricity system, the integration of large-scale renewable energy generation and the development of the European electricity market	7 (BE, DE, ES, FR, IE, IT, PT)	One in Portugal, which is not affiliated to Eurelectric

Source: Compiled by the authors, based on information from the Network of Eurofound Correspondents for 2020

3.9. Capacity to negotiate and represent all affiliated organisations

Eurelectric was established in 1989 and has been involved in the electricity ESSDC since its establishment in 2000. According to its statutes, the organisation's objectives are to produce studies on social, political, technical, legal and institutional issues that are directly or indirectly connected with electricity production, transport, distribution, supply and consumption, and to collect and distribute information, organise meetings and seminars, and coordinate networking among electricity sector experts (Article 2 of the Eurelectric Statutes).

The Eurelectric Secretariat has 39 staff members, of whom one advisor (with the support of a head of unit) is involved in the ESSDC's activities. Internally, the organisation went through major changes in 2017, when a new secretary general arrived. In terms of its autonomy, Eurelectric has a website with a members only section through which internal documents relating to the organisation of meetings, information on events and position papers are shared.

Eurelectric discusses social dialogue matters internally in its Working Group on Social Sustainability, within which there is a smaller group specialising in industrial relations, the Task Force on Social Dialogue. Joint texts or activities are agreed and approved at working group level, and only very rarely are social dialogue matters brought to the higher level of the Electrification and Sustainability Committee.

For example, the 2021 and 2017 joint statements on just transition were first discussed in the Working Group on Social Sustainability, where it was agreed that these were priority deliverables for the ESSDC. Draft texts and progress on the matter were reported to and discussed in meetings of the Working

Group on Social Sustainability, and between meetings emails were sent to update the members of the working group. More regular exchanges took place within the Task Force on Social Dialogue. Following a round of written comments from the working group members, based on the technical work of the members of the task force, the texts were approved by the Working Group on Social Sustainability, after which they were signed by the Eurelectric Secretary General during a meeting of the ESSDC.

Thus, Eurelectric confirms that it has the capacity to agree on joint opinions based on a standard mandating procedure, which is, however, not formalised. This means in practice that often in the ESSDC meetings the Eurelectric Secretariat initiates a procedure to consult its members on the draft proposals in writing. Eurelectric has no experience yet of negotiating binding European social partner agreements, as these have not yet been proposed in the electricity ESSDC, and making such agreements is not one of Eurelectric's objectives according to its statutes.

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

In relation to sectoral social dialogue, EPSU proposes a subject for discussion with sectoral employers or accepts a proposal from sectoral employers. The standing committees take decisions on this based on the general policies that EPSU has adopted and its programme of priorities. The standing committees decide on the issues they wish to see covered. A negotiating team is nominated for the preparation of a joint position if necessary. The team members are nominated by the relevant standing committee, ensuring a proper balance of expertise on the subject, regional representation, and women and men. The team always includes a representative of the EPSU Secretariat. The EPSU Secretariat can draft proposals and responses.

The EPSU delegation to the electricity ESSDC is composed of members of the relevant standing committee, including a representative of each EU Member State, insofar as possible. It reports to the standing committee. All affiliates in the electricity sector are informed and consulted on positions taken in the ESSDC. The standing committee considers the final results of sectoral negotiations. It forwards a recommendation to adopt or reject to the Executive Committee for its approval.

IndustriAll Europe was created in June 2012 when the affiliates of the EMF, EMCEF and ETUF-TCL decided to join forces. Before 2012, EMCEF had represented workers in the electricity ESSDC. When the EMF, EMCEF and ETUF-TCL amalgamated as IndustriAll Europe, the new organisation immediately became a member of ESSDC as a successor organisation. IndustriAll Europe has 25 staff members, of whom 2 are regularly involved in activities related to the electricity ESSDC. In terms of its autonomy, 95% of IndustriAll Europe's budget is based on membership fees. It has a website with a members only section that is used to share internal documents regarding meetings and policy documents and for internal consultations, and it also contains databases for internal use. IndustriAll Europe deals with topics related to the electricity and gas sectors in its Energy Network, as well as in its Industrial Policy Committee, its Collective Bargaining Committee, and its Company Policy Committee.

The promotion of social dialogue at all levels is mentioned in IndustriAll Europe's statutes. IndustriAll Europe acts as an agenda setter in sectoral social dialogue and promotes joint strategies for the

sustainable development of the electricity sector. In addition, its involvement in European sectoral social dialogue is explicitly mentioned in its statutes and clearly indicated in other documents, such as congress documents and its website.

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

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

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

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

IndustriAll Europe has, thus, a well-defined procedure for obtaining a mandate and getting European sectoral social dialogue texts approved by its member organisations. It has the capacity to negotiate binding agreements, such as the NEPSI agreement,⁷³ which does not, however, cover workers in the electricity sector. No binding European sectoral social dialogue agreements have yet been reached specifically for the electricity sector.

As stated in the introduction, the electricity ESSDC produced over 40 joint opinions and agreements between its formal establishment in 2000 and 2021 (Table 40).

Table 40: Joint texts agreed by the representative European social partners for the electricity sector

Date	Topic of the joint opinion or agreement
15 November 2021	Joint statement on just transition
9 April 2020	Joint text on digitalisation
26 July 2018	Joint text on the right qualifications and good working conditions for young workers – A European social partners' roadmap
24 November 2017	Joint statement on just energy transition

⁷³ This is the agreement on the protection of workers' health through the proper handling and use of crystalline silica and products containing it.

27 June 2016	A quality framework for traineeships in the European electricity sector: An agreement of the European social partners in the electricity sector
1 October 2015	Joint position on energy market design
28 September 2015	COP 21 UN Climate Change Conference – Joint position on addressing measures to mitigate social impacts
26 March 2015	Joint opinion on the future of the Energy Community
15 January 2015	Joint framework of actions on competencies, qualifications and anticipation of change in the European electricity sector – First report
14 January 2014	First follow-up of joint position on the social aspects of corporate social responsibility: Positive actions on training/health and safety/equal opportunity and diversity
17 December 2013	Joint position on the 2030 framework for climate and energy policies
18 November 2013	Joint opinion on the impact of energy technologies and innovation on the electricity sector and employment
13 November 2013	Joint opinion on safety and security in the European nuclear industry and consultation of social partners
13 November 2013	Joint opinion on the social dimension of the 2030 framework for energy and climate policies
15 March 2013	Joint response to the consultation paper on the outline of the social strategy of the Energy Community
15 March 2013	Joint framework of actions on competencies, qualifications and anticipation of change in the European electricity sector
15 March 2013	Joint statement on a quality framework for traineeships
6 December 2011	Joint opinion on security and safety in the nuclear industry
14 December 2010	Joint position on smart meters
13 October 2010	Towards a new European energy policy 2011–2020: Draft report of MEP Lena Kolarska-Bobinska
23 June 2010	Joint response to the public consultation ‘Towards a new energy strategy for Europe 2011–2020’
7 May 2009	Policy orientation on the social aspects of corporate social responsibility in the European electricity industry
15 December 2008	Restructuring in the electricity industry: A toolkit for socially responsible restructuring with a best practice guide
15 December 2008	Demographic change in the electricity industry in Europe: Toolkit on promoting age diversity and age management strategies
7 December 2007	Joint declaration on harassment and violence at work
7 December 2007	Joint declaration on employment effects of the opening of electricity and gas markets (ECOTEC study)
7 December 2007	Joint declaration on stress
7 December 2007	Joint opinion on the social aspects of the European energy community (south-east Europe) and the implementation of the memorandum of understanding
13 December 2006	Policy statement on health and safety and training
3 November 2006	Equal opportunities and diversity toolkit/best practices guide
15 December 2004	Joint declaration on work-related stress
15 December 2004	Joint declaration on corporate social responsibility and the European electricity sector
15 December 2004	Joint statement: South-East European Energy Community

