



**Representativeness of the
European social partner organisations:
Extractive industries sector**

This study provides information designed to encourage sectoral social dialogue in the extractive industries sector. The aim of Eurofound's series of representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. Top-down and bottom-up analyses of the extractive industries sector in the EU28 covered in the study show that IndustriALL Europe, Euromines, EURACOAL, IMA Europe and UEPG are the most important European level social partner organisations in the sector. The contribution of APEP to the collective representativeness is limited to three companies, each of which are also affiliated to members of Euromines.

Introduction

Objectives of the study

The aim of this representativeness study is to identify the sector-related national and supranational social partners – that is, the trade unions and employer organisations – in the field of industrial relations in the extractive industries sector, and to show how these actors relate to the sector’s European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, arises from the aim of the European Commission to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU).

Sectoral Social Dialogue Committee

European social dialogue refers to discussions, consultations, negotiations and joint actions involving organisations representing the two sides of industry (employers and workers). In accordance with Article 154 of the TFEU, sectoral social dialogue committees at the European level provide for the autonomous work of social partners and a mechanism for the European Commission to consult ‘management and labour’ on developments and initiatives having social implications for the sector. The effectiveness of the European social dialogue depends on whether its participants are sufficiently representative in terms of the sector’s national actors across the EU Member States. Only European associations that meet this precondition will be admitted to the European social dialogue.

For the extractive industries sector, the Sectoral Social Dialogue Committee consists of IndustriALL Europe on the workers’ side and the European Association of Mining Industries (Euromines), European Association for Coal and Lignite (EURACOAL), European Industrial Minerals Association (IMA Europe), European Aggregates Association (UEPG) and European Association of Potash Producers (APEP) on the employers’ side.

Social dialogue in this sector covers:

- mining of hard coal, lignite, iron and non-ferrous metal ores, and minerals;
- extraction of peat and salt;
- other mining and quarrying and support activities.

Eurofound’s **standard methodology** identifies the sector to be studied in terms of the Classification of Economic Activities in the European Community (**NACE**). For the extractive industries sector, this covers the following NACE Rev. 2 divisions:

- 05 Mining of coal and lignite;
- 07 Mining of metal ores;
- 08 Other mining and quarrying;
- 09 Mining support service activities.

Table 1 provides a more detailed description of each division. These divisions are all part of NACE Section B Mining and quarrying, which includes the extraction of minerals occurring naturally as solids (coal and ores), liquids (petroleum) or gases (natural gas). Mining activities are classified into divisions, groups and classes on the basis of the principal mineral produced. This study excludes Division 06: Extraction of crude petroleum and natural gas.

Table 1: Description of relevant NACE divisions

Division	Description
05: Mining of coal and lignite	This division includes the extraction of solid mineral fuels through underground or opencast mining and includes operations (for example, grading, cleaning, compressing, and other steps necessary for transportation) leading to a marketable product. This division does not include coking (19.10), services incidental to coal or lignite mining (09.90) or the manufacture of briquettes (19.20).
07: Mining of metal ores	This division includes mining for metallic minerals (ores), performed through underground or opencast extraction, seabed mining and so on. This division also includes ore dressing and beneficiating operations, such as crushing, grinding, washing, drying, sintering, calcining or leaching ore, gravity separation or flotation operations. It excludes roasting of iron pyrites (20.13), production of aluminium oxide (24.42) and operation of blast furnaces (division 24).
08: Other mining and quarrying	This division includes extraction from a mine or quarry, but also dredging of alluvial deposits, rock crushing and the use of salt marshes. The products are used most notably in construction (for example, aggregates, sands and stones), manufacture of materials (for example, clay, gypsum and calcium) and the manufacture of chemicals. This division does not include processing (except crushing, grinding, cutting, cleaning, drying, sorting and mixing) of the minerals extracted.
09: Mining support service activities	This division includes specialised support services incidental to mining provided on a fee or contract basis. It includes exploration services through traditional prospecting methods such as taking core samples and making geological observations as well as drilling, test drilling or re-drilling for oil wells, metallic and non-metallic minerals. Other typical services cover: <ul style="list-style-type: none"> • building oil and gas well foundations; • cementing oil and gas well casings; • cleaning, bailing and swabbing oil and gas wells; • draining and pumping mines; • overburden removal services at mines.

Demarcation of the study

European associations

European associations are included in this representativeness study if they are on the Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 TFEU, and/or they participate in the sector-related European social dialogue.

The Commission may also decide to include other EU sector-related organisations in the study, if relevant, for example, a sector-related organisation that has recently requested to be consulted under Article 154 TFEU. Within the framework of this study, no such request was made by the European Commission to include other organisations. The definition of sector-relatedness is given in the Eurofound's description of the [methodology for representativeness studies](#).

This is the top-down approach. The national affiliates of these European associations are all included in the assessments made in this study.

National associations

A national association is considered as a relevant sector-related interest association (in the bottom-up approach in this study) if it meets both criteria A and B:

- A. The association's domain relates to the sector;
- B. The association is either affiliated with a European-level organisation or is regularly involved in sector-related collective bargaining.

Employment and economic trends

Employment and company characteristics

European Union Labour Force Survey (EU-LFS) data from Eurostat show that the sector employed 738,000 people in 2013.

Table 2 shows the details of employment and its relative importance in the total employment of each country; these shares are quite low, generally less than 1%. Only Bulgaria, Estonia and Poland show rates of more than 1%. Furthermore, the share of female employees is very low, generally below 20%. Slovakia had the lowest female participation (4.8%) in 2013. An exception is Romania which reported 83.1% female employment in the sector.

Table 2: Employment in the extractive industries sector, 2008–2013

	Total employment in 2013	Difference between 2008 and 2013 (%)	Share of female employment in 2013 (%)	Share of sectoral employment as a percentage of total employment, 2013	Source
AT	6,069	-4.3	13.6	0.2	Statistik Austria: Leistungs- und Strukturstatistik ab 2008, and own calculations
BE	13,902 ^a	19.7	7.0	0.3	National Social Security Office, National Institute for the Social Security of the Self-employed and Statistics Belgium from Federal Public Service for the Economy, SMEs, Self-employed and Energy
BG	24,518	-17.6	17.8	1.0	National Statistical Institute (NSI)
CY	428	-45.3		0.1	Statistical Service of Cyprus (CYSTAT)
CZ	39,600	-26.7	11.4	0.8	LFS
DE	78,000 ^b	-15.2	9.0	0.2	Micro census by the Federal Statistical Office (destatis)

DK	2,196	-30.2	16.4	0.1	Statistikbanken.dk, RAS 300
EE	5,104 ^c	-3.9		1.2	Statistics Estonia on the basis of annual statistical questionnaire 'EKOMAR'
EL	10,271	-40.0	6.5	0.3	ELSTAT 2nd quarter 2013
ES	28,700	-41.5	13.9	0.1	Spanish LFS (Encuesta de Población Activa, EPA)
FI	5,669 ^d	16.8	11.7	0.2	Official Statistics of Finland (OSF): employment
FR					
HR	4,364 ^e	-37.5	11.4	0.4	Croatian Bureau of Statistics, 2014
HU	7,500	-11.8	14.7	0.2	Hungarian Central Statistical Office (KSH)
IE	5,093 ^f				Quarrying: Central Statistics Office (CSO) Mining: Assessment of Economic Contribution of Mineral Exploration and Mining in Ireland (PDF)
IT	19,671 ^d	-21.6	9.5	0.1	National Institute of Statistics (Istat): National Structural Business Statistics
LT					
LU	275 ^d	-13.2			General Social Security Inspectorate (IGSS)
LV	3,072	0.1	25.5	0.3	Central Statistical Bureau of Latvia (CSP): annual survey of enterprises and institutions
MT	293 ^g	-28.9	7.5	0.2	Employment and Training Corporation (ad hoc request)

NL	10,900 ^h	60.3	11.1	0.1	CBS Statline (Delfstoffenwinning; financiële gegevens)
PL	257,600	0.9	9.3	1.7	Eurostat
PT	12,848 ⁱ	-28.4	10.4	0.3	Censos 2011
RO	63,300	-22.2	83.1 ^j	0.7	National Institute of Statistics (INSSE)
SE					
SI	2,644	-22.7	12.6	0.3	Statistical Register of Employment (SRDAP)
SK	10,500	-19.2	4.8	0.5	LFS (Statistical Office of the Slovak Republic, ŠÚ SR)
UK	111,150	156.1	17.9	0.4	LFS (Office for National Statistics, ONS)

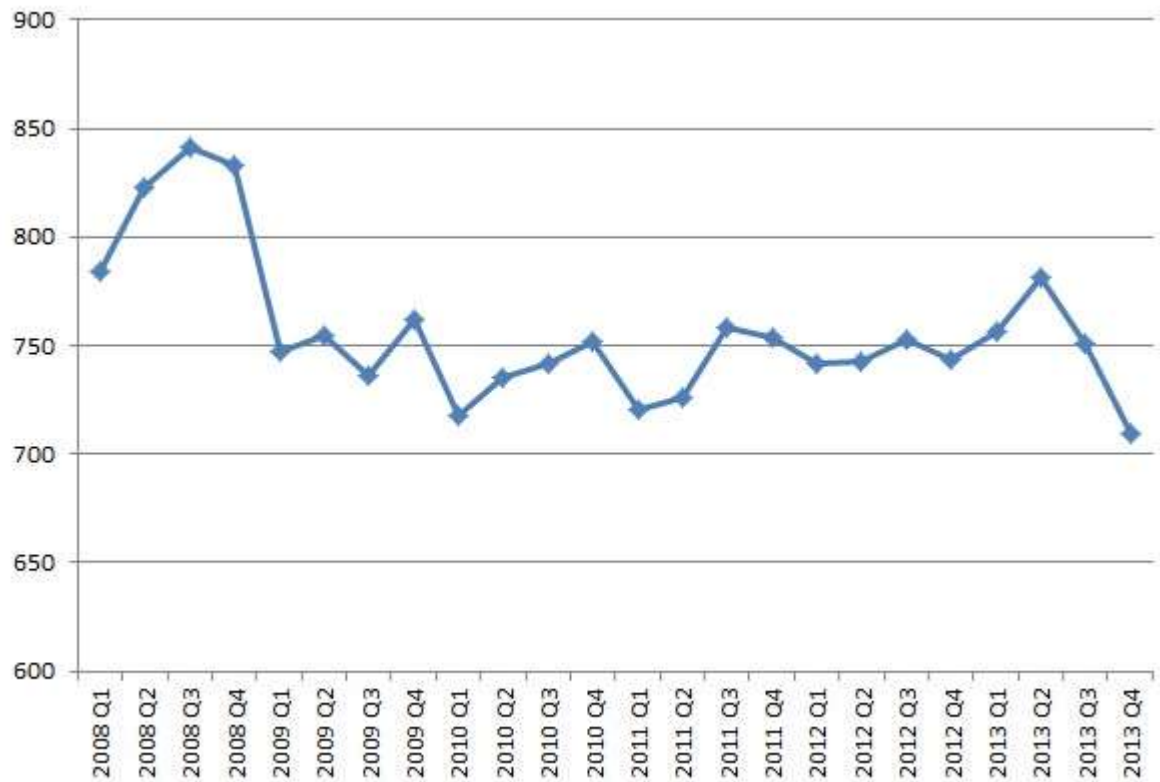
Notes: ^a 3,128 employees + 10,774 self-employed. Through UEPG, its Belgian affiliate Fediex indicated that this number might not be correct. At the time of writing UEPG had not provided an alternative number. ^b Refers to NACE classification WZ2008 (after census corrections). ^c Includes NACE B Division 06. ^d Reference year 2012. ^e Temporary agency workers not included; however, their numbers are low, especially in this sector. ^f 4,000 in quarrying (2012); 1,093 in mining (2011). ^g Refers to full-time employment. ^h Reference year 2012; includes only NACE B Divisions 08 + 09 since Divisions 05 + 07 do not exist in the Netherlands. ⁱ Reference year 2011. ^j The fact that many of the extraction sites were currently closed generated a distinct gender distribution of employment: over 80% are female employees in the extractive industries sector in Romania. This situation is telling of the administrative approach of the remaining companies in the field – most of which export raw materials rather than processed exports. As such, a much higher share of the companies' activity is dedicated to office tasks, such as international sales, than to the extraction process itself.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Recent employment trends at EU and Member State level

Figure 1 shows the volatile nature of employment in the sector over the period 2008 to 2013. The level of employment by the end of 2013 was 709,000 compared with 784,400 in the first quarter of 2008.