22 June 2004	Joint statement on the future skills needs in the European electricity sector
12 June 2003	Joint statement and final report on the study on lifelong learning in the electricity sector
1 June 2003	Joint declaration on equal opportunities/diversity
20 December 2002	Final report on the study on lifelong learning in the electricity sector
13 November 2002	Joint declaration on telework
20 September 2002	Joint declaration on the conference on the social implications of the restructuring of the electricity sector in the candidate countries, 19 and 20 September 2002, Budapest
7 November 2000	Joint declaration on the ECOTEC Study for the European Commission on the social implications of the internal electricity market
27 May 2000	Joint declaration on continuing training
23 February 2000	Rules of procedure of the electricity sector dialogue committee

Source: *European Commission social dialogue texts database*

3.10. Effective participation in ESSDC meetings

Table 41: Effective participation in the ESSDC for the electricity sector, 2018–2019

	2018	2019	Either 2018 or 2019
Member States with trade union participation in the ESSDC for the electricity sector	10 Member States BE, CZ, DE, ES, FR, HU, IT, PT, RO, SI	9 Member States BE, EE, ES, FR, IT, LT, PT, SE, SI,	13 Member States BE, CZ, DE, EE, ES, FR, HU, IT, LT, PT, RO, SE, SI
Member States for which EPSU has an affiliate but there was no participation in the ESSDC	12 Member States AT, BG, CY, EL, FI, HR, IE, LU, LV, MT, NL, SK		
Member States for which IndustriAll Europe has an affiliate but there was no participation in the ESSDC	13 Member States AT, BG, CY, DK, EL, FI, HR, IE, LU, MT, NL, PL, SK		
Member States with employer organisation participation in the ESSDC for the electricity sector	6 Member States BE, FI, FR, IT, LV, SE	9 Member States AT, BE, CZ, FI, FR, HU, IT, LV, SE	9 Member States AT, BE, CZ, FI, FR, HU, IT, LV, SE
Member States for which Eurelectric has an affiliate employer organisation but there was no participation in the ESSDC	14 Member States DE, DK, EE, EL, ES, HR, IE, LT, NL, PL, PT, RO, SI, SK		
Member States for which Eurelectric has an affiliate company but there was no participation in the ESSDC	11 Member States BG, CY, EL, ES, IE, LT, LU, MT, PT, SI, SK		

Source: *Compiled by the authors based on data from the European Commission*

Looking at effective participation in the ESSDC for the electricity sector in 2018 and 2019, the trade union side had participants from 13 Member States and the employer organisation delegation had participants from 9 Member States (Table 41). In each year, three meetings were held: one in spring, one in summer and one in autumn.

Analysing the effective participation of the trade union and employer organisation representatives from the five Member States with the highest employment in the electricity sector (Germany, Poland, France, Italy and Romania), only France and Italy were represented in the ESSDC on both the workers' and the employers' sides. Germany and Romania were represented only by the trade union delegates. Poland is the only country for which neither employer organisation nor trade union delegates attended an ESSDC meeting in the course of 2018 and 2019.

EPSU has an affiliated sector-related trade union in 12 Member States for which there was no trade union representative participating in a meeting of the ESSDC in either 2018 or 2019: Austria, Bulgaria, Croatia, Cyprus, Finland, Greece, Ireland, Latvia, Luxembourg, Malta, the Netherlands and Slovakia. For IndustriAll Europe, this applies to 13 Member States: Austria, Bulgaria, Croatia, Cyprus, Denmark, Finland, Greece, Ireland, Luxembourg, Malta, the Netherlands, Poland and Slovakia).

On the employers' side, Eurelectric affiliates from nine Member States participated in the ESSDC during 2018 and 2019: Austria, Belgium, Czechia, Finland, France, Hungary, Italy, Latvia and Sweden. The number of countries in which Eurelectric has either an affiliated employer organisation or an affiliated company but no recorded participation in the ESSDC meetings is almost double the number that did participate: 18. In addition, however, multinational companies participated in the ESSDC meetings as part of Eurelectric delegations.

Conclusions

The electricity sector employs almost one million people in the EU27. This figure corresponds to 0.55% of the total EU workforce. The sectoral workforce slightly but continually decreased over the decade preceding the COVID-19 pandemic. However, during the pandemic, employment in the electricity sector increased. Given this and the increase in employment likely to be generated by the increased production of renewable electric energy, the expectation is that employment in the sector will increase over the next decade.

In absolute numbers, the electricity sector is larger in Germany, Poland, France and Italy than in the other Member States, accounting for almost 250,000 employees in the first two countries and more than 50,000 in the other two combined. Together, these countries account for a little over 51% of the sectoral workforce in the EU. Romania, Spain and Belgium have more than 30,000 workers each in this sector, while Greece, Austria, the Netherlands, Bulgaria, Czechia and Sweden have over 20,000 each. Another group of five countries employs over 10,000 workers each: Portugal, Croatia, Finland, Slovakia and Ireland. The lowest numbers, from a few hundred to under 10,000, are registered in Malta, Luxembourg, Cyprus, Estonia, Latvia, Lithuania, Slovenia and Denmark. The differences in the numbers of workers in the sector are to be taken into consideration when assessing the industrial relations landscape of the sector and the representativeness of the actors.

The four parts of the electricity sector are production, transmission, distribution and trade of electricity. More than half of the workforce at EU level is employed in production of electricity (55%). Distribution of electricity follows with more than one-quarter of the sectoral workforce (26%). The smallest shares of workforce in this sector are employed in trade (13%) and transmission of electricity (5%).

There are around 150,000 companies active in electricity production, distribution, transmission and trade activities. In contrast to the decrease in employment, the number of enterprises in the sector has tripled over past 10 years. Again, companies active in production of renewable electric energy are a major reason for this increase, as is the liberalisation of the sector.

Despite the fact that almost 98% of the companies in the sector had fewer than 10 employees in 2018, 67% of the sectoral workforce was employed in a company with over 250 employees. Thus, large companies play a strong role in shaping the sector and its industrial relations. This may translate into a high prevalence of company-level bargaining only, as is the case in 12 Member States: Croatia, Cyprus, Estonia, Greece, Ireland, Latvia, Lithuania, Luxembourg, Malta, Portugal, Romania and Spain. It is important to note that this is not the case in any of the four countries with the highest shares of the workforce at EU level. Sweden is the only Member State in which there is no company-level bargaining and only multi-employer bargaining takes place.

This study identified a little over 100 trade unions in all EU Member States; all countries have at least one sector-related trade union, although the number of organisations varies from one to nine. In 13 Member States, there are between one and three trade union organisations in the electricity sector, while in 14 countries there are at least four trade unions organising the workers in the sector. The highest number is registered in Portugal where there are nine trade unions. The pluralism of representation of workers in this sector is caused by occupational divides in 12 countries and by sectoral and ideological differences in 9 Member States. Historical reasons related to differences in

the organisational structures of trade union organisations have resulted in pluralism in Bulgaria, Lithuania, Romania and Slovakia, while differences in territorial coverage have caused fragmentation in Belgium, Bulgaria and Spain.

At least one sector-related employer organisation exists in all Member States except Luxembourg. The number of organisations per country varies between one and four. There is only one organisation representing employers in twelve countries. In eight Member States there are two organisations for sector-related employers, while in Estonia, Germany, Italy and Romania the number of employer organisations is three. The highest numbers are registered in Cyprus and the Netherlands. While ideological differences explain the pluralism in the Netherlands, in Cyprus, as well as in Belgium, Bulgaria, Estonia, Italy and Slovenia, this is caused by the employer organisations covering different parts of the sector. The reason for pluralism among the sectoral employer organisations in Germany, Greece and Sweden is that they represent member companies of different sizes.

As is the case in most sectors with a high prevalence of formerly publicly owned companies, industrial relations are well established in this sector in most countries. Electricity is considered a sector of strategic importance in most Member States, and there is a long and stable history of collective bargaining in all Member States. Almost all trade unions identified in this report (95%) are involved in some form of collective bargaining. The proportion is lower for employer organisations, but nonetheless is close to half (50%).

More than half of the trade unions covered in this study (65%) are consulted by their governments, and the equivalent figure is even higher for the employer organisations (69%). Only in Croatia, Luxembourg and Slovakia are no sectoral trade unions consulted by the government. On the employers' side, no employer organisation from Greece, Hungary, Ireland or Malta is consulted. There is no precise data for Portugal and no employer organisation in Luxembourg.

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

There are 36 trade unions from 25 Member States that are directly or indirectly affiliated to **EPSU**, which represents 34% of the trade unions organising the sector at EU level. The only Member States where EPSU has no members in the sector are Denmark and Poland, with the membership in Greece being unconfirmed. The largest sectoral trade union in 21 Member States is affiliated to EPSU. EPSU members are involved in collective bargaining in all Member States except Greece and Spain, where the trade union's affiliation was not confirmed.

IndustriAll Europe has 57 direct or indirect members in 25 Member States, which represents 54% of the sectoral trade unions. Based on the data collected for this report, there are no members in Latvia or Slovenia. In 20 Member States, the largest trade union in the sector is affiliated to IndustriAll Europe. With the exception of Croatia and Greece, an IndustriAll Europe member is involved in collective bargaining in all the countries in which it has affiliates.

In 15 countries, the same trade union is affiliated to both European organisations. The second largest trade union is affiliated to IndustriAll Europe in 11 countries and to EPSU in 8. In Austria, France, and Italy, the second largest trade union is affiliated to both European organisations.

Of the sector-related trade unions, 33 (31%) in 15 Member States are not affiliated to either EPSU or IndustriAll Europe. Of them, two are affiliated to other international organisations. Only ΓΕΝΟΠ/ΔΕΗ-KHE/GENOP/DEI-KHE in Greece is the largest sectoral trade union in its country. None of the remaining

32 trade unions is the largest in the electricity sector in its country. However, in Cyprus, Czechia, Estonia, Greece, Latvia, Malta, the Netherlands, Poland, Romania, Slovakia and Slovenia the second largest trade union covering the sector is not represented at European level. More of the 33 trade unions cover the private sector than cover the public sector. Only 1 of the 33 trade unions is not involved in collective bargaining.

IndustriAll Europe and **EPSU** both have members in the countries with the highest shares of sectoral employment in the EU, with one exception: there is no EPSU member in Poland. The same is true of the countries with the highest incidence of sectoral employment. This study has not identified other EU trade union organisations as having a similarly high degree of representativeness in the electricity industry. This confirms that **IndustriAll Europe and EPSU are the representative European trade unions for the electricity sector.**

Of the 48 employer organisations, there are 23 **Eurelectric** affiliates in 22 Member States. The countries in which there is no affiliated employer organisation are Bulgaria, Cyprus, Hungary, Luxembourg and Malta. In 20 countries, the Eurelectric affiliate is either the largest or the only employer organisation in the electricity sector. Almost all Eurelectric members organise companies active in production, distribution and trade of electricity. While no Eurelectric member is involved in company-level bargaining, 11 members are involved in multi-employer bargaining, in Austria, Belgium, Czechia, Finland, France, Italy, the Netherlands, Slovakia, Slovenia and Sweden. This coverage indicates that that no other European employer organisation has a comparable degree of representativeness in the electricity sector in the EU and **confirms that Eurelectric is the only representative European employer organisation for the electricity sector.**

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Annex 1: National-level organisations

Table 42: National trade unions active in the electricity sector

MS	Trade union abbreviation/ short name	Full name in original language	Full name in English
AT	GPA-djp	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	Union of Salaried Private Sector Employees, Graphical Workers and Journalists
AT	younion	younion – Die Daseinsgewerkschaft	younion – The Existence Union
AT	PRO-GE	Produktionsgewerkschaft	Production (Manufacturing) Union
BE	ABVV-FGTB Gazelco (ACOD-CGSP)	ABVV-FGTB Gazelco (ACOD-CGSP)	Gazelco Socialist Trade Union for Employees in the Gas and Electricity Sector
BE	ACV-CSC BIE	ACV-CSC Bouw Industrie en Energie	ACV-CSC Construction, Industry and Energy
BE	ACV-CSC CNE	Centrale nationale des employés	National White-Collar Federation
BE	ACLVB-CGSLB	Algemene Centrale der Liberale Vakbonden/Centrale générale des syndicats libéraux de Belgique	General Federation of Liberal Trade Unions
BG	НФЕ/NFEW	Национална федерация на енергетиците	National Federation of Energy Workers
BG	НСФЕБ/ITUFWEI	Независима синдикална федерация на енергетиците в България	Independent Trade Union Federation of Workers in the Energy Industry
BG	ФЕ-Подкрепа/FE-Podkrepa	Федерация Енергетика Подкрепа	Energy Federation Podkrepa
BG	ФАЕ-Подкрепа/FNE-Podkrepa	Федерация Атомна Енергетика Подкрепа	Nuclear Energy Federation Podkrepa
CY	ΕΠΟΠΑΝ-ΟΗΟ-ΣΕΚ/ΕΡΟΡΑΙ-ΟΗΟ- ΣΕΚ	Ελεύθερη Παγκύπρια Οργάνωση Προσωπικού Αρχής Ηλεκτρισμού	Free Pancyprrian Union of Electricity Authority Employees
CY	ΣΗΔΗΚΕΚ-ΠΕΟ/SIDIKEK-ΠΕΟ	Συντεχνία Ημικρατικών, Δημοτικών και Κοινοτικών Εργατοϋπαλλήλων Κύπρου – ΠΕΟ	Cyprus Union of Semi- governmental, Municipal and Local Authority Employees
CY	ΣΕΠΑΗΚ/ΣΕΡΑΙΚ	Συντεχνία Επιστημονικού Προσωπικού Αρχής Ηλεκτρισμού Κύπρου	Union of Professional Employees of the Electricity Authority of Cyprus
CY	ΣΥΒΑΗΚ/SIVAİK	Συντεχνία Υπαλλήλων Βάρδιας Αρχής Ηλεκτρισμού Κύπρου	Shift Employees' Trade Union of the Electricity Authority of Cyprus
CZ	OS ECHO	Odborový svaz ECHO	Trade Union ECHO
CZ	SOSE	Svaz odborových sdružení Energie	Federation of Trade Unions Energie
CZ	ČOSE	Český odborový svaz energetiků	Czech Trade Union of Power Engineers
CZ	OSEH	Odborový svaz energetiky a hornictví	Trade Union of Energy and Mining
DE	ver.di	Vereinte Dienstleistungsgewerkschaft	United Services Union
DE	IGBCE	Industriegewerkschaft Bergbau Chemie Energie	Mining, Chemicals and Energy Workers' Union
DK	DEF	Dansk El-Forbund	Danish Union of Electricians
DK	3F	Fagligt Fælles Forbund	United Federation of Danish Workers
DK	Dansk Metal	Dansk Metal	Danish Metalworkers' Union
DK	IDA	Ingeniørforeningen	Danish Society of Engineers
EE	EEAÜL/AEEWTU	Eesti Energeetikatöötajate Ametiühingute Liit	Association of Estonian Energy Workers' Trade Unions