Figure 1: Evolution of employment 2008–2013 (in thousands)

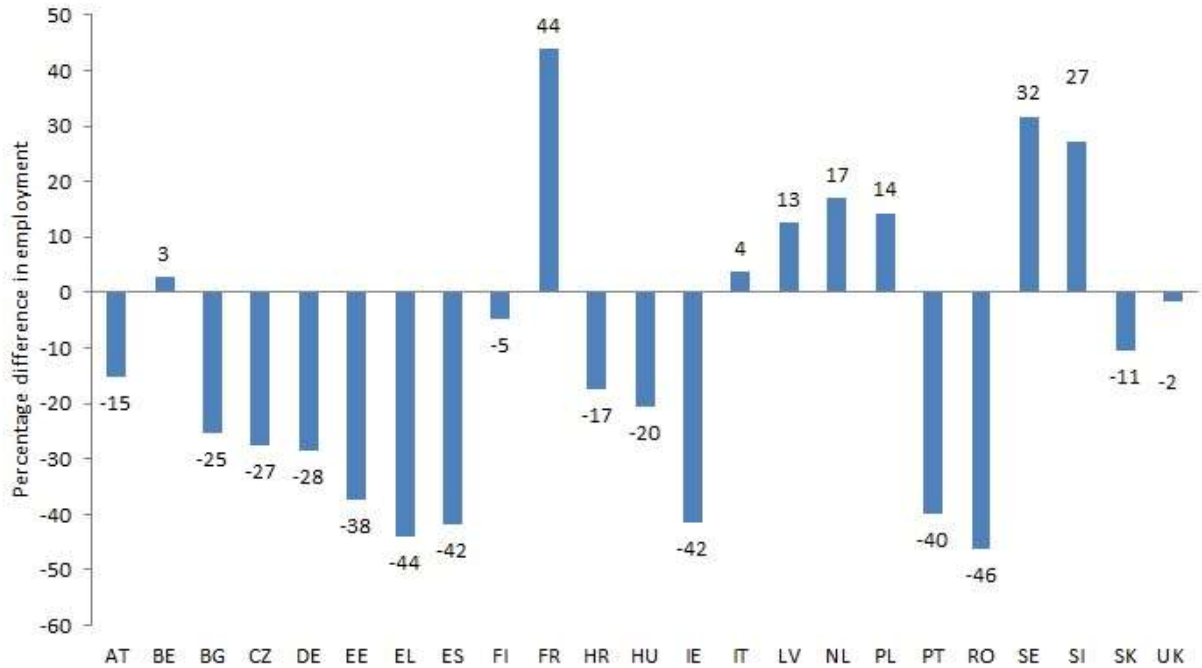


Note: Covers NACE (Rev. 2) Divisions 05, 07, 08 and 09.

Source: EU-LFS

Looking into the employment trends at the Member State level, Figure 2 shows most countries experienced significant declines in employment between 2008 and 2013. Only Belgium, France, Italy, Latvia, Netherlands, Poland, Slovenia and Sweden showed an increase in employment over this period.

Figure 2: Difference in employment, 2008–2013 (%)



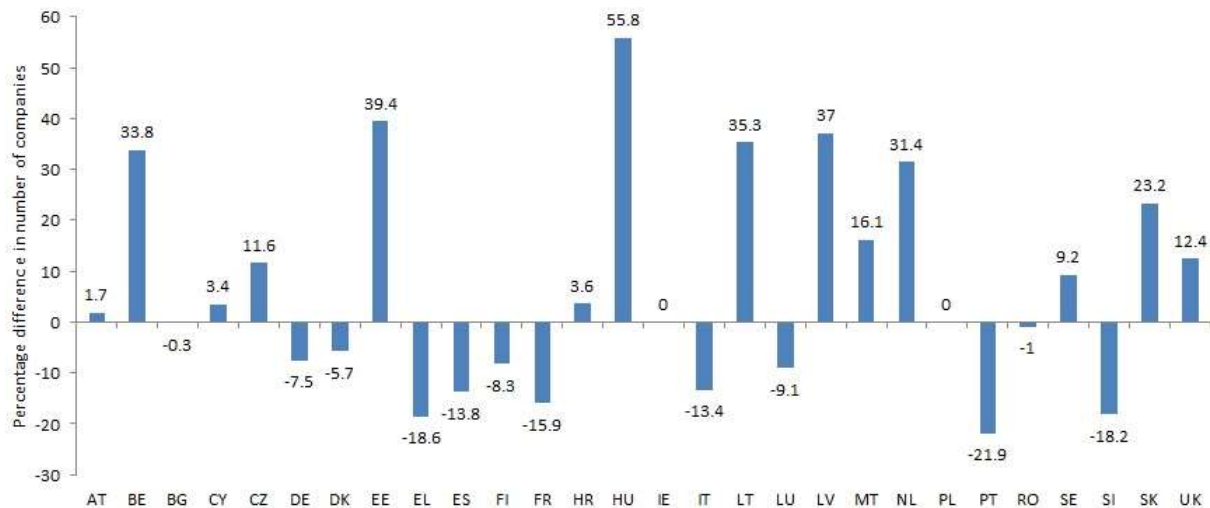
Notes: Covers NACE (Rev. 2) Divisions 05, 07, 08 and 09.

This figure is based on EU-LFS data and does not correspond to the data collected through Eurofound’s Network of the European correspondents presented in Table 2.

Source: EU-LFS

Next to employment, trends in the number of companies in the sector can be a relevant indicator for observing the sector. Figure 3 shows considerable differences between countries. Whereas in Hungary, the number of companies increased by 55.8% between 2008 and 2013, the number of companies in Greece, Portugal and Slovenia dropped substantially (18.6, 21.0% and 18.0% respectively).

Figure 3: Difference in number of companies, 2008–2013 (%)



Source: Panteia, based on national contributions by Eurofound’s Network of European correspondents (2015).

Table 3 provides a more detailed overview of the number of companies and the developments in each Member State.

Table 3: Total companies in the extractive industries sector in 2013

	Number of companies		Difference 2008–2013		Source
	2008	2013	Number	%	
AT	347	353 ^a	6	1.7	Statistik Austria: Leistungs- und Strukturstatistik, and own calculations
BE	8,165 ^b	10,922 ^c	2757	33.8	
BG	378	377	-1	-0.3	
CY	58	60	2	3.4	Business Register, CYSTAT
CZ	577	644	67	11.6	Czech Statistical Office (ČSÚ)
DE	2,521	2,332	-189	-7.5	
DK	212	200	-12	-5.7	Statistikbanken.dk, GF1 + GF2
EE	99	138 ^d	39	39.4	Statistics Estonia on the basis of annual statistical questionnaire ‘EKOMAR’
EL	1,229	1,001	-228	-18.6	ELSTAT

	Number of companies		Difference 2008–2013		Source
	2008	2013	Number	%	
ES	2,958	2,549	-409	-13.8	
FI	968	888	-80	-8.3	Statistics Finland: structural business and financial statement statistics
FR	1,975	1,661 ^a	-314	-15.9	INSEE Esane
HR	281	291	10	3.6	Croatian Bureau of Statistics
HU	446	695 ^c	249	55.8	KSH data (mining, quarrying)
IE	NA		NA	NA	
IT	2,816	2,439 ^a	-377	-13.4	National Structural Business Statistics, Istat
LT	68	92	24	35.3	Eurostat, Annual detailed enterprise statistics for industry (NACE Rev. 2, B–E)
LU	11	10	-1	-9.1	Répertoire des entreprises du STATEC
LV	146	200	54	37.0	CSP: annual survey of enterprises and institutions
MT	93	108	15	16.1	National Statistics Office (NSO): business demographics: 2008–2013
NL	255	335	80	31.4	CBS Statline
PL	NA	4,248	NA	NA	National Official Business Register REGON, Central Statistical Office (GUS)
PT	4,392	3,432	-960	-21.9	Statistics Portugal (INE)
RO	1,083	1,072	-11	-1.0	INSSE
SE	676	738	62	9.2	Statistics Sweden: Statistical Business Register
SI	110	90	-20	-18.2	SRDAP
SK	164	202	38	23.2	ŠÚ SR: The Company Registry
UK	1,895	2,130	235	12.4	ONS

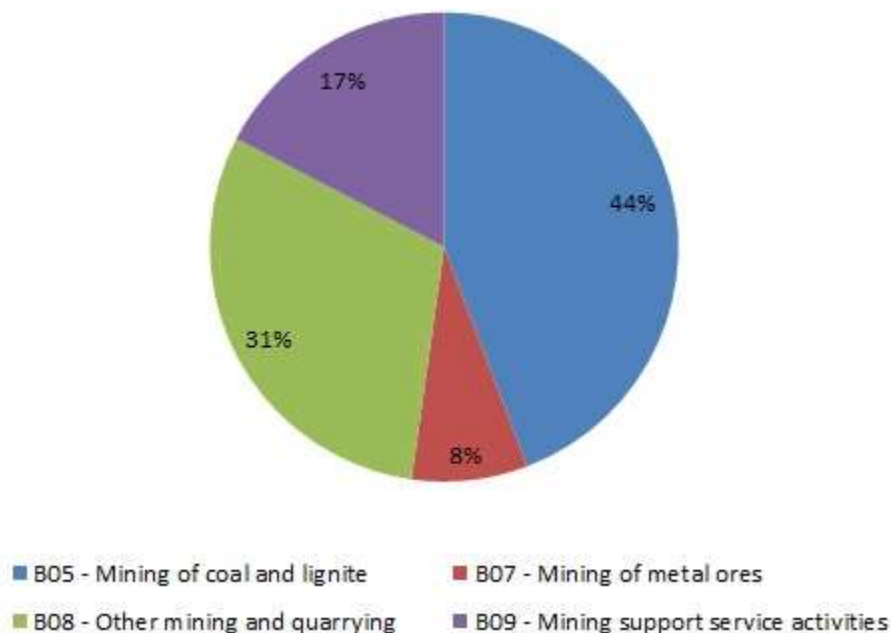
Notes: ^a Reference year 2012. ^b 169 companies + 7,996 self-employed. Through UEPG, its Belgian affiliate Fediex indicated that this number might not be correct. At the time of writing, UEPG had not provided an alternative number. ^c 148 + 10,774 self-employed. ^d Includes complete NACE Rev. 2 Section B (that is, including Division 06). ^e Mining and quarrying; no breakdown available by NACE divisions. NA = information not available
Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Company sizes

Depending on the different extractive industries subsectors, the size of companies is very different as is also the average number of workers by company. This is a key factor to be able to understand the representativeness of the different subsectoral associations. In the coal and lignite or in the metallic mining subsectors the size of the companies is big compared with the average size of the sector. In some quarrying subsectors, however, a small number of large multinational companies co-exist with a large number of small and medium-sized enterprises (SMEs) and micro enterprises. Micro enterprises are much more difficult to integrate in an association scheme than bigger companies. The conclusions of this representativeness study should take this into account.

Figures 4 and 5 provide a more detailed view of the different subsectors included in this study. Figure 4 shows the relative importance of EU28 employment for each division in 2013. Mining of coal and lignite is the largest sector (42%), followed by 'other mining and quarrying' (34%) and mining support service activities (16%). The smallest sector in terms of employment is mining of metal ores (8%).

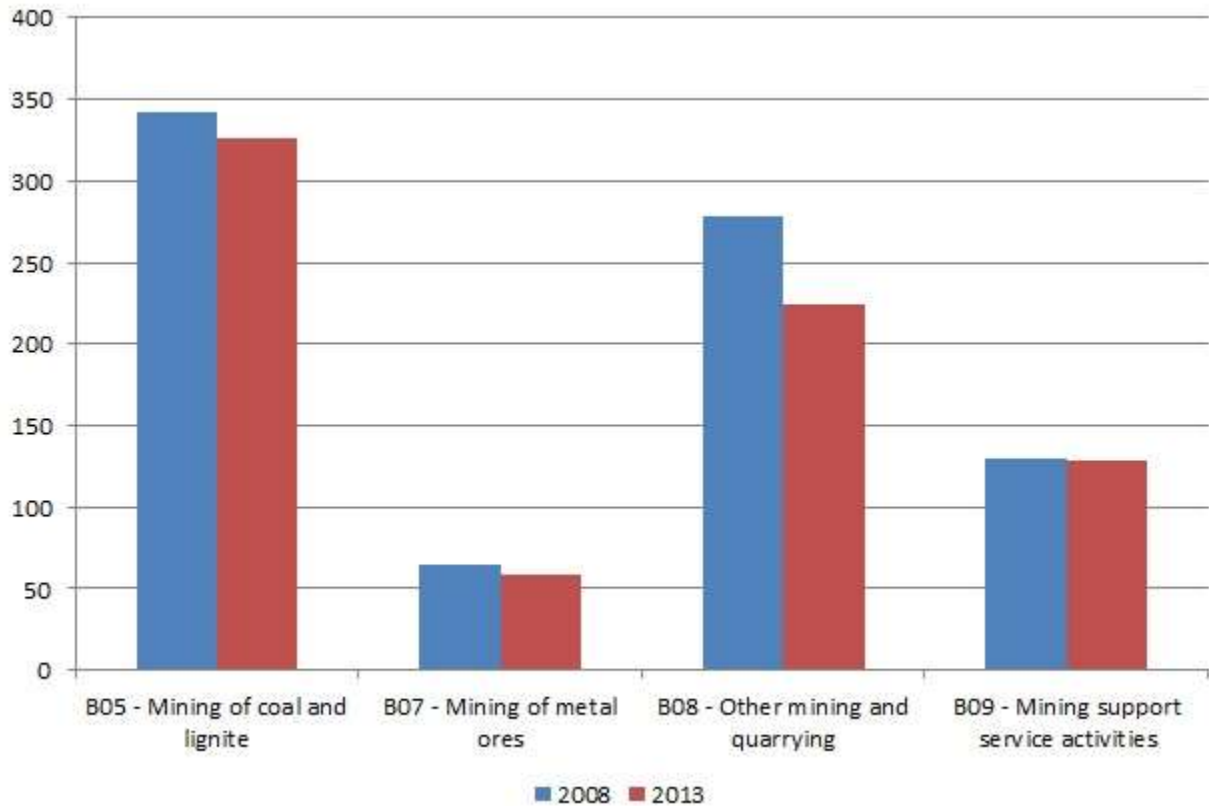
Figure 4: Relative employment by NACE category, EU28, 2013



Source: Panteia, based on EU-LFS.