Representativeness of the European social partner organisations: Electricity sector

MS	Trade union abbreviation/ short name	Full name in original language	Full name in English
EE	KESA	Kaevurite ja Energieetikute Sõltumatu Ametiühing	Independent Trade Union of Miners and Energy Workers
EE	NEAÜ	Narva Energia Ametiühing	Narva Energia Trade Union
EL	ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ/GENOP/ΔΕΙ-ΚΗΕ	Γενική Ομοσπονδία Προσωπικού ΔΕΗ – Κλάδου Ηλεκτρικής Ενέργειας	General Federation of Employees of the Public Power Corporation and Sector of Electric Energy
ES	FI-USO (Sector Energía)	Federación de Industria de Unión Sindical Obrera (Sector Energía)	Federation of Industry of Unión Sindical Obrera (Energy Sector)
ES	UGT-FICA	Union General de Trabajadores Federacion de Industria Construcción y Agro	General Workers' Union, Federation of Industry, Construction and Agriculture
ES	CCOO – Industria	Comisiones Obreras – Industria	Workers' Commissions – Industry
ES	SIE	Sindicato Independiente de la Energía	Free Energy Union
ES	ATYPE-CC	Asociación de Técnicos y Profesionales de la Energía – Colectivo de Cuadros y Profesionales	Association of Technicians and Professionals in Energy, Confederation of Executives and Professional
ES	ELA	Euskal Langileen Alkartasuna	Basque Workers' Solidarity
FI	JHL	Julkisten ja hyvinvointialojen liitto	Trade Union for the Public and Welfare Sectors
FI	Sähköliitto	Sähköalojen ammattiliitto	Finnish Electrical Workers' Union
FI	KTK	KTK Tekniikan Asiantuntijat	Union of Technical Professionals
FI	Finnish Engineers' Association	Suomen Konepaallystoliitto	Finnish Engineers' Association
FI	Pro	Prolitto	Trade Union Pro
FI	YTN	Ylemmät toimihenkilöt	The Federation of Professional and Managerial Staff
FI	TEK Academic Engineers	Tekniikan Akateemiset	Academic Engineers and Architects in Finland
FR	CFE-CGC Energies	Confédération française de l'encadrement – Confédération générale des cadres – Energies	French Confederation of Management – General Confederation of Executives– Energies
FR	Interco-CFDT	Interco – Confédération française démocratique du travail	Interco –French Democratic Confederation of Labour
FR	FNEM-FO	Fédération nationale de l'énergie et des mines – Force ouvrière	National Federation Mines and Energy – Force Ouvrière
FR	FNME-CGT	Fédération nationale mines-énergie – Confédération générale du travail	Mining and Energy Workers' Federation – General Confederation of Labour
FR	CFTC-CMTE	Confédération française des travailleurs chrétiens – Fédération, chimie, mines, textiles, energie	French Christian Workers' Confederation – Chemical, Mining, Textile and Energy Workers' Federation
FR	FCE-CFDT	Fédération Chime-Energie – Confédération française démocratique du travail	Chemical and Energy Workers' Federation – French Democratic Confederation of Labour
FR	UNSA Energie	UNSA Energie	UNSA Energy
FR	SUD Energies	SUD Energies	SUD Energies
HR	HES	Hrvatski elektrogospo-darski sindikat	Croatian Electricity Trade Union
HR	NSRHEP	Nezavisni sindikat radnika Hrvatske elektroprivrede	Independent Trade Union of Workers in the Croatian Electricity Industry
HR	TEHNOS	Strukovni sindikat radnika Hrvatske elektroprivrede	Professional Trade Union of Workers in the Croatian Electricity Industry

Representativeness of the European social partner organisations: Electricity sector

MS	Trade union abbreviation/ short name	Full name in original language	Full name in English
HR	HEDISS	Hrvatski elektrodistribucij-ski sindikat	Croatian Electricity Distribution Trade Union
HR	EKN-HR	Samostalni sindikat radnika u djelatnosti energetike, kemije i nemetala Hrvatske	Autonomous Trade Union of Workers in the Power, Chemistry and Non-Metal Industries of Croatia
HR	SSKH	Samostalni sindikat radnika u komunalnim i srodnim djelatnostima Hrvatske	Autonomous Trade Union of Workers in Public Utilities and Related Services of Croatia
HU	EVDSZ	Egyesült Villamosenergia-ipari Dolgozók Szakszervezeti Szövetsége	Federation of United Trade Unions in the Electric Energy Industry
HU	BDSZ	Bánya-, Energia- és Ipari Dolgozók Szakszervezete	Trade Union of Mining, Energy and Industry Workers
HU	VDSZ	Magyar Vegyipari, Energiaipari és Rokon Szakmákban Dolgozók Szakszervezeti Szövetsége	Hungarian Union of Workers in the Chemical Industry, Energy Industry and Related Professions
IE	SIPTU	Services, Industrial, Professional and Technical Union	Services, Industrial, Professional and Technical Union
IE	Unite	Unite	Unite
IE	ESU	Energy Services Union	Energy Services Union
IE	Connect	Connect	Connect
IT	FILCTEM-CGIL	Federazione italiana lavoratori chimici, tessile, energia, manifatture	Italian Federation of Chemicals, Textile, Energy and Manufacturing Workers
IT	FLAEI CISL RETI	Federazione Lavoratori Aziende Elettriche Italiane	Federation of Workers of Italian Electricity Companies
IT	UILTEC UIL	Unione Italiana Lavoratori Chimica Energia Manifatturiero	Italian Chemicals, Energy and Manufacturing Union
LT	LPPSF/LITUF	Lietuvos pramonės profesinių sąjungų federacija	Lithuanian Federation of Industrial Trade Unions
LT	LEPS Solidarumas	Lietuvos energetikų profesinė sąjunga "Solidarumas"	Lithuanian Energy Trade Union Solidarumas
LU	OGB-L	Syndicat services et énergie de l'OGB-L	Independent Luxembourg Trade Union Confederation – Services and Energy Trade Union
LU	LCGB	Confédération luxembourgeoise des syndicats chrétiens	Luxembourg Confederation of Christian Trade Unions
LV	LAB Energija	Latvijas Arodbiedrība "Energija"	Latvian Trade Union Energija
MT	GWU	General Workers' Union	General Workers' Union
MT	EPOU	Enemalta Professional Officers' Union	Enemalta Professional Officers' Union
NL	FNV Publiek Belang	Federatie Nederlandse Vakbeweging – Publiek Belang	Federation of Dutch Trade Unions – Public Interest
NL	CNV Publieke Diensten	Christelijk Nationaal Vakverbond – Publieke Diensten	National Christian Union – Public Services
PL	SKE NSZZ Solidarność	Sekcja Krajowa Energetyki Niezależnego Samorządnego Związku Zawodowego "Solidarność"	National Section for the Power Industry of the Independent Self-governing Trade Union Solidarity
PL	SKEE	Sekcja Krajowa Elektrowni i Elektrociepłowni NSZZ "Solidarność"	National Section for Power Plants and Heat and Power Plants of the Independent Self-governing Trade Union Solidarity
PL	ZZZE	Zrzeszenie Związków Zawodowych Energetyków	Power Industry Workers' Trade Union Association
PL	ZZiT	Związek Zawodowy Inżynierów i Techników	Trade Union of Engineers and Technicians