Figure 5 presents the absolute figures for 2008 and 2013 and shows that the relative importance of each subsector did not change drastically in this period. All subsectors show a decline between 2008 and 2013. The mining support service activities subsector shows the smallest relative decrease (1.1%), while a slightly larger decrease is apparent for the mining of coal and lignite subsector (4.7%) and the mining of metal ores subsector (8.2%). The Other mining and quarrying subsector shows the largest relative decrease with 19.4%.

Figure 5: Employment absolute figures in 2008 and 2013, EU28 (in thousands)



Source: Panteia, based on EU-LFS data.

National level of interest representation

This chapter provides a national level analysis of interest representation. It focuses on:

- membership domain and the strength of organisations;
- their role in collective bargaining;
- their role in public policymaking.

Trade unions or employee interest representation

This study identified 98 sector-related trade unions. Estonia, Lithuania and Malta were the only countries where no sector-related trade union was identified. In all other countries, at least one trade union was identified that fulfils the criteria to be included in the representativeness study (sector-related and involved in collective bargaining and/or affiliated to IndustriALL Europe). Only one sector-related trade union organisation was found in Latvia and Slovakia. The highest degree of fragmentation, in terms of number of trade union organisation per country, was found in Finland and Poland.

Table 4: Degree of trade union fragmentation in the extractive industries sector

Number of trade unions	Country
0	EE, LT, MT
1	LV, SK
2	BG, CZ, DE, HR, LU, RO, UK
3	AT, CY, DK, HU, IE, SI
4	SE
5	BE, EL, PT
6	ES, FR, NL, IT
9	FI
12	PL

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Table 31 and Table 32 in Annex II (available on the [webpage for this study](#)) present data on the individual trade unions and their domains and membership strength.

Domain patterns of trade unions

The domain description of all trade unions is presented in Table 31 in Annex II.

Two of the 98 identified trade unions (2%) (ZZ PRZEROBKA and ZZG, both in Poland) demarcate their domain as **congruent** with the sectoral definition (Figure 6). This implies that statistical definitions of business activities in the sector differ from the lines along which trade unions identify interests of employees.

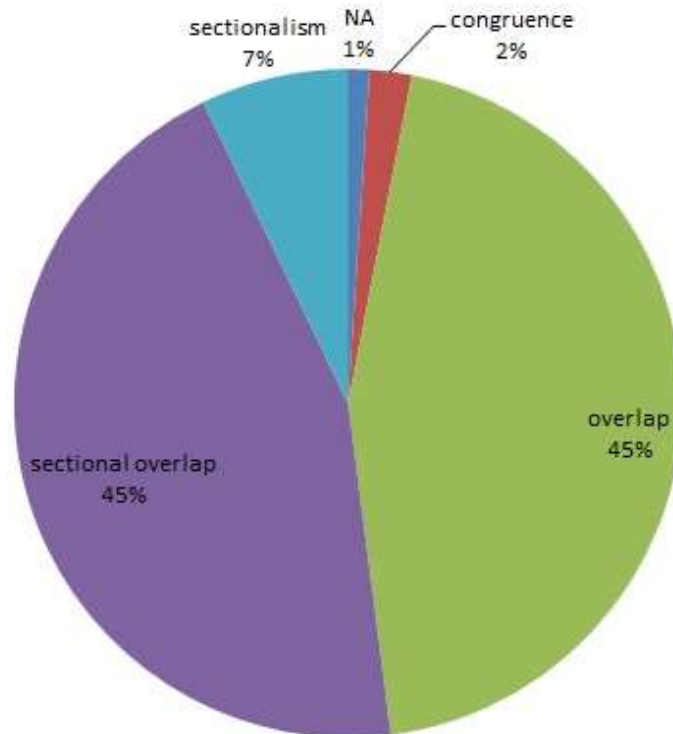
A total of 44 of the 98 trade unions (46%) have a domain pattern that shows **overlap** with the sector under scrutiny. In many cases, it concerns general unions that cover all sectors. It also includes unions that represent a certain category of employees (electricians, engineers, technical

workers) across sectors. Other sectors covered by the trade unions in this group include construction, industry, metals, woodworking, chemical and manufacturing.

A similar share of the trade unions (44% or 43 in absolute terms) shows **sectional overlap** with the sectoral definition. This generally results from the fact that one or more subsectors are not covered. In some cases it results from representation of only white-collar or blue-collar workers.

Sectionalism is recorded for 7 out of 98 trade unions (7%). In two cases, the union covers only underground mining. In other cases, specific NACE codes that are not covered are mentioned in Annex II (no general conclusion can be made).

Figure 6: Domain patterns of trade unions



Note: NA indicates it was not possible to determine the domain pattern for 1% of the trade unions (one case).

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Membership figures of trade unions and organisational strength within the sector

Membership of the sector-related trade unions is voluntary in the 28 EU Member States. All trade unions indicated membership was voluntary; only OOIMSEK in Cyprus) and FZZGWB in Poland did not answer this question.

The number of active members (both within and outside the sector) of trade unions varies between 250 (VOC in the Netherlands) and 1.4 million (Unite in the UK). This variation might be explained by the differences in membership domains and the size of the country's economy rather than a trade union's ability to recruit members. Therefore, this study uses sectoral density to assess the organisational strength within the sector. Please refer to Annex I for a description of the methodology and considerations on sectoral density.

Based on the available information in the national contributions compiled by Eurofound's Network of European correspondents, sectoral density could be calculated for 40 of the 98 trade unions. The results vary from a sectoral density of 0.4% to 61.1%. The data can be summarised as follows:

- 19 trade unions show a sectoral density rate of less than 10% (of which 8 have a rate of less than 3%);
- 6 trade unions show a sectoral density rate of 10%–20%;
- 10 trade unions show a sectoral density rate of 20%–40%;
- 5 trade unions show a sectoral density rate of more than 50%.

From these figures, it can be concluded that most trade unions have 'low' to 'very low' sectoral densities. No clear cross-country pattern is apparent when comparing the figures. All sectoral density rates are included in Table 32 in Annex II (available on the [webpage for this study](#)); note that, in some cases, the rates are based on rough estimates.

Employer organisations

This study identified a total of 114 sector-related employer organisations and companies, of which 85 identified as employer organisations and 29 as companies. Similar to the findings for trade unions, all countries except Estonia, Lithuania and Malta have at least one employer organisation that fulfils the criteria to be included in the representativeness study (sector-related and involved in collective bargaining and/or affiliated to Euromines, EURACOAL, IMA Europe, UEPG or APEP). Note that APEP requested the study to state that 'APEP is an employer's organisation without the capacity of collective bargaining'.

This study also takes into account companies that are members of the European social partners. The national correspondents have completed factsheets about these companies.

The data about employer organisations also include some single companies. Table 5 shows the number of companies in each Member State identified by this study (29 in total).

Table 5: Number of companies per country (included in this study)

Number of companies	Country
0	BE, CZ, DK, EE, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, RO, UK
1	AT, BG, CY, ES, SI, SK
2	FI, PL
3	EL
4	SE
6	DE, PT

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Table 6 shows the degree of fragmentation. In five countries (Hungary, Latvia, Luxembourg, the Netherlands, Romania), only one employer organisation was identified. Germany and Italy have the highest numbers of social partner actors involved on the employers' side. Germany has 9 employer organisations plus 6 companies, and Italy has 11 different employer organisations.

Table 6: Degree of employer organisation fragmentation in the extractive industries sector (including companies)

Number of employer organisations and companies	Country
0	EE, LT, MT
1	HU, LU, LV, NL, RO
2	BG, CY, CZ, HR, IE
3	DK
4	AT, EL, SI, SK, UK
5	FR
6	BE, PL
7	
8	ES, FI, PT
9	SE
>10	DE (15), IT (11)

Note: For some countries, individual companies are also included in the data for employer organisations. Table 7 indicates the number of employer organisations identified in each Member State.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Table 7 shows the fragmentation for the employer organisations excluding companies. Table 33 and Table 34 in Annex II present the data for each individual employer organisation.

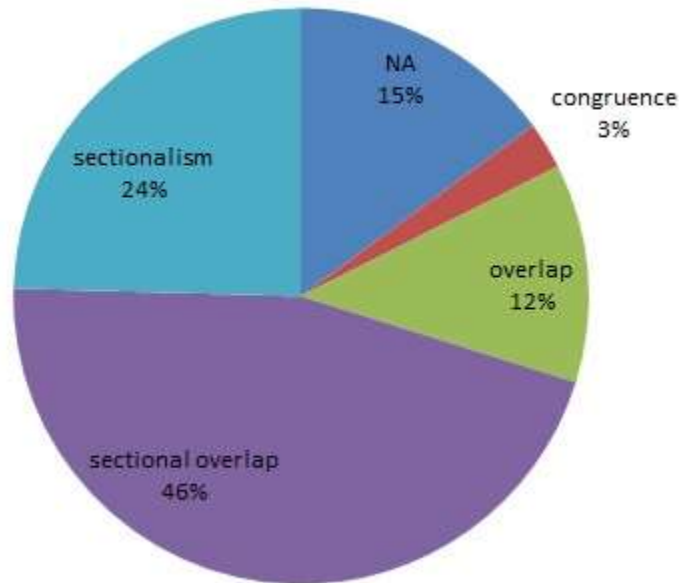
Table 7: Degree of employer organisation fragmentation in the extractive industries sector (excluding companies)

Number of employer organisations	Country
0	EE, LT, MT
1	BG, CY, EL, HU, LU, LV, NL, RO
2	CZ, HR, IE, PT
3	AT, DK, SI, SK
4	PL; UK
5	FR, SE
6	BE, FI
7	ES
9	DE
11	IT

Domain patterns of employer organisations

Figure 7 shows the domain patterns of the employer organisations included in this study.

Figure 7: Domain patterns of employer organisations



Note: NA indicates it was not possible to determine the domain pattern for 15% of the employer organisations (17 cases).

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Sectional overlap is the most widespread domain pattern, with 46% of the employer organisations (52 organisations). In many cases, organisations do cover only certain activities such as coal and lignite or limestone, covering only a part of the NACE code definition of the sector. At the same time, the overlap means that other activities outside of the NACE code definitions are covered here such as construction, other parts of the mining industry, the manufacture of minerals, and woodworking.

With 24%, **sectionalism** is the second most prevalent domain pattern (28 organisations). A similar pattern can be seen as with sectional overlap: often organisation cover only specific subsector, such as quarrying of stones and gravel for instance.

Overlap was reported by 12% of the organisations (14 organisations) to be their domain pattern. Other sectors covered by these organisations are construction, handicraft, trade, woodworking, metal industry and other mining activities. See Table 33 in Annex II for a full description of all domains.

Finally, only 3% (3 organisations) report **congruence** as a domain pattern: Danske Råstoffer in Denmark, Assimagra in Portugal and Promins in Croatia. This is a similar result as among the trade unions, where there were two unions with a congruent domain pattern.

The absolute figures and percentages are shown in Table 8, which also distinguishes between companies and employer organisations.

Table 8: Breakdown of domain patterns for employer organisations and individual companies

	Only employer organisations		Only companies		Total	
Congruence	3	(3%)	0		3	(3%)
Overlap	14	(16%)	0		14	(12%)
Sectionalism	22	(26%)	6	(21%)	28	(24%)
Sectionalism overlap	42	(49%)	10	(35%)	52	(46%)
NA	4	(5%)	13	(45%)	17	(17%)

Note: NA = not possible to determine domain pattern.

Source: Source: Panteia, based on national contributions from Eurofound's Network of European correspondents (2015).

Membership figures of employer organisations and organisational strength within the sector

Only in Austria do sector-related employer organisations **rely on obligatory membership**. Almost all employers in Austria are obliged to be **members of encompassing 'chambers' of commerce and industry**, which also act as employers' associations on behalf of their members in collective bargaining.

Two sectoral density rates (of companies and employees) are considered when assessing membership figures and organisational strength of employer organisations:

Sectoral density in terms of companies can be calculated for 54 out of the 114 employer organisations.

- 28 organisations claim a density of less than 2%;
- 12 organisations claim a density of 2%–10%;
- 10 organisations claim a density between 10% and 50%;
- 4 organisations claim density of 50% or higher.