Representativeness of the European social partner organisations: Electricity sector

MS	Trade union abbreviation/ short name	Full name in original language	Full name in English
PL	OZZZPRC	Ogólnopolskie Zrzeszenie Związków Zawodowych Pracowników Ruchu Ciągłego	All-Poland Alliance of Trade Unions of Continuous Process Industry Employees
PT	Sindel	Sindicato Nacional da Indústria e Energia	National Industry and Energy Union
PT	Fiequimetal	Federação Intersindical das Indústrias Metalúrgicas, Químicas, Eléctricas, Farmacêutica, Celulose, Papel, Gráfica, Imprensa, Energia e Mina	Federation of Metallurgical, Chemical, Electrical, Pharmaceutical, Pulp, Paper, Printing, Press, Energy and Mining Industries
PT	Fetese	Federação dos Sindicatos da Indústria e Serviços	Federation of Industry and Services Unions
PT	FE	Federação dos Engenheiros	Engineers' Federation
PT	Sirep	Sindicato da Indústria e Energia de Portugal	Portuguese Industry and Energy Union
PT	SISE	Sindicato Independente do Sector Energético	Independent Energy Sector Trade Union
PT	Sinergia	Sindicato da Energia	Trade Union of Energy
PT	Asosi	Associação Sindical dos Trabalhadores do Sector Energético e Telecomunicações	Trade Union Association of Energy and Telecommunications Workers
PT	SIEAP	Sindicato das Indústrias, Energias e Águas de Portugal	Union of Industries, Energy and Water of Portugal
RO	Univers	Federatia Nationala a Sindicatelor din Electricitate "Univers"	National Electricity Trade Union Federation Univers
RO	FSLI Energetica	Federația Sindicatelor Libere Independente "Energetica"	National Free Trade Union Federation Energetica
RO	FNME	Federația Națională Mine Energie	National Mining and Energy Federation
RO	UFS Atlas	Uniunea Federativă Sindicală "Atlas"	Trade Union Federation Atlas
RO	FSLI Petrol-Energie	Federația Sindicatelor Libere și Independente Petrol-Energie	Federation of Free and Independent Trade Unions for Oil and Energy
RO	SHH	Sindicatul Hidroelectrica Hidrosind	Hydroelectric Trade Union Hidrosind
RO	Sindicatul Muntele	Sindicatul Muntele	Trade Union The Mountain
SE	Kommunal	Svenska kommunalarbetareförbundet	Swedish Municipal Workers' Union
SE	Vision	Vision	Vision
SE	SEKO	Service och kommunikationsfacket	Swedish Union for Service and Communications Employees
SE	Sveriges Ingenjörer	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
SE	Unionen	Unionen	Unionen
SE	Elektrikerna	Svenska Elektrikerförbundet	Swedish Electricians' Union
SE	Ledarna	Ledarna	Ledarna
SI	SDE	Sindiklat delavcev dejavnosti energetike	Slovenian Energy Workers' Union
SK	ECHOZ	Energeticko-chemický odborový zväz	Energy and Chemicals Trade Union Association
SK	ZOEZ	Združenie odborárov energetiky Slovenska	Energy Trade Union Association of Slovakia

Source: Network of Eurofound Correspondents, 2020

Table 43: National employer organisations active in the electricity sector

MS	Employer organisation or business association abbreviation/ short name	Full name in original language	Full name in English
AT	OEE	Oesterreichs Energie	Austria's Energy
BE	FEBEG	Federatie van Belgische Elektriciteits- en Gasbedrijven	Federation of Belgian Electricity and Gas Companies
BE	Synergrid	Synergrid	Synergrid
BG	BBCE/ББКЕ	Българска браншова камара на енергетиците	Bulgarian Chamber of the Energy Industry
CY	ΣΕΑΠΕΚ/ΣΕΑΡΕΚ	Σύνδεσμος Εταιρειών Ανανεώσιμων πηγών Ενέργειας Κύπρου	Cyprus Association of Renewable Energy Enterprises
CY	ΣΥΠΑΒΙΚ/SYPABIK	Σύνδεσμος Παραγωγών Βιοκαυσίμων Κύπρου	Cyprus Association of Biogas Energy Producers
CY	ΣΑΕΚ/SAEK	Σύνδεσμος Αιολικής Ενέργειας Κύπρου	Cyprus Wind Energy Association
CY	ΣΣΑΑΗ/SSAAH	Σύνδεσμος Συμμετεχόντων στην Ανταγωνιστική Αγορά Ηλεκτρισμού	Association of Electricity Market Participants
CZ	ČSZE	Český svaz zaměstnavatelů v energetice	Czech Association of Energy Sector Employers
DE	VAEU	Vereinigung der Arbeitgeberverbände energie- und versorgungswirtschaftlicher Unternehmen	Employer's Association of Energy Companies
DE	VKA	Vereinigung der kommunalen Arbeitgeberverbände	Association of Municipal Employers' Associations
DE	BDEW	Bundeswirtschaftsverband der Energie- und Wasserwirtschaft	Federal Association of Energy and Water Industries
DK	Dansk Energi	Dansk Energi	Danish Energy
DK	DI	Dansk Industri	Confederation of Danish Industry
EE	ETL	Eesti Elektritööstuse Liit	Estonian Electrical Industry Association
EE	EPEA	Eesti Päikeseelektri Assotsiatsioon	Estonian Solar Electricity Association
EE	ETEA	Eesti Tuuleenergia Assotsiatsioon	Estonian Wind Power Association
EL	ΣΕΗΕ/HELAS	Σύνδεσμος Επιχειρήσεων Ηλεκτρισμού Ελλάδος	Hellenic Electricity Association
EL	ΕΣΑΗ/HAIPP	Ελληνικός Σύνδεσμος Ανεξαρτήτων Εταιρειών Ηλεκτρικής Ενέργειας	Hellenic Association of Independent Power Producers
ES	AELEC	Asociación de Empresas de Energía Eléctrica	Association of Electric Power Companies
FI	Energiateollisuus	Energiateollisuus	Finnish Energy Industries
FR	UFE	Union Française de l'Electricité	Electricity French Union
HR	UP HEP	Udruga poslodavaca Hrvatske elektroprivrede	Employers Organisation of the Croatian Electricity Industry
HR	Croatian Chamber of Economy	Hravtska Gospodarska Komora	Croatian Chamber of Economy
HU	VTMSZ	Vezetési Tanácsadó Magyarországi Szövetege	Association of Management Consultants in Hungary
HU	EMT	Eurelectric Magyarországi Tagozat	Hungarian Chapter of Eurelectric
IE	EAI	Electricity Association of Ireland	Electricity Association of Ireland
IT	Energia Libera	Energia Libera	Free Energy

Representativeness of the European social partner organisations: Electricity sector

IT	Elettricità Futura	Elettricità Futura – Unione delle Imprese Elettriche Italiane	Future Electricity – Union of Italian Electric Companies
IT	Utilitalia	Utilitalia	Utilitalia
LT	NLEA	Nacionalinė Lietuvos energetikos asociacija	National Energy Association of Lithuania
LV	LEEA	Latvijas Elektroenerģētiku un Energobūvnieku asociācija	Latvian Association of Power Engineers and Energy Constructors
MT	MEA	Malta Employers' Association	Malta Employers' Association
NL	Energie Nederland	Energie Nederland	Energy Netherlands
NL	Netbeheer Nederland	Netbeheer Nederland	Net Governance Netherlands
NL	NVDE	Nederlandse Vereniging Duurzame Energie	Dutch Association for Sustainable Energy
NL	WENB	Werkgeversvereniging Energiebedrijven en Nutsbedrijven	Employers' Association for Energy and Utilities Enterprises
PL	PKEE	Polski Komitet Energii Elektrycznej	Polish Electricity Association
PL	ZPEP	Związek Pracodawców Energetyki Polskiej	Association of the Polish Power Industry Employers
PT	Elecpor	Associação Portuguesa das Empresas do Sector Eléctrico	Portuguese Association of Companies in the Electrical Sector
RO	FP Energetica	Federația Patronală Energetica	Employers' Organisation Energetica
RO	ACUE	Federația Asociațiilor Companiilor de Utilități din Energie	Federation of Associations of Energy Utility Companies
RO	IRE	Institutul National Roman pentru Studiul Amenajării și Folosirii Surselor de Energie	Romanian National Institute for the Study of Planning and Use of Energy Sources
SE	EFA	Energiföretagen Sverige	Swedenergy
SE	Sobona	Sobona	Sobona
SI	ZDS	Združenje Delodajalcev Slovenije	Association of Employers of Slovenia
SI	EZS	Energetska Zbornica Slovenije	Energy Industry Chamber of Slovenia
SK	ZZES	Zväz zamestnávateľov energetiky Slovenska	Union of Employers in the Power Industry in Slovakia

Source: Network of Eurofound Correspondents, 2020

Annex 2: The electricity sector in the UK

Table 44: National trade unions in the UK

Organisation	EU affiliation	Collective bargaining	Consultation on working conditions
GMB	EPSU, IndustriAll Europe	Yes	Ad hoc
Prospect	EPSU	Yes	Ad hoc
Unison	EPSU	Yes	Ad hoc
Unite	EPSU, IndustriAll Europe	Yes	Ad hoc
PCS	EPSU	Yes	Ad hoc
FDA	EPSU	Yes	Ad hoc

Source: Network of Eurofound Correspondents, 2020

Table 45: National employer organisations in the UK

Organisation	Type	EU affiliation	Collective bargaining	Consultation on working conditions
ENA	Business association	Eurelectric	No	Regular
Energy UK	Business association	Eurelectric	No	Regular

Source: Network of Eurofound Correspondents, 2020

Table 46: Sector-related trade unions affiliated to EPSU in the UK

Trade unions affiliated to EPSU	Trade unions not affiliated to EPSU	Is the trade union with the most members in the sector affiliated to EPSU?
GMB, Prospect, Unison, Unite, PCS, FDA	None	Yes (Unite)

Source: Network of Eurofound Correspondents, 2020

Table 47: Sector-related trade unions affiliated to EPSU in the UK: coverage and rankings

Trade unions affiliated to EPSU	Coverage of NACE 35.1	Private and public sector coverage	Ranking by size
Unite	All	Private only	1
Prospect	All	Private only	2
GMB	All	Private only	3
Unison	All except production	Private only	4
PCS	No clear data	Both private and public	5
FDA	No clear data	Both private and public	6

Source: Network of Eurofound Correspondents, 2020

Table 48: Sector-related trade unions affiliated to IndustriAll Europe in the UK

Trade unions affiliated to IndustriAll Europe	Trade unions not affiliated to IndustriAll Europe	Is the trade union with the most members in the sector affiliated to IndustriAll Europe?
GMB, Unite	Prospect, Unison, PCS, FDA	Yes (Unite)

Source: Network of Eurofound Correspondents, 2020

Table 49: Sector-related trade unions affiliated to IndustriAll Europe in the UK: coverage and rankings

Trade unions affiliated to IndustriAll Europe	Coverage of NACE 35.1	Private and public sector coverage	Ranking by size
Unite	All	Private only	1
GMB	All	Private only	3

Source: Network of Eurofound Correspondents, 2020

Table 50: Sector-related employer associations affiliated to Eurelectric in the UK

Employer associations affiliated to Eurelectric	Employer associations not affiliated to Eurelectric	Is the employer association with most members in the sector affiliated to Eurelectric?
ENA, Energy UK	None	Yes (Energy UK)

Source: Network of Eurofound Correspondents, 2020

Table 51: Sector-related employer associations affiliated to Eurelectric in the UK: coverage and rankings

Employer associations affiliated to Eurelectric	Coverage of NACE 35.1	Private and public sector coverage	Ranking by size
Energy UK	All	Private only	1
ENA	All except trade	Private only	2

Source: Network of Eurofound Correspondents, 2020

Annex 3: Additional information about the sector

Table 52: Employees in NACE 35.1 and share of employment at national and EU27 levels, 2018

Member State	Employment in NACE 35.1	% of sectoral employment in the total national workforce	% of sectoral employment in the total EU27 sectoral workforce
Germany	338,326	0.86	32.32
France	125,142	0.47	11.95
Poland	9,0776	0.57	8.67
Italy	6,8070	0.30	6.50
Romania	45,113	0.54	4.31
Spain	37,873	0.20	3.62
Belgium	30,753	0.66	2.94
Greece	29,988	0.80	2.86
Austria	28,547	0.70	2.73
Netherlands	28,200	0.35	2.69
Bulgaria	27,851	0.92	2.66
Czechia	25,925	0.51	2.48
Sweden	25,849	0.54	2.47
Hungary	19,806	0.45	1.89
Portugal	12,593	0.28	1.20
Croatia	11,677	0.73	1.12
Finland	11,663	0.49	1.11
Slovakia	10,724	0.43	1.02
Ireland	10,000	0.47	0.96
Denmark	7,811	0.30	0.75
Slovenia	7,483	0.79	0.71
Lithuania	7,384	0.56	0.71
Latvia	5,357	0.62	0.51
Estonia	3,365	0.54	0.32
Cyprus	2,129	0.55	0.20
Luxembourg	1,250	0.45	0.12
Malta	920	0.40	0.09
EU27	1,046,825	0.55	100.00

Notes: Ordered by number of NACE 35.1 employees; the percentages shaded green indicate countries where NACE 35.1 employees make up a higher proportion than 0.55% (the EU average) of the entire national workforce. These are the countries for which the electricity sector is most important in terms of employment.