Sectoral density in terms of employees can be calculated for 56 out of the 114 employer organisations:

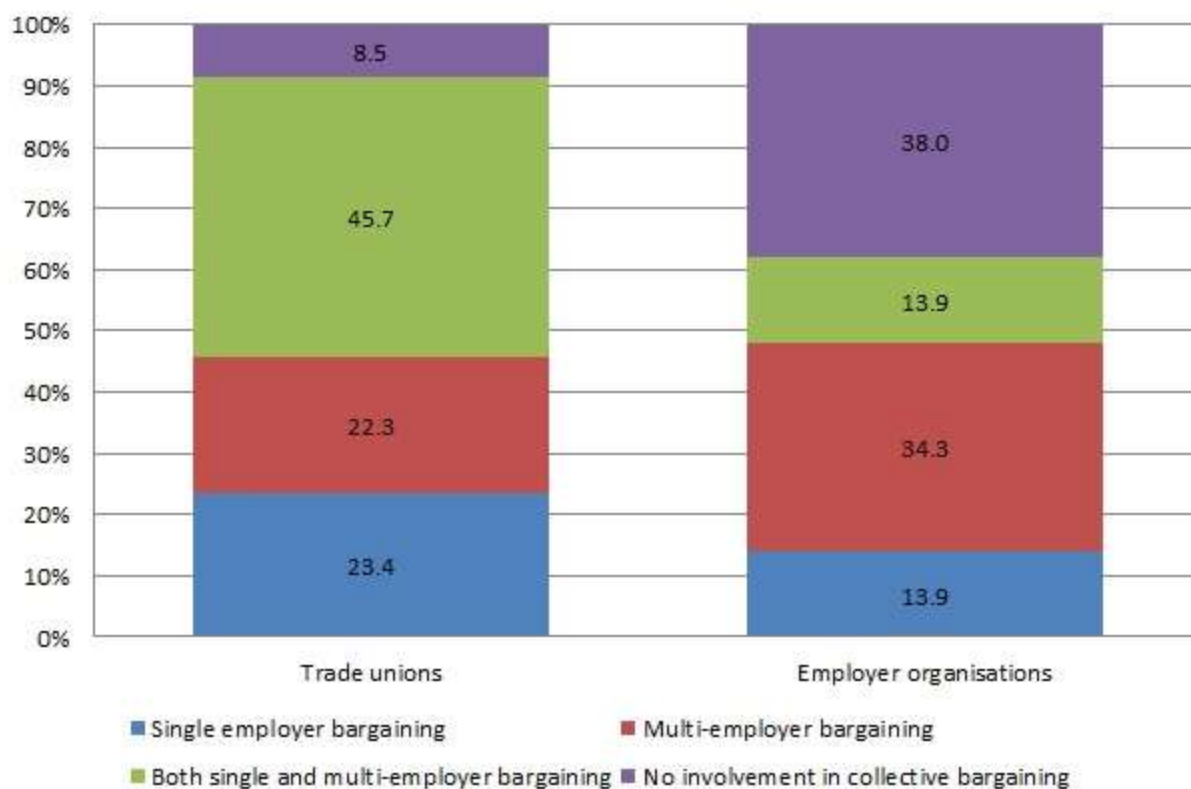
- 9 organisations claim a density of less than 2%;
- 13 organisations claim a density of 2%–10%;
- 21 organisations claim a density of 10%–50%;
- 13 organisations claim a density of more than 50%.

Generally speaking, the figures in this representativeness study show a higher employer organisation sectoral density rate in terms of employees than in terms of affiliated companies. In principle, this points at a higher density of affiliated companies among those companies with a larger workforce in the sector, and a lower affiliation among the companies with a smaller workforce in the sector.

Collective bargaining

Figure 8 shows the involvement of trade unions and employer organisations in collective bargaining.

Figure 8: Involvement of organisations in different forms of collective bargaining (% of total)



Note: No data for six employer organisations and three trade unions.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

A total of 89 out of the 98 **trade unions** are involved in sector-related collective bargaining. The majority of the trade unions (45.7%) are involved in both single and multi-employer collective bargaining. A similar share of the trade unions is involved in only multi-employer collective bargaining (22.3%), or in only single employer collective bargaining (23.4%) (Figure 8). Latvia is the only country where none of the identified trade unions is involved in sector-related collective bargaining.

A total of 67 out of the 114 **employer organisations** (and companies) are involved in sector-related collective bargaining; 38.0% of the employer organisations are not involved in collective bargaining. A similar proportion (34.3%) is involved in multi-employer collective bargaining, whereas only 13.9% is involved in both single and multi-employer bargaining. Another 13.9% is involved in single employer collective bargaining (Figure 8). In Latvia, Luxembourg, the Netherlands and Romania, no employer organisation is involved in collective bargaining. However, only one employer organisation was identified for each of these countries.

Distinguishing the employer organisations from the individual companies shows that 13 companies are involved in single employer collective bargaining and 11 are not involved in collective bargaining. Among the 85 employer organisations, 37 are involved in multi-employer

collective bargaining. Two employer organisations are involved in single employer collective bargaining only, while 15 are involved both single and multi-employer collective bargaining, and 30 employer organisations are not involved in collective bargaining (Table 9).

Table 9: Collective bargaining, absolute figures

	Trade unions	Employer organisations*
No collective bargaining involvement	9	41 (11)
Single employer collective bargaining only	22	15 (13)
Multi-employer collective bargaining only	21	37 (0)
Both single and multi-employer collective bargaining	43	15 (0)
No information on type of bargaining	3	6 (5)
Total	98	114 (29)

*Note: * Number of companies included is given in brackets.*

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Annex IV (available on the [webpage for this study](#)) gives the information available on collective bargaining within each country, as collected by Eurofound's Network of European correspondents. Based on this information, Table 10 provides an overview of the collective bargaining coverage and the type of collective bargaining (single employer, multi-employer, or both single and multi-employer).

The number of countries that have multi-employer collective bargaining as the prevailing level appears to be similar to the number of countries where single employer collective bargaining prevails. In none of the countries was single and multi-employer collective bargaining identified as equally important.

There was no information available of 10 of the 28 EU Member States. However, there is no collective bargaining in Estonia, Lithuania and Malta because there are no sector-related trade unions (Table 4) or employer organisations (Table 6).

The practice of extending collective agreements exists in Belgium, Bulgaria, Finland, France, Germany, Italy, Latvia, the Netherlands, Portugal, Slovenia, Spain and Sweden.

Table 10: Collective bargaining coverage and collective bargaining level

	Collective bargaining coverage				Information not available
	90% or more	50%–80%	25%–50%	1%–25%	
Single employer collective bargaining sole level or prevailing level		SK	LU, NL, UK	HR, PL	IE, LT, LV
Multi-employer collective bargaining sole level or prevailing level	AT, BE, FI, SE, SI	CY, DK	PT		ES
No collective bargaining					
Information not available	BG, DE, FR, IT	HU	CZ		EE, EL, MT, RO

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Participation in public policymaking

Interest associations may influence public policy in the following two ways.

- They may be consulted by the authorities on matters affecting their members.
- They may be represented on 'corporatist' (in other words tripartite) committees and policy consultation boards.

This study considers only cases of consultation and corporatist participation that relate explicitly to sector-specific matters. Consultation processes can be wide-ranging and, therefore, the organisations consulted by the authorities may vary according to issues and also depend on changes in government.

In 18 EU Member States, at least one trade union and one employer organisation reported being consulted on public policymaking. In five countries, only trade union(s) or employer organisation(s) reported that they were consulted. In the three countries (Estonia, Lithuania and Malta), where no sector-related trade unions or employer organisations were identified, there is obviously no participation by social partner organisations in public policymaking. There is also no participation in Ireland and Latvia.

Trade unions or interest representations

A total of 56 out of the 98 trade unions indicated that they are consulted, of which 16 said this was on a regular basis and 38 on an ad hoc basis. Two out of the 55 unions did not specify whether this was on an ad hoc or a regular basis.

A total of 22 trade unions reported they are not consulted, while there was no information available for a further 20 trade unions.

In Croatia, Cyprus, Ireland, Latvia and the UK, none of the trade unions said there were consulted (either a response of 'no' or 'no information available').

Employer organisations or business associations

A total of 61 out of the 114 employer organisations report that they are consulted; 12 organisations indicated that no consultation took place while there was no information available in 41 cases.

Of these 61, 23 reported that they were consulted regularly and 36 said they were consulted an ad hoc basis. Two out of the 61 organisations did not specify if consultation was on an ad hoc or regular basis.

In all countries where employer organisations are identified, these organisations were consulted apart from in Bulgaria, Greece, Ireland and Latvia.

Tripartite participation

Annex III (available on the [webpage for this study](#)) presents a full overview of the bodies identified by Eurofound's Network of European correspondents. It identifies tripartite and/or bipartite bodies in 17 countries (marked in bold in Table 11).

Table 11 and Figure 9 provide an overview of the information provided in Annex III. For each Member State, Table 11 shows whether trade unions and employer organisations are consulted and Figure 9 shows if tripartite or bipartite bodies are identified.

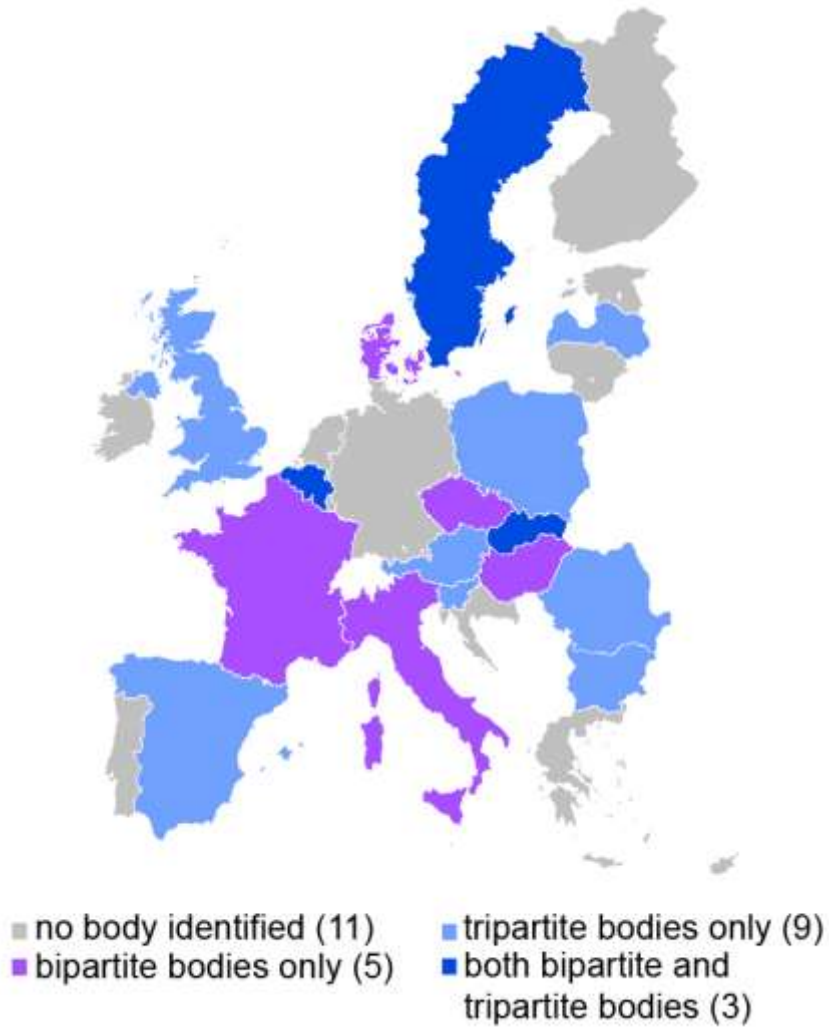
Table 11: Consultation of organisations bodies by country

	Trade unions consulted	No trade union consulted
Employer organisation consulted	AT, BE, CZ, DE, DK, ES, FI, FR, HU, IT, LU, NL, PL, PT, RO, SE, SI, SK	CY, HR, UK
No employer organisation consulted	BG, EL, IE	EE, LT, LV, MT

Notes: The countries marked in bold are those for which there is a tripartite or bipartite sector-specific board.

Source: National contributions by Eurofound's Network of European correspondents (2015).

Figure 9: Tripartite and bipartite sector-specific boards of public policy by country



Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

European level of interest representation

Six European level associations are part of the Sectoral Social Dialogue Committee:

Workers' side:

- IndustriALL Europe

Employers' side:

- European Association of Mining Industries (Euromines)
- European Association for Coal and Lignite (EURACOAL)
- European Industrial Minerals Association (IMA Europe)
- European Aggregates Association (UEPG)
- European Association of Potash Producers (APEP)

This chapter focuses on these organisations. It looks in detail at their membership domain and composition, before examining their capacity to negotiate and identifying other European organisations relevant to the sector.

All the organisations presented in the tables in this chapter cover the entire country; exceptions are indicated in notes.

Membership domain, composition and geographical coverage

This section presents the sector-related trade unions that are a member of the European level organisations, with a subsection for each of the European level associations that are part of the Sectoral Social Dialogue Committee.

IndustriALL Europe

Trade unions affiliated to the European Metalworkers' Federation (EMF), the European Mine, Chemical and Energy Workers' Federation (EMCEF) and the European Trade Union Federation for Textiles, Clothing and Leather (ETUF:TCL) joined forces on 16 May 2012 to create IndustriALL Europe. Through its affiliated trade union organisations, **IndustriALL Europe** represents 6.9 million workers across supply chains in manufacturing, mining and energy sectors across Europe.

Of the 98 trade unions identified in the extractive industries sector, 52 are affiliated to IndustriALL Europe.