Sources: Eurostat, SBS and EU-LFS, extracted 20 October 2021, except for France, Ireland, Luxembourg, Malta and the Netherlands, for which data were provided by the national correspondents

Table 53: Number of employees in companies in NACE 35.1, by size, EU27, 2011–2017

Year	Total number of companies	Companies with 0–9 employees	Companies with 10–19 employees	Companies with 20–49 employees	Companies with 50–249 employees	Companies with over 250 employees
2011	1,110,000	50,913	:	43,653	142,896	851,953
2012	1,100,000	56,063	17,359	45,463	148,000	838,424
2013	1,080,000	53,000	17,959	43,740	145,612	824,163
2014	1,110,000	70,000	19,064	44,516	145,263	832,213
2015	1,090,709	71,000	:	45,799	149,831	803,576
2016	1,090,000	83,000	20,133	46,738	148,312	794,937
2017	1,160,000	84,607	:	45,066	149,650	856,917

Note: ‘:’, no data available.

Source: Eurostat, SBS, extracted 7 January 2021

Table 54: Are the largest and second largest national-level trade unions affiliated to EPSU or IndustriAll Europe?

MS	Largest trade union	Is the largest affiliated to EPSU?	Is the largest affiliated to IndustriAll Europe?	Second largest trade union	Is the second largest affiliated to EPSU?	Is the second largest affiliated to IndustriAll Europe?	Do the trade unions affiliated to EPSU and IndustriAll Europe cover the entire electricity sector?	Significance of non-affiliated trade unions
AT	GPA-djp	Yes	No	younion	Yes	Yes	Yes	None
BE	ACV-CSC BIE	No	Yes	ABVV- FGTB Gazelco (ACOD- CGSP)	Yes	No	Yes	None
BG	НФЕ/ NFEW	Yes	No	НСФЕБ/ ITUFWEI	Yes	No	Yes	Very small; they are small trade unions at company level
CY	ΕΠΟΠΑΗ -ΟΗΟ- ΣΕΚ/ ΕΡΟΡΑΙ- ΟΗΟ-ΣΕΚ	Via ΟΗΟ	Yes	ΣΗΔΗΚΕΚ -ΠΕΟ/ SIDIKEK- PEO	No	No	No	These trade unions are smaller than the IndustriAll Europe and EPSU members; however, they make up 40% of the Electricity Authority of Cyprus's employees
CZ	OS ECHO	Yes	Yes	ČOSE	No	No	Yes	ČOSE and OSEH: they are small but not insignificant
DE	ver.di	Yes	No	IGBCE	No	Yes	Yes	None
DK	IDA	No	Yes	DEF	No	Yes	Yes	None
EE	EEAÜL/ AEEWTU	Yes	Yes	NEAÜ	No	No	Yes	They are large and important trade

Representativeness of the European social partner organisations: Electricity sector

MS	Largest trade union	Is the largest affiliated to EPSU?	Is the largest affiliated to IndustriAll Europe?	Second largest trade union	Is the second largest affiliated to EPSU?	Is the second largest affiliated to IndustriAll Europe?	Do the trade unions affiliated to EPSU and IndustriAll Europe cover the entire electricity sector?	Significance of non-affiliated trade unions
								unions in terms of members covered
EL	ΓΕΝΟΠ/ΔΕΗ-ΚΗΕ/ GENOP/ DEI-KHE	Not confirmed	No		No	No	Yes	n.d.
ES	UGT-FICA	Yes	Yes	CCOO – Industria	No	Yes	Yes	Despite no membership data for the unaffiliated trade unions, they are the third (or fourth, this is not clear) and the fifth largest union in the sector
FI	TEK Academic Engineers	No	Yes	Sähköliitto	No	Yes	Yes	The two unaffiliated unions are rather small
FR	FNME-CGT	Yes	Yes	CFE-CGC Energies	Yes	Yes	Yes	The unaffiliated unions are rather small
HR	HES	Yes	Yes	NSRHEP	Yes	No	Yes	The unaffiliated unions are rather small
HU	EVDSZ	Yes	Yes	BDSZ	No	Yes	Yes	None
IE	Unite	Yes	Yes	ESU	Yes	No	Yes	None
IT	FLAEL CISL RETI	Yes	Yes	FILCTEM- CGIL	Yes	Yes	Yes	None
LT	LPPSF/ LITUF	Yes	Yes	LEPS Solidarumas	No	Yes	Yes	None
LU	OGB-L	Via OGB-L	Yes	LCGB	No	Yes	Yes	None
LV	LAB Energija	Yes	No	Only one trade union	No second trade union	No second trade union	Yes	None
MT	GWU	Yes	Yes	EPOU	No	No	No	EPOU represents the category of professional employees
NL	FNV Publiek Belang	Yes	Yes	CNV Publieke Diensten	No	No	Yes	They are trade unions with very low membership
PL	SKE NSZZ Solidarność	No	Via SGiE NSZZ Solidarność	ZZZE	No	No	Yes	They are relatively large and play an important role; however, SGiE (SKE + SKEE) is the largest
PT	Sindiel	Yes	Yes	Fiequimetal	No	Yes	Yes	They are small or very small unions
RO	Univers	Yes	No	FNME	No	Currently suspended	Yes	They are the second and the third largest organisations in the sector; both are also representative

Representativeness of the European social partner organisations: Electricity sector

MS	Largest trade union	Is the largest affiliated to EPSU?	Is the largest affiliated to IndustriAll Europe?	Second largest trade union	Is the second largest affiliated to EPSU?	Is the second largest affiliated to IndustriAll Europe?	Do the trade unions affiliated to EPSU and IndustriAll Europe cover the entire electricity sector?	Significance of non-affiliated trade unions
								according to the national legal criteria at the sector level
SE	Unionen	No	Yes	SEKO	Yes	No	Yes	Both trade unions are small; SEF generally organises electricians, whereas Ledarna organises managers in all sectors
SI	SDE	Yes	No	Only one trade union	No	No	Yes	None
SK	ECHOZ	Yes	Yes	ZOEZ	No	No	No	Around 42% of employees in the electricity sector are represented by ZOES

Note: Green shading indicates largest trade union; blue shading indicates second largest trade union.

Source: Network of Eurofound Correspondents, 2020

Table 55: Are the largest and second largest national-level employer organisations affiliated to Eurelectric?

	Largest EO/BA	Is the largest affiliated to Eurelectric?	Second largest EO/BA	Is the second largest affiliated to Eurelectric?	Do the EOs affiliated to Eurelectric cover the entire electricity sector?	Significance of non-affiliated EOs
AT	OEE		Only one		Yes	None
BE	FEBEG		Synergrid		No	Synergrid is the second largest and covers all parts of the sector
BG	ББКЕ/BBCE		Only one		Yes	None
CY	ΣΕΑΠΕΚ/ΣΕΑΡΕΚ		ΣΣΑΑΗ/SSAAH		No	No EO, only BA
CZ	ČSZE		Only one		Yes	Not the case
DE	VKA		VAEU		No	None of the EOs in the sector is unaffiliated; the EOs cover all parts of the sector
DK	Dansk Energi (BA not EO)		DI		No	DI is the only EO
EE	ETL		EPEA		No	The unaffiliated organisation is a BA
EL	ΣΕΗΕ/HELAS		ΕΣΑΗ/HAIPP		Yes	ΕΣΑΗ/HAIPP is an EO
ES	AELEC		Only one		Yes	None

Representativeness of the European social partner organisations: Electricity sector

	Largest EO/BA	Is the largest affiliated to Eurelectric?	Second largest EO/BA	Is the second largest affiliated to Eurelectric?	Do the EOs affiliated to Eurelectric cover the entire electricity sector?	Significance of non-affiliated EOs
FI	Energiatollisuus		Only one		Yes	None
FR	UFE		Only one		Yes	None
HR	UP HEP		Only one		No	None
HU	VTMSZ		Only one		No	None
IE	EAI		Only one		Yes	None
IT	Elettricità Futura		Energia Libera		No	The unaffiliated EOs are important organisations for the sector
LT	NLEA		Only one		Yes	None
LU	None					
LV	LEEA		Only one		Yes	None
MT	MEA		Only one		No	None
NL	WENB		Energie Nederland		Yes	The largest is unaffiliated
PL	ZLEP		PKEE		Yes	The largest is unaffiliated
PT	Elecpor		Only one		No	None
RO	IRE		ACUE		Yes	The second largest is unaffiliated
SE	EFA		Sobona		Yes	The second largest is unaffiliated
SI	ESZ		ZDS		Yes	The second largest is unaffiliated
SK	ZZES		Only one		Yes	None

Note: BA, business association; EO, employer organisation.

Source: Network of Eurofound Correspondents, 2020

Table 56: Examples of national companies indirectly affiliated to Eurelectric through national employer organisations (non-exhaustive list)

MS	Company name	% of workforce employed	National EO affiliation	Affiliation of the national EO to Eurelectric	Parts of the electricity sector covered						Other sectors	Involvement in CB	
					NACE 35.11	NACE 35.12	NACE 35.13	NACE 35.14	Public	Private		Sectoral level	Company level
AT	Salzburg AG	< 5%	OEE	Via OEE									
BG	Bulgarian Energy Holding	> 50%	BBCE-BIA-UBB									Via BBCE	
	EMI ⁷⁴	n.d.		EMI is affiliated as an NGO									
CY	Electricity Authority of Cyprus	2,145 employees	OEB and CCCI	Electricity Authority of Cyprus is a government body, not an EO									
EL	PPC SA	80%	ΣΕΗΕ/HELAS	Via ΣΕΗΕ/HELAS									
	Protergia/Mytilineos	316 employees	MYTILINEOS										
ES	Ormazabal	0.93%	CEOE	Not a member; a BA									
IE	ESB Group	~70% (7,000 employees)	EAI	Via EAI									
	Eirgrid	~4% (400 employees)											
	SSE Airtricity	~10% (1,000 employees)	EAI	Via EAI									
IT	Edison S.p.A.	3%	Confindustria										
	Enel	Largest	Elettricità Futura	Via Elettricità Futura									
	Gestore Servizi Energetici	Large for transmission											
	Terna S.p.A	Large											

⁷⁴ EMI Bulgaria is a non-governmental organisation.

Representativeness of the European social partner organisations: Electricity sector

LT	Ignitis ⁷⁵	> 50%	NLEA	Via NLEA										
LU	Encevo	80%												
MT	Enemalta plc	65%	MEA											
	ERL	75%	MEA											
PT	EDP	48% (6,000 employees)	CIP, Elecpor	Via Elecpor										
	EDA	8% (1,032 employees)	Elecpor	Via Elecpor										
	EEM	5% (680 employees)	Elecpor	Via Elecpor										
	REN	5% (691 employees)	CIP											
SI	Elektro Gorenjska	4% (282 employees)	EZS	Via EZS										
SK	SE Slovenské elektrárne, a.s.	36%	RUZ											
	VSE H	n.d.	RUZ, Amcham											
	SSE	3%	AZZZ SR via ZZES											
	SEPS	6%	AZZZ SR via ZZES, SEZKEZ											

Notes: The companies active in the electricity sector included in this table are indirectly affiliated to Eurelectric. However, there are many more companies that are part of national employer organisations and as such also represented by Eurelectric. In the 'Other sectors' column, green shading is used for gas and purple shading is used for all other sectors. n.d., no data available.

Source: Network of Eurofound Correspondents, 2020

⁷⁵ The Ignitis group includes Ignitis gamyba, AB (the largest company in production), and Ignitis, UAB (the largest company in trading).

Annex 4: Network of Eurofound Correspondents

Table 57: National correspondents who contributed to this report

Country	Correspondent(s)	Organisation
AT	Bernadette Allinger	Working Life Research Centre
BE	Dries Van Herreweghe	HIVA Research Institute, KU Leuven
BG	Ekaterina Ribarova	Institute of Social and Trade Union Research
CY	Pavlos Kalosinatos	Cyprus Labour Institute – Pancyprian Federation of Labour
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	German Economic Institute
	Birgit Kraemer	Institute for Economic and Social Research, Hans Boeckler Foundation
DK	Carsten Jorgensen	FAOS, University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Penny Georgiadou	GSEE Labour Institute
ES	Oscar Molina	Institute for Labour Studies, Autonomous University of Barcelona
FI	Amanda Kinnunen	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejakovic	Institute of Public Finance
	Irena Klemencic	
HU	Nóra Krokovay	Kopint-Tárki Institute for Economic Research
IE	Colman Higgins	IRN Publishing
IT	Anna Mori	Department of Social and Political Sciences, University of Milan
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research
LV	Krišs Karnītis	EPC Ltd
MT	Louis Grech	University of Malta
NL	Amber van der Graaf	Panteia BV
PL	Barbara Surdykowska	Foundation Institute of Public Affairs
PT	Reinhard Naumann	Friedrich Ebert Foundation, Lisbon
RO	Victoria Stoiciu	European Institute of Romania
	Nicoleta Voicu	
SE	Sirin Celik	Oxford Research AB
SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Miroslava Kordošová	Institute for Labour and Family Research
UK	Claire Evans	Warwick Business School

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

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the EU Member States. This study identifies IndustriALL and EPSU as the representative social partner organisations for the trade unions and Eurelectric as the representative social partner organisation for the employers in the electricity sector.

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