IndustriALL Europe has at least one sectoral affiliation in 21 out of the 25 EU Member States where sector-related unions were identified. The exceptions are the Czech Republic, Cyprus, Latvia and Slovakia. IndustriALL Europe does have affiliates in these countries, but they are not identified as sector-related and are therefore not taken into account in this study (see Table 37 in Annex II).

The membership domain of ZZG in Poland is the only one congruent with the NACE code sector definition (Table 12).

Another 32 of the 50 IndustriALL Europe affiliates in the sector have a membership domain covering the entire NACE code defined sector, plus overlapping activities outside of the sector. Thus, in 15 EU Member States (Austria, Belgium, Croatia, Denmark, Finland, Germany, Ireland, Luxembourg, the Netherlands, Poland, Portugal, Romania, Spain, Sweden and the UK), IndustriALL Europe has at least one affiliate covering at least the entire extractive industries sector (Table 12).

The two IndustriALL Europe affiliates in Bulgaria cover only a section of the extractive industries sector (Table 12).

For 17 other affiliates, the domain covered is also a section of the sector, plus other activities outside of the sector.

All IndustriALL Europe's affiliates in five countries (France, Greece, Hungary, Italy and Slovenia) do not cover the entire sectoral domain (Table 12).

Table 12: Sector domain coverage and density figures of IndustriALL Europe members

	Trade union	Number of members in sector	Sectoral density (%)	Domain coverage*
AT	GPA-djp			O
	PRO-GE			SO
BE	CGSLB-ACLVB			O
	CNE-GNC			O
	CSC-ACV BIE			O
	FGTB-CG/ABVV-AC			O
	SETCA/BBTK			O
BG	СМФ 'Подкрепа'	6,200		S
	ФНСМ-КНСБ	8,751		S
DE	IG BCE			O
DK	CO-industri			O
	IDA			O
EL	GFWECI	200	2%	SO
ES	CCOO Construcción y Servicios ^a (FSC)			SO
	CCOO INDUSTRIA	2,101	8%	SO
	ELA-FTM ^b			O
	FITAG-UGT	10,000	39%	O
	USO FI	950	4%	O
FI	Insinööriliitto	200	4%	O
	Metalliliitto	1,844	35%	SO
	PRO-liitto	1,270	24%	SO
	Sähköliitto	80	1.5%	O
	TEAM-liitto	60	1%	SO
	TEK	200	4%	O
	YTN ^c	500	10%	O

	Trade union	Number of members in sector	Sectoral density (%)	Domain coverage*
FR ^d	FNEM-FO ^e	1,500		SO
HR	EKN			O
HU	BDSZ	2,269	60%	SO
	MOL Bányász	500	13%	SO
IE	SIPTU			O
	TEEU			O
	Unite			O
IT	Filctem Cgil			SO
	Femca Cisl			SO
	Uiltec Uil	4,000	23%	SO
LU	LCGB			O
	OGB-L	55	21%	O
NL	CNV	150	2%	O
	FNV	500	7%	SO
PL	PZZ 'Kadra'	13,500		O
	SGiE NSZZ 'Solidarnosc'	31,400		O
	ZZG (OPZZ ZZG miners)			C
PT	FIEQUIMETAL			SO
	SIMA			O
	SINDEQ			SO
RO	Federația Națională Mine Energie, FNME	1,400	2.2%	O
SE	IF Metall	5,800	59%	O
	Sveriges Ingenjörer	400	4%	O
	Unionen	750	8%	O
SI	KNG –ZSSS	25	1%	SO
UK	UNITE			O
	GMB			O

Notes: Table includes only members of IndustriALL Europe relevant to this sector. * C = congruence; O = overlap; S = sectionalism; SO = sectional overlap. ^a In terms of 'mutual recognition', according to UEPG, CCOO Construcción y Servicios organises and represents most of the workers in 'aggregates, and industrial minerals and ornamental stones'. ^b Covers only the Basque Country.

^c Member associations, Academic Engineers and Architects in Finland TEK and the Union of Professional Engineers in Finland, are members of IndustriALL Europe and UNI Europe.

^d IndustriALL Europe has four affiliates in France that include in their name a reference to the mining sector: FNME-CGT, CFTC-CMTE, FGMM-CFDT and FNEM-FO. With the closure of coal mines, the only members of these unions are pensioners. The only union that reported still having a reasonable number of active members in the extractive industries sector was FENM-FO, which reported 1,500 members, mostly in quarrying (also inactive, see next note). ^e According to FENM-FO, it has about 1,500 members including miners in a pre-retirement scheme, employees of the miners' social security regime, and employees of quarries and salt mines. The estimated number of active members is less than 50 (quarries and salt mines). The sectoral density is based on this figure of 50.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Of the 52 trade unions affiliated to IndustriALL Europe, 43 are involved in sector-related bargaining. There is at least one affiliated trade union taking part in collective bargaining in 20 EU Member States (Table 13).

Of the 52 affiliates, 33 reported being consulted by public authorities on sector-related policymaking. Among these 33, 10 are consulted regularly and 21 on an ad hoc basis; two did not indicate the frequency of consultation. In 16 EU Member states, IndustriALL Europe has at least one affiliate that is consulted on sector-related policies.

Seven of the IndustriALL Europe affiliates reported that they were not consulted, while there is no information available for 11 others. There are two countries (Croatia and Slovenia) where IndustriALL Europe has one affiliate but neither of them is consulted. For Ireland, Italy and the UK no information is available.

Table 13: Involvement in collective bargaining and sector-related policymaking of the sector-related members of IndustriALL Europe

	Trade union	Collective bargaining	Consulted*	Regular or ad hoc
AT	GPA-djp	Yes, multi-employer bargaining only	Yes	Ad hoc
	PRO-GE	Yes, multi-employer bargaining only	Yes	Regular
BE	CGSLB-ACLVB	Yes, both single and multi-employer bargaining	Yes	Ad hoc
	CNE-GNC	Yes, both single and multi-employer bargaining	Yes	Ad hoc
	CSC-ACV BIE	Yes, both single and multi-employer bargaining	Yes	Ad hoc
	FGTB-CG/ABVV-AC	Yes, both single and multi-employer bargaining	Yes	Ad hoc
	SETCA/BBTK	Yes, both single and multi-employer bargaining	Yes	Ad hoc
BG	CMФ 'Подкрепа'	Yes, both single and multi-employer bargaining	Yes	Ad hoc

	Trade union	Collective bargaining	Consulted*	Regular or ad hoc
	ΦΗСМ-КНСБ	Yes, both single and multi-employer bargaining	Yes	Ad hoc
DE	IG BCE	Yes, both single and multi-employer bargaining	Yes	N.A.
DK	CO-industri	Yes, multi-employer bargaining only	Yes	Ad hoc
	IDA	No	Yes	Ad hoc
EL	GFWECI	Yes, multi-employer bargaining only	Yes	Ad hoc
ES	CCOO Construcción y Servicios	Yes, both single and multi-employer bargaining	Yes	Ad hoc
	CCOO INDUSTRIA	Yes, both single and multi-employer bargaining	Yes	Regular
	ELA-FTM ^a	Yes, single employer bargaining only	N.A.	N.A.
	FITAG-UGT	Yes, both single and multi-employer bargaining	Yes	Ad hoc
	USO FI	Yes, single employer bargaining only	Yes	Ad hoc
FI	Insinööriliitto	No	Yes	Ad hoc
	Metalliliitto	Yes, multi-employer bargaining only	Yes	Ad hoc
	PRO-liitto	Yes, multi-employer bargaining only	Yes	Ad hoc
	Sähköliitto	No	N.A.	N.A.
	TEAM-liitto	No	No	NA
	TEK	No	No	NA
	YTN ^b	Yes, multi-employer bargaining only	No	NA
FR	FNEM-FO	No ^c	Yes	Regular
HR	EKN	Yes, single employer bargaining only	No	NA
HU	BDSZ	Yes, both single and multi-employer bargaining	Yes	Regular
	MOL Bányász	Yes, single employer bargaining only	Yes	Ad hoc

	Trade union	Collective bargaining	Consulted*	Regular or ad hoc
IE	SIPTU	Yes, single employer bargaining only	N.A.	N.A.
	TEEU	Yes, single employer bargaining only	N.A.	N.A.
	Unite	Yes, single employer bargaining only	N.A.	N.A.
IT	Filctem Cgil	Yes, both single and multi-employer bargaining	N.A.	N.A.
	Femca Cisl	Yes, both single and multi-employer bargaining	N.A.	N.A.
	Uiltec Uil	Yes, both single and multi-employer bargaining	No	NA
LU	LCGB	Yes, single employer bargaining only	N.A.	N.A.
	OGB-L	Yes, single employer bargaining only	Yes	Ad hoc
NL	CNV	Yes, both single and multi-employer bargaining	Yes	Regular
	FNV	Yes, both single and multi-employer bargaining	N.A.	N.A.
PL	PZZ 'Kadra'	Yes, both single and multi-employer bargaining	Yes	Regular
	SGiE NSZZ 'Solidarnosc'	Yes, both single and multi-employer bargaining	Yes	Regular
	ZZG	Yes, single employer bargaining only	N.A.	N.A.
PT	FIEQUIMETAL	No	No	NA
	SIMA	No	Yes	Regular
	SINDEQ	Yes, multi-employer bargaining only	Yes	N.A.
RO	Federația Națională Mine Energie, FNME	Yes, both single and multi-employer bargaining	Yes	Ad hoc
SE	IF Metall	Yes, multi-employer bargaining only	Yes	Ad hoc
	Sveriges Ingenjörer	Yes, multi-employer bargaining only	Yes	Regular
	Unionen	Yes, multi-employer bargaining only	Yes	Regular

	Trade union	Collective bargaining	Consulted*	Regular or ad hoc
SI	KNG–ZSSS	Yes, multi-employer bargaining only	No	NA
UK	UNITE	No	N.A.	N.A.
	GMB	Yes, single employer bargaining only	N.A.	N.A.

Notes: Table includes only members of IndustriALL Europe relevant to this sector. * Consulted by the country's government on sector-related policymaking. ^a Covers only the Basque Country. ^b Member associations, Academic Engineers and Architects in Finland TEK and Union of Professional Engineers in Finland, are members of IndustriALL Europe and UNI Europe. ^c Although FNEM-FO is involved in both single- and multi-employer bargaining, it no longer does so for active members at the sectoral level.

N.A. = information not available; NA = not applicable.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Euromines

Euromines is the representative of the European metals and minerals mining industry. It represents large and small companies and subsidiaries in Europe and in other parts of the world. Through the activities and operations of its members, more than 42 different metals and minerals are produced.

A total of 23 out of the 114 employer organisations and companies in the extractive industries sector are affiliated to Euromines. Among them are 18 employer organisations and 5 companies (indicated in Table 14).

Four affiliates of Euromines – ANIET, MBSZ, Patromin and SBK – are also affiliated to other sector-related European associations. Aniet is also affiliated to UEPG, Patromin is also affiliated to EURACOAL, SBK is also affiliated to both EURACOAL and UEPG, and MBSZ is also affiliated to UEPG.

Euromines has sectoral affiliations in 15 out of the 25 EU Member States where employer organisations were identified. The missing Member States are Belgium, Croatia, Cyprus, Denmark, France, Italy, Luxembourg, Latvia, the Netherlands and Slovenia (Table 14).

Euromines has affiliates that cover the entire sector as defined by NACE Divisions 05, 07, 08 and 09 in five EU Member States (Germany, Hungary, Ireland, Poland and Slovakia).

Only in Portugal does Euromines has an affiliate (Assimagra) whose coverage is congruent with the sector definition.

In 10 of the 15 Member States where Euromines has affiliates, they cover only a section of the entire sectoral NACE code definition, eventually with additional coverage outside of this sector.

High sectoral domain density figures in terms of employees were reported for Euromines affiliates in Bulgaria (95%), Finland (95%) and Sweden (87%, 82%) (Table 14). Euromines has an affiliate covering almost 50% of the employees in the sector in both the Czech Republic and Slovakia. In Romania, there is one with 41% coverage, one in Austria with 36% coverage and one in Portugal with 29% coverage of employees.

In terms of companies, Euromines affiliates are organising 17% of the companies in Slovakia and 15% of the companies in Bulgaria. Except for Sweden, where this is thought to be around 10%, it can be presumed to be below 10% in the other 12 EU Member States.

Table 14: Sector domain coverage and density figures of Euromines members

	Employer organisation*	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage**
AT	FBS	19	5%	2,095	36%	SO – also steel industry
BG	БМГК	58	15%	23,000	95%	SO – not in NACE Rev. 2 08.92 Also in logistics sector
CZ	Těžební unie (TU)	35	5%	19,000	49%	SO – not in NACE Rev. 2 07, 08.92, 08.93, 09.1 Also in design, testing and schools
DE	VKS	10	0.4%	11,800	16%	S – only potash and rock salt mining
	VRB					O
EL	ELMIN	1				S – not in NACE Rev. 2 05, 08, 09
	GMEA	28	3%	15,000		S – not in NACE Rev. 2 07.10, 07.21, 08.12, 08.91, 08.92, 08.93
ES	CONFEDEM					SO – only extraction of mining of metal ores Also in metal sector
FI	Agnico Eagle Finland Oy	1				S – only NACE Rev. 2 09.90 support activities
	FinnMin/ Kaivosteollisuus	37	4%	5,000	95%	SO – not in mining of coal and lignite Also in machinery industry
HU	MBSZ					O – also in gas storage
IE	IMEG (part of Ibec)					O – Ibec covers all sectors
PL	KGHM Polish Copper Co. ^a	1		17,000		S – only NACE Rev. 2 07.29
	ZPPM	9	0.2%	17,000		O – also in other sectors
PT	ANIET	149	4%	3,326	29%	SO – no mining of coal and lignite in Portugal Also in other sectors
	ASSIMAGRA	9	0.3%			C

	Employer organisation*	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage**
RO	Patromin (Asociația Patronală Minieră Din România) ^b	13	1.2%	25,900	41%	O – also covers companies in the energy mining sector
SE	Boliden AB				26%	SO – in mining of metal ores and support activities
	GAF ^c	31	4%	8,000	82%	SO – in mining of metal ore, limestone and support Also in smelting industry
	Lundin Mining AB				3.3%	S – only in mining of metal ores
	SveMin	36	5%	8,500	87%	SO – mining metal ore, limestone services Also in smelting industry and smelter production
SK	SBK	34	17%	5,000	49%	O – also in building materials and projective activities
UK	MAUK	15	0.7%	2,000	2%	S – only in NACE Rev. 2 07 and 08 Members are non energy industrial mineral underground mining companies.

*Notes: Table includes only members of Euromines relevant to this sector. * Companies are shown in bold. Employer organisations shown with grey shading are also affiliates of other sector-related European associations. ** C = congruence; O = overlap; S = sectionalism; SO = sectional overlap. ^a As a member of ZPPM. ^b Patromin covers only the south-west region, which is known for its coal and natural minerals resources. ^c GAF reports that it takes part in the social dialogue in Euromines through SveMin, of which it is a member and closely affiliated with.*

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

A total of 12 of the employer organisations affiliated to Euromines are involved in sector-related collective bargaining. In 10 EU Member States (Austria, Bulgaria, Finland, Germany, Greece, Hungary, Ireland, Poland, Portugal and Sweden), Euromines has at least one affiliate involved in collective bargaining (Table 15).

Among the 23 affiliates of Euromines, 11 are consulted by public authorities on sector-related policymaking. For six of them this happens on a regular basis, while for the other five it is on an ad hoc basis. All together there is at least one Euromines affiliate consulted in eight different EU Member States (Czech Republic, Finland, Germany, Hungary, Poland, Slovakia, Sweden and the UK). Three of Euromines affiliates reported that they are not consulted, while for nine others there is no information available.

Table 15: Involvement in collective bargaining and sector-related policymaking by sector-related members of Euromines

	Employer organisation*	Sector collective bargaining	Consulted**	Ad hoc or regular
AT	FBS	Yes, multi-employer bargaining only	N.A.	N.A.
BG	БМГК	Yes, multi-employer bargaining only	No	N.A.
CZ	Těžební unie (TU)	No	Yes	Ad hoc
DE	VKS	Yes, both single and multi-employer bargaining	Yes	Ad hoc
	VRB	No	N.A.	N.A.
EL	ELMIN	NA	N.A.	N.A.
	GMEA	Yes, multi-employer bargaining only	No	N.A.
ES	CONFEDEM ^a	NA	N.A.	N.A.
FI	Agnico Eagle Finland Oy	Yes, single employer bargaining only	N.A.	N.A.
	FinnMin/Kaivosteollisuus	Yes, multi-employer bargaining only	Yes	Regular
HU	MBSZ	Yes, both single and multi-employer bargaining	Yes	Regular
IE	IMEG (part of Ibec)	Yes, single employer bargaining only	N.A.	N.A.
PL	KGHM Polish Copper Co. ^b	Yes, single employer bargaining only	N.A.	N.A.
	ZPPM	No	Yes	Ad hoc
PT	ANIET	Yes, multi-employer bargaining only	N.A.	N.A.
	ASSIMAGRA	Yes, multi-employer bargaining only	N.A.	N.A.

	Employer organisation*	Sector collective bargaining	Consulted**	Ad hoc or regular
RO	Patromin (Asociația Patronală Minieră Din România) ^c	No	Yes	Regular
SE	Boliden AB	No	Yes	Regular
	GAF ^d	Yes, multi-employer bargaining only	Yes	Ad hoc
	Lundin Mining AB	No	No	N.A.
	SveMin	No	Yes	Regular
	SBK	No	Yes	Ad hoc
UK	MAUK	No	Yes	Regular

Notes: * Companies are shown in bold. ** Consulted by the country's government on sector-related policymaking. ^a No information was provided by CONFEDEM to Eurofound's national correspondent. UEPG reported that this information is wrong, but did not provide the relevant information. ^b As a member of ZPPM. ^c Patromin covers only the south-west region, which is known for its coal and natural minerals resources. ^d GAF reports that it takes part in the social dialogue in Euromines through SveMin, of which it is a member and closely affiliated with. N.A. = information not available.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

EURACOAL

EURACOAL is the umbrella organisation of the European coal industry. EURACOAL evolved in 2002 from the European Solid Fuels' Association (CECSO) following the expiry of the establishing the European Coal and Steel Community (ECSC).

EURACOAL has 35 members from 20 countries. Members include national producers' and importers' associations, companies and research institutes from Belgium, Bosnia-Herzegovina, Bulgaria, the Czech Republic, Finland, France, Germany, Greece, Hungary, Italy, Poland, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Turkey, the Ukraine and the UK.

In Poland, EURACOAL has always had as members the Employer's Confederation of the Polish Lignite Industry (PPWB) and Lubelski Wegiel Bogdanka S.A. (a hard coal mining company). Until May 2015, the Polish Hard Coal Mining Employers Association (ZPGWK) was also a member of EURACOAL. Following the liquidation of ZPGWK, EURACOAL temporarily had no member representing the rest of the hard coal sector in Poland. However, the President of the association (a nomination from ZPGWK) and the chairman of the Board of Katowicki Holding Węglowy S.A., represented the hard coal sector in Poland and kept EURACOAL informed of issues associated with the restructuring processes in the sector. Since January 2016, the Mining Chamber of Industry and Commerce (GIPH) has been a member of EURACOAL and represented the hard coal sector in Poland.

Table 16 lists the nine sector-related employer organisations and the three companies (indicated in bold) making up the 12 EURACOAL affiliates in 10 EU Member States. Two of the employer organisations, Patromin and SBK, are also affiliated to other sector-related European employer associations.

EURACOAL has sectoral affiliations in 10 EU Member States (Table 16). The missing Member States are Austria, Belgium, Croatia, Cyprus, Denmark, Finland, France, Hungary, Ireland, Italy, Luxembourg, Latvia, the Netherlands, Portugal and Sweden.

Sectoral coverage for almost all of EURACOAL affiliates is sectional overlap or sectional, as they are mostly only active in the mining of hard coal and lignite. The overlapping activities outside of the relevant sector here appear in electricity, logistics, building materials or education activities. One affiliate, SBK in Slovakia, covers the entire extractive industries sector plus overlapping activities.

SBK has 17% of the companies in the sector among its affiliates; for ZSDNP in the Czech Republic this is 2% and for the other EURACOAL affiliates it is less than 1%. However, the sectoral density of the employer organisations and companies affiliated to EURACOAL is much higher when the workforce they represent is considered. Its Czech affiliate, ZSDNP, has 10 member companies that employ 68% of the workers in the extractive industries sector in that country. The EURACOAL affiliates in Greece, Slovenia and Slovakia cover about half of the workforce in each of these three countries. The Bulgarian affiliate, and the three German affiliates together, cover about a third of the sectoral workforce. For the UK affiliate, the workforce coverage is only 2%. No information is available for the Polish and Spanish affiliates, while the geographical coverage of the Romanian affiliate, Patromin, is limited to the south-west region of the country.

Table 16: Sector domain coverage and density figures of the members of EURACOAL

	Employer organisation*	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage**
BG	Mini Maritsa Iztok EAD	1		6,465	27%	SO – many NACE Rev. 2 codes not covered
CZ	ZSDNP ^a	10	2%	26,500	68%	SO – not in NACE Rev. 2 05.20, 07.29, 08.11, 08.91, 08.92, 08.93 Also construction, machinery and education
DE	DEBRIV	5	0.2%	14,300	19%	SO – only lignite mining Also supplier activities
	GVSt	7	0.3%	10,000	13%	SO – only hard coal Also electricity production
	VDKi					SO – only imports hard coal Also rail and logistics, trade

	Employer organisation*	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage**
EL	PPC S.A ^b	1		4,765	51%	SO – not in NACE Rev. 2 07, 08, 09
ES	CARBOUNIÓ N	13	0.5%			S –only mining coal and lignite
PL	PPWB			11,540		SO – only NACE Rev. 2 05.2 and 09.9
RO	Asociația Patronală Minieră Din România – Patromin ^c	13		25,900		SO – only in south-west region (geographical), which is known for its coal and natural mineral resources Also in energy mining
SI	Premogovnik Velenje			1,340	51%	SO – only mines coal and lignite Also electrical design
SK	SBK ^d	34	17%	5,000	49%	O – also in building materials and projective act
UK	CoalPro	8	0.4%	2,000	2%	S – only mining hard coal

*Notes: Table includes only members of EURACOAL relevant to this sector. After the data collection for this study had been completed and thus not taken into account, GIPH became a member of EURACOAL in January 2016. It represents the hard coal sector in Poland and stands for approximately 100,000 employees. * Companies are shown in bold. Employer organisations shown with grey shading are also affiliates of other sector-related European associations. ** C = congruence; O = overlap; S = sectionalism; SO = sectional overlap.^a Except the Pardubice and Hradec Králové regions. ^b PPC's main mining activities take place in Western Macedonia (Ptolemais, Amydeo and Florina) and Megalopolis. ^c Patromin covers only the south-west region, which is known for its coal and natural minerals resources. ^d Via its members HBP and SZVK, SBK has representatives in EURACOAL.*

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Eight of EURACOAL's 12 affiliated employer organisations are involved in sector-related bargaining (Table 17). EURACOAL has at least one affiliate involved in collective bargaining in seven EU Member States (Czech Republic, Germany, Poland, Romania, Slovakia, Spain and the UK).

Of the 12 EURACOAL affiliates, 8 are consulted on sector-related policymaking, 4 on a regular basis and 4 on an ad hoc basis. One EURACOAL affiliate reports not to be consulted and there is no information available for three others. EURACOAL has at least one affiliate that is consulted in seven different Member States (Czech Republic, Germany, Poland, Romania, Slovakia, Spain and the UK).

Table 17: Involvement in collective bargaining and in sector-related policymaking of the sector-related members of EURACOAL

	Employer organisation*	Sector collective bargaining	Consulted**	Ad hoc or regular
BG	Mini Maritsa Iztok EAD	Yes, single employer bargaining only	N.A.	N.A.
CZ	ZSDNP ^a	Yes, multi-employer bargaining only	Yes	Regular
DE	DEBRIV	Yes, both single and multi-employer bargaining	Yes	Regular
	GVSt	Yes, both single and multi-employer bargaining	Yes	Ad hoc
	VDKi	No	N.A.	N.A.
ES	CARBOUNIÓN	No	Yes	Ad hoc
EL	PPC S.A ^b	Yes, single employer bargaining only	No	N.A.
PL	PPWB	Yes, multi-employer bargaining only	Yes	Ad hoc
RO	Patromin (Asociația Patronală Minieră Din România) ^c	No	Yes	Regular
SI	Premogovnik Velenje	Yes, single employer bargaining only	N.A.	N.A.
SK	SBK ^d	No	Yes	Ad hoc
UK	CoalPro	Yes, multi-employer bargaining only	Yes	Regular

Notes: * Companies are shown in bold. ** Consulted by the country's government on sector-related policymaking. ^a Except the Pardubice and Hradec Králové regions. ^b PPC's main mining activities take place in Western Macedonia (Ptolemais, Amydeo and Florina) and Megalopolis. ^c Patromin covers only the south-west region, which is known for its coal and natural minerals resources. ^d Via its members HBP and SZVK, SBK has representatives also in EURACOAL. N.A. = information not available.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

IMA Europe

IMA Europe is an umbrella organisation that brings together a number of European associations specific to individual minerals: ground calcium carbonate (GCC), precipitated calcium carbonate (PCC), dolomite, andalusite, bentonite, borates, diatomite, feldspar, kaolin, lime, mica, plastic clays, sepiolite, silica, talc and vermiculite. Together, IMA Europe's members represent over 500 companies in 28 countries.

Table 18 lists the 30 affiliates of IMA Europe: 14 employer organisations and 16 companies (indicated in bold). Of the 14 affiliated employer organisations, FSKI from Austria and Fedix from Belgium are also affiliated to UEPG. FSKI and seven of the other employer organisations

affiliated to IMA Europe are also affiliated to other sector-related European employer associations that not part of European sectoral social dialogue.

IMA Europe has sectoral affiliations in 14 countries (Table 18). The missing Member States are Bulgaria, Croatia, the Czech Republic, Denmark, Hungary, Ireland, Luxembourg, Latvia, the Netherlands, Romania and Slovenia.

All IMA Europe affiliates cover only a section of the defined extractive industries sector. For almost half of them, there are also overlapping activities covered outside the relevant sector here. The section covered by the IMA affiliates can be considered relatively low, looking at the percentage of the covered companies and their workforce. The German affiliate, BKRI, with 2% of the sector-related companies, covers 27% of the sectoral workforce and the German company, Clariant, covers 6%, together representing a third of the sectoral workforce. Fediex in Belgium covers 91% of the sectoral workforce and is also affiliated to UEPG. Among the IMA Europe affiliates that are organised only by IMA Europe, between 5% and 10% of the sectoral workforce is represented in Finland, France and Italy.

Table 18: Sector domain coverage and density figures of the members of IMA Europe

	Employer organisation*	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage**
AT	Concept Pet	1				SO – produces clumping cat litter on basis of bentonite
	FSKI	180	51%			SO
BE	Fediex	50	0.5%	2840	91%	S
	Groupement des sablières/ Bedrijfsgroupering Zandgroeven					S – only sandstone activities
CY	PELETICO	1		31		S
DE	AGQ					SO
	BKRI	40	2%	20,000	27%	S
	BV Kalk	100	4.3%	4,000	5.3%	S
	Clariant	1		4,800	6%	SO
	Dammann	1		150	0.2%	SO
	Elementis	1				SO
	Gimborn	1		138	0.2%	SO
	Häffner	1				SO
EL	S. & B Industrial Minerals S.A.	1				S
ES	ANCADE					SO

	Employer organisation*	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage**
FI	Nordkalk	1		409	8%	S
FR	MIF	14	0.8%	1,800	7%	SO
	UP'Chaux	17	1.0%	850	3.2%	S
IT	Assomineraria	35	1.4%	850	5%	SO
PL	SPW	5	0.1%			SO
PT	Adelino Duarte da Mota, S.A.	1				
	CALCIDRATA	1				
	LHOIST IBERICA LUSICAL	1				
	Sibelco Portuguesa	1		43	0.4%	S
SE	Brogårdssand	1		17	0.2%	S
	Sibelco Nordic	1		78	0.8%	S
	Svenska Kalkföreningen	3				SO
SK	Carmeuse Slovakia	1		230	2.4%	S
UK	British Calcium Carbonate Federation (BCCF)	8	0.4%	500	0.5%	S
	British Lime Association	3	0.1%	300	0.3%	S

*Notes: Table includes only members of IMA Europe relevant to this sector. * Companies are shown in bold. Employer organisations shown with grey shading are also affiliates of other sector-related European associations. ** C = congruence; O = overlap; S = sectionalism; SO = sectional overlap.*

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Of these 30 IMA Europe affiliates, 11 are involved in sector-related bargaining. In eight EU Member States (Austria, Belgium, Cyprus, France, Germany, Italy, Slovakia and Spain), IMA Europe has at least one affiliate involved in collective bargaining.

Furthermore, 14 of the 30 affiliates are consulted on sector-related policymaking. For six of them this happens on a regular basis, while for eight others it is on an ad hoc basis. In 10 different EU Member States (Austria, Belgium, France, Germany, Italy, Poland, Portugal, Spain, Sweden and

the UK), there is an affiliate being involved in sector-related policymaking. Three IMA Europe affiliates are not consulted and for another 13 there is no information available.

Table 19: Involvement in collective bargaining and in sector-related policymaking of the sector-related members of IMA Europe

	Employer organisation*	Sector collective bargaining	Consulted**	Ad hoc or regular
AT	Concept Pet	No	N.A.	N.A.
	FSKI	Yes, multi-employer bargaining only	Yes	Regular
BE	Fediex	Yes, multi-employer bargaining only	Yes	Ad hoc
	Groupement des sablières/ Bedrijfsgroepering Zandgroeven	Yes, multi-employer bargaining only	Yes	Ad hoc
CY	PELETICO	Yes, single employer bargaining only	N.A.	N.A.
DE	AGQ	No	No	N.A.
	BKRI	No	Yes	Ad hoc
	BV Kalk	Yes, multi-employer bargaining only	Yes	Regular
	Clariant	NA	N.A.	N.A.
	Dammann	NA	N.A.	N.A.
	Elementis	Yes, single employer bargaining only	N.A.	N.A.
	Gimborn	NA	N.A.	N.A.
	Häffner	NA	N.A.	N.A.
ES	ANCADE	Yes, multi-employer bargaining only	Yes	Ad hoc
FI	Nordkalk	No	N.A.	N.A.
FR	MIF	Yes, multi-employer bargaining only	Yes	Regular
	UP'Chaux	Yes, multi-employer bargaining only	No	NA
EL	S. & B Industrial Minerals S.A.	No	N.A.	N.A.
IT	Assomineraria	Yes, both single and multi-employer bargaining	Yes	Regular
PL	SPW	No	Yes	Ad hoc
PT	Adelino Duarte da Mota, S.A.	No	N.A.	N.A.
	CALCIDRATA	No	Yes	Regular
	LHOIST IBERICA LUSICAL	No	Yes	Ad hoc
	Sibelco Portuguesa	No	N.A.	N.A.
SE	Brogårdssand	No	No	N.A.
	Sibelco Nordic	No	N.A.	N.A.

	Employer organisation*	Sector collective bargaining	Consulted**	Ad hoc or regular
	Svenska Kalkföreningen	No	Yes	Regular
SK	Carmeuse Slovakia	Yes, single employer bargaining only	N.A.	N.A.
UK	British Calcium Carbonate Federation; BCCF	No	Yes	Ad hoc
	British Lime Association	No	Yes	Ad hoc

Notes: * Companies are shown in bold. ** Consulted by the country's government on sector-related policymaking. N.A. = information not available.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

UEPG

UEPG stands for Union Européenne des Producteurs de Granulats (European Aggregates Association in English and Europäischer Gesteinsverband in German). Aggregates covered by UEPG are sand, gravel (including marine aggregates), crushed rock, recycled and manufactured aggregates. UEPG represents the European aggregates industry in Brussels and has members in 29 countries.

In this study only the sector-related employer organisations affiliated to UEPG were included, not the direct affiliated individual companies, as they were reported not to be active in the nace code definition of the extractive industries.. Six of the 19 affiliates listed in Table 20 have double affiliations:

- FSKI from Austria and Fedieux from Belgium are also affiliated to IMA Europe.
- Aniet from Portugal and SBK from Slovakia are also affiliated to Euromines.
- MBSZ from Hungary is also affiliated to Euromines.

UEPG has affiliations in 17 countries. The missing Member States are Bulgaria, the Czech Republic, Greece, Italy, Luxembourg, Romania, Slovenia and the UK.

The sector covered by the Danish and Hungarian affiliates of UEPG is exactly congruent to the extractive industries sector as defined by NACE Divisions 05, 07, 08 and 09. BRA in Latvia, MBSZ in Hungary and SBK in Slovakia also cover the entire sector, as well as activities outside the sector. Most of the UEPG affiliates cover only a section of the extractive industries sector; a few combine this section with overlapping activities outside the sector (Table 20).

UEPG affiliates cover more than 10% of the companies in the sector in Austria, Cyprus, Denmark, France, Hungary, Sweden and Slovakia; the Austrian affiliate is also member of IMA Europe. In terms of workforce in the extractive industries sector, Germany can be added to this list, as BV MIRO covers 20% of the German workforce in the extractive industries sector.

As indicated elsewhere, the figures in this representativeness study show a higher employer organisation sectoral density rate in terms employees than in terms of affiliated companies. In principle, this points at a higher density of affiliated companies among the companies with a larger workforce, and a lower affiliation among the companies with a smaller workforce in the sector. According to the information collected in Table 20, this also appears to be true for UEPG. At the request of UEPG, it is added here the clarification that the aggregates sector is not very labour-intensive, as this subsector is comprised of many SMEs and micro enterprises.

Table 20: Sector domain coverage and density figures of the members of UEPG

	Employer organisation	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage*
AT	FSKI ^a	180	51%			SO
BE	Fediex ^b	50	0.5%	2,840	91%	S
CY	CAPA	22	37%	300		S
DE	BV MIRO	13 ^c	0.6%	15,000	20%	S
DK	Danske Råstoffer	42	21%	800	37%	C
ES	COMINROC (indirectly affiliated) ^d	1500	59%	13,552	53%	S
	FdA ^e	750	60% ^f	7,785	80%	S
FI	Infra					SO
FR	UNPG	900	54%			S
HR	PROMINS	42	14%	1,600	38%	C
HU	MBSZ					O
IE	ICF	100				SO
LV	BRA	2	1%			O
NL	Cascade	10	3%	200	3%	S
PL	PZPK	26	0.6%	7,500		SO
PT	ANIET	149	4%	3,326	29%	SO
SE	SBMI		31%	3,000		SO
SK	SZVK	43	21%	1,148	11%	S

*Notes: Table includes only members of UEPG relevant to this sector. The members of UEPG not included in this report are BAPIM in Bulgaria (not sector-related), PPAM in Romania (no information available) and MPA in the UK (no information available). * Employer organisations shown with grey shading are also affiliates of other sector-related European associations. ** C = congruence; O = overlap; S = sectionalism; SO = sectional overlap. ^a UEPG requested to be noted here: The forum Mineralische Rohstoffe commented: 'Together with the Forum Rohstoffe, a working group on voluntarily basis of membership, FSKI represents more than 300 companies, 75% sectoral density, around 2,500 employed (75% sectoral density). FSKI is by law the association for industrial lead companies and there is another association for construction materials producers on a crafts level, BIB. Forum Rohstoffe combines these two associations' competences.' ^b A footnote to Table 2 clarified that the number of 13,902 employees in Belgium covered by Fediex is the sum of 3,128 employees and 10,774 self-employed. Fediex contested this number via UEPG but, at the time of writing, had not provided a more accurate number. ^c Through UEPG, MIRO requested to be noted that it represents 11 regional member associations, with a total of 1,500 member companies; according to the report of Eurofound's national correspondent, there were only 13 affiliated companies. ^d UEPG clarified that some federations under COMINROC are members of UEPG but COMINROC is in fact not directly a member. ^e This is the proportion/density for the entire extractive industries sector as defined by the NACE Rev. 2 Divisions 05, 07, 08 and 09 in Table 1.*

This report is not intended to calculate density figures for subsectors, though it can be assumed that if such a density figure was calculated for the aggregates sector only, it would be much higher.^f Via UEPG, FdA requested to be noted here that 'FdA represents about 60%'. According to the information provided by Eurofound's national correspondent, however, the calculation resulted in 62.5% density in terms of companies and 80% in terms of workforce of the affiliated companies.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Of the 19 organisations affiliated to UEPG, 5 are involved in sector-related bargaining (Table 21). In five EU Member States (Austria, Belgium, France, Hungary and Portugal), UEPG has each time one affiliate involved in collective bargaining. From these five countries, FSKI and Fedieux are also affiliated to IMA Europe, and Aniet and MBSZ are also affiliated to Euromines. UNPG from France is the only affiliate of UEPG that is involved in collective bargaining and is not affiliated to another European association. It should be noted here that UEPG has a different interpretation. The methodology used here is that all organisations that only have members that are sector-related (see Annex I for a definition) are included in this report. Three UEPG organisations are not included (see footnote to Table 20).

As shown in Table 21, 14 of the 19 UEPG affiliates are consulted on sector-related policymaking. For five affiliates, this happens on a regular basis; for eight others it is on an ad hoc basis and for one affiliate there is no information on the regularity of the consultations. One of the UEPG affiliates is not consulted, while for four others there is no information available. In 12 different EU Member States (Austria, Belgium, Croatia, Cyprus, Denmark, Germany, Hungary, the Netherlands, Poland, Slovakia, Spain and Sweden), UEPG has an affiliate involved in sector-related policymaking.

Of the five members involved in collective bargaining (

Table 21), only one organisation (UNPG in France) has no membership in other EU-level social partner organisations. UNPG has 900 member companies, all in the sector (the sectoral density reported is 54.2%; data on the number of employees are not available) and covers only the extraction of granulate (NACE 8.12). UNPG is also affiliated to UNICEM (national affiliation).

Table 21: Involvement in collective bargaining and in sector-related policymaking of the sector-related members of UEPG

	Employer organisation	Sector collective bargaining	Consulted*	Ad hoc or Regular
AT	FSKI	Yes, multi-employer bargaining only	Yes	Regular
BE	Fedieux	Yes, multi-employer bargaining only	Yes	Ad hoc
CY	CAPA	No	Yes	Ad hoc
DE	BV MIRO	No	Yes	Ad hoc
DK	Danske Råstoffer	No	Yes	Ad hoc
ES	COMINROC (indirectly affiliated)	No	Yes	Ad hoc ^a
	FdA	No	Yes	Ad hoc ^b
FI	Infra	No	No	N.A.

	Employer organisation	Sector collective bargaining	Consulted*	Ad hoc or Regular
FR	UNPG	Yes, multi-employer bargaining only	N.A.	N.A.
HR	PROMINS	No	Yes	Ad hoc
HU	MBSZ	Yes, both single and multi-employer bargaining	Yes	Regular
IE	ICF	No	N.A.	N.A.
LV	BRA	No	N.A.	N.A.
NL	Cascade	No	Yes	Regular
PL	PZPK	No	Yes	Regular
PT	ANIET	Yes, multi-employer bargaining only	N.A.	N.A.
SE	SBMI	No	Yes	Regular
SK	SZVK	No	Yes	N.A.

*Notes: * Consulted by the country's government on sector-related policymaking. ^a According to the information collected by Eurofound's national correspondent, the frequency of the consultation had to be considered as happening on an ad hoc basis. UEPG reported that this is happening both on a regular and on an ad hoc basis. ^b According to the information collected by Eurofound's national correspondent, the frequency of the consultation had to be considered as happening on an ad hoc basis. UEPG reported that this is happening both on a regular and on an ad hoc basis. N.A. = information not available.*

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

APEP

APEP stands for Association des Producteurs Européens de Potasse (European Potash Producers' Association in English). APEP does not have a website.

APEP reported that it acts on behalf of four European potash manufacturers. Of these four companies affiliated to APEP, three are sector-related and involved in single employer collective bargaining (Table 22). All three of these are also affiliated to national employer organisations affiliated to Euromines. K+S Kali GmbH from Germany is also a member of VKS, which is organised in Euromines. Iberpotash is also represented via Confedem, the Spanish Euromines affiliate, and CPL Cleveland Potash Limited (UK) is also a member of MAUK, the UK member organisation of Euromines. APEP has a fourth member in France (K+S France SAS), which is reported not to be sector-related.

K+S Kali GmbH employs 14,295 workers in Germany, though as the company is also active outside the extractive industries sector (Sectionalism overlap) it is not clear what proportion of the sector this company is covering in Germany. Also for Iberpotash there is no information on its sectoral coverage.

Table 22: Involvement in collective bargaining and in sector-related policymaking of the sector-related members of APEP

	Employer organisation*	collective bargaining	Consulted**	Regular or ad hoc
DE	K+S Kali GmbH	Single employer collective bargaining	N.A. / No ^b	N.A.
ES	Iberpotash	Single employer collective bargaining		N.A.
UK	CPL Cleveland Potash Limited	Single employer collective bargaining		N.A.

*Notes: Table includes only members of APEP relevant to this sector. APEP also has a fourth member company in France (K+S Kali France SAS). This organisation is not taken into account in this report because it is reported not to be sector-related. * Companies are shown in bold. ** Consulted by the country's government on sector-related policymaking. ^b APEP reported that, to its knowledge, these companies have not been consulted. As for the Eurofound national correspondents, no information was available to answer this question. N.A. = information not available.*

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Conclusion: membership composition of European employer organisations

On the employers' side, 86 sector-related employer organisations are affiliated to one of the five European level employer organisations (Table 23). All together, these five employer organisations together have affiliates in 24 of the 28 EU Member States. No employer organisations were identified in Estonia, Lithuania and Malta. There is an employer organisation in Luxembourg, FEDIL, but it is affiliated to BusinessEurope and but not to one of the five sector-related European employer organisations.

At least one of the five European employer associations listed in Table 23 has:

- at least one affiliate involved in collective bargaining in 19 EU Member States;
- at least one affiliate that reports to be involved in multi-employer collective bargaining in 15 EU Member States (Austria, Belgium, Bulgaria, Czech Republic, Finland, France, Germany, Greece, Hungary, Italy, Poland, Portugal, Spain, Sweden, UK)

The two columns on the right in Table 23 indicate the number of affiliates involved in multi-employer collective bargaining and the number of EU Member States, in which there are affiliates involved in multi-employer bargaining, respectively. For Euromines there are nine affiliates involved in multi-employer bargaining in eight different countries. For EURACOAL, there are five affiliates in four different countries and for IMA Europe there are eight affiliates in six different EU Member States. All five UEPG affiliates are involved in multi-employer collective bargaining, while for APEP it is none. All five European employer associations together have 23 affiliates involved in multi-employer collective bargaining in 16 different EU Member States.

Table 23: Membership composition of European employer organisations

	Sector-related employer organisations and companies		Affiliates involved in collective bargaining		Affiliates involved in multi-employer collective bargaining	
	Number	In number of countries	Number	In number of countries	Number	In number of countries
Euromines	23	15	12	10	9	8
EURACOAL	12	10	8	7	5	4
IMA Europe	30	14	11	8	8	6
UEPG^a	19	17	5	5	5	5
APEP	3	3	3	3	0	0
Total	86 ^b	24 ^c	40 ^b	19 ^d	23 ^b	16

Notes: ^a This report includes only organisations that have members that are sector-related (see Annex I for a definition). The members of UEPG not included in this report are BAPIM in Bulgaria (not sector-related), PPAM in Romania (no information available) and MPA in the UK (no information available). ^b Including double affiliations. ^c No employer organisations were identified in Estonia, Lithuania and Malta. The one employer organisation identified in Luxembourg is not affiliated to any of the five sector-related employer organisations. ^d All EU28 countries apart from Estonia, Lithuania and Malta (where no employer organisations were identified) and Croatia, Denmark, Latvia, Luxembourg, the Netherlands and Romania.

Taking all five European employer associations together, they count for 44 affiliates that are consulted on sector-related policymaking (corrected for double affiliations). For 23 of them this is on a regular basis, while for 27 others on an ad hoc basis. Eight of their affiliates are not consulted and there is no information available for 31 others (Table 24). Five of the national organisations report affiliations to more than one of the five European level employer associations that are part of the Sectoral Social Dialogue Committee:

- MBSZ (Hungary): Euromines and UEPG;
- ANIET (Portugal): Euromines and UEPG;
- Patromin (Romania): Euromines and EURACOAL;
- FSKI (Austria): IMA Europe and UEPG;
- Fediex (Belgium): IMA Europe and UEPG;

At least one of these five European employer associations has at least one affiliate involved in sector-related policymaking in 19 EU Member States (Austria, Belgium, Croatia, the Czech Republic, Cyprus, Denmark, Finland, France, Germany, Hungary, Italy, the Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Sweden and the UK).

Table 24: Consultation affiliates of employer organisations

	Consulted on sector-related policymaking					Information not available	Not consulted
	Number consulted	Number of countries	On regular basis	Ad hoc basis	No information on frequency		
Euromines	10	8	5	5		9	3
EURACOAL	8	7	4	4		3	1
IMA Europe	16	10	6	10		13	3
UEPG	14	12	5	8	1	4	1
APEP						3	
Total	44 ^a	19	23	27	1	31	8

Note: ^a Corrected for double affiliations.

A total of 32 national sector-related employer organisations identified by this study are not affiliated to any of the five European level employer organisations that are part of the Sectoral Social Dialogue Committee (Table 25). These are spread over 13 Member States, and have a domain coverage that is sectionalism (3 organisations), sectionalism overlap (18 organisations) or overlap (6 organisations); for the remaining organisations the domain coverage is not known.

Table 25: National sector-related employer organisations not affiliated to any of the five European employer organisations

	Employer organisation*	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage**
AT	BIB					SO
BE	Belbag					
	Federation des carrières de gres					
	Fédération des carrières de petit granit – pierre blue de Belgique	9	0.1%	750	24%	S
	UCSMB			500	16%	O
DE	VRB					O
ES	Confevicex	2				SO
FI	Kiviteolisuusliitto	10	1%	200	4%	SO
	Koneyrittäjät	300	34%	1,000	19%	SO
	Metsäteollisuus	1	0.1%	150	3%	SO
	Rakennustuoteteollisuus RTT	1	0.1%	458	9%	SO
FR	SNCraie	2				S
	UNICEM					SO
HR	HUP	45	16%	1,500	36%	O
IT	ANIEM – CONFAPI					SO
	ANIEM – CONFIMI					SO
	CASartigiani					SO
	CLAAI					O
	CNA Costruzioni					SO
	CNA Produzione					SO
	Confartigianato Legno Arredo					SO
	Confartigianato Marmisti					
	Confindustria ANEPLA					SO
Confindustria Marmomacchine					S	
LU	FEDIL	3	30%	203	76%	O
PT	Agricultural Cooperative of Fruit of the Cova da Beira					

	Employer organisation*	Members in sector (companies)	Sectoral density (%)	Members in sector (workforce in companies)	Sectoral density (%)	Domain coverage**
	Sanchez S.A.					
SE	BÄF					SO
SI	EZS-GZS	10	11%			SO
	ZDS					SO
	SKM-GZS	3	3%	250	9.5%	SO
SK	ZHTPG	14	7%	6,400	62%	O

Notes: * Companies are shown in bold. ** O = overlap; S = sectionalism; SO = sectional overlap.

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Capacity to negotiate

One of the European Commission's criteria for EU-level social partners to be consulted under Article 154 TFEU states that they:

shall consist of organisations, which are themselves an integral and recognised part of Member State social partner structures; have the capacity to negotiate agreements (as referred to in Article 155 TFEU); and be representative of several Member States.

The European sectoral social partners should hence be able to prove their capacity to negotiate on behalf of their members and to enter into 'contractual relations, including agreements' (Article 155 TFEU), for example, the capacity to commit themselves and their national affiliates. It is worth stressing that this criterion does indeed refer to the negotiation of agreements as provided for in Article 155 TFEU.

A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate in accordance with a given mandating procedure.

The mandate/mandating procedure can be either statutory, that is, laid down in the statutes (constitution) of the organisation or annexed to them, or non-statutory, that is, laid down in secondary (formal) documents, such as rules of procedures, memoranda of understanding or decisions by the governing bodies of the organisation. The mandate will be described in terms of the conditions and procedure for the European social partner organisation to be given the authorisation to enter into a specific negotiation, as well as for the ratification of a possible agreement. If no such formal mandating procedure can be identified, it should be considered that the condition concerned is not fulfilled.

The European social partners from the extractive industries sector were asked to provide copies of their statutes, together with any other documentation describing their mandate and capacity to negotiate as well as the ratification of procedures in place. This section assesses the capacity to negotiate for all involved European social partners.

The European Sector Social Dialogue Committee for the extractive industries has issued several texts. These are all joint opinions, declarations or process-oriented texts. The exception is the European Network on Silica (NEPSI) **Agreement on workers' health protection through the good handling and use of crystalline silica and products containing it** signed in 2006.

However, as discussed in the Eurofound report, **Dynamics of European social dialogue**, this binding agreement is not related only to the extractive industries sector (overlap) and was not signed by all the actors involved in the European Sector Social Dialogue Committee).

The NEPSI agreement was signed by IndustriALL Europe on the trade union side and by Euromines, IMA Europe, UEPG and 13 other European employer associations.

Recent achievements of the extractive industries European Sector Social Dialogue Committee include:

- Budapest III joint declaration on coal policy (2012);
- Joint position – Reinhard Butikofer report (2011);
- opinion of the social partners on the potential unilateral increase of the EU greenhouse gas reduction target to -30% (2010).

IndustriALL Europe

An annex to IndustriALL Europe's statutes clarifies in detail its internal mandating procedure for negotiations. These procedures are different for negotiations at sector and at company level. They involve:

- information and consultation of affiliates before and during the negotiations;
- how negotiators are delegated;
- how they can negotiate and come to an agreement.

It is also set out how agreements are to be implemented and what to do if no agreement can be reached. Hence, IndustriALL Europe has a general mandate to negotiate on behalf of its members.

IndustriALL Europe signed the NEPSI Agreement.

Euromines

The internal rules of Euromines include the following statement about its specific goals:

To represent the collective views and interests of Members as appropriate and act as a principal point of contact with the industry's key constituencies in Europe, including social dialogue issues in as much as they are mandated by a decision of the GA in particular in the areas of health and safety, training and education, general EU policies, but excluding issues of tariffs and working time and related labour issues.

In other words, the General Assembly (GA) mandates the organisation to negotiate on behalf of its members for specific issues, and as such as has a general mandate.

Euromines signed the NEPSI Agreement.

EURACOAL

Although its statutes mention that EURACOAL participates in the European Union social dialogue and represents the common interest of its members, they do not include a mandate that describes the conditions and procedures to enter into a specific negotiation or ratification of a possible agreement. However, EURACOAL clarified that its statutes (notably article 2 and 6) have to be interpreted as follows: if EURACOAL needs to negotiate and enter into contractual relations, including agreements, the Executive Committee is in a position to present the issue to the General Assembly which is in power to activate this kind of mandate. There is therefore no need to specify in detail a particular procedure.

IMA Europe

IMA Europe's internal rules include a section on the mandating procedure to negotiate and ratify agreements in the sectoral social dialogue committee for the extractive industries. It states:

IMA Europe has been empowered to negotiate and ratify social dialogue agreements in the fields of health and safety at work, skills and education. On a proposal from the IMA Board of Directors, any proposed agreement from the social partners must be submitted for approval by the General Assembly after consultation of the national representatives.

IMA Europe signed the NEPSI Agreement.

UEPG

Following the June 2016 amendments of the statutes of UEPG, they now mention that one of the objectives of UEPG is as follows:

'To represent the collective views and interests of UEPG Members, and when appropriate to act on behalf of its Members, as a principal point of contact with the industry's key constituencies in Europe. This includes to negotiate and ratify social dialogue agreements, only when mandated by a decision of the Delegates Assembly on EU policies areas in general, and in particular, in the areas of health and safety, training and education. This excludes the issues related to collective bargaining, wages, benefits and working time.'

UEPG signed the NEPSI agreement.

APEP

The statutes of APEP do not include a capacity to negotiate and sign any agreement with other social partners on behalf of its members.

Other European trade union organisations

In addition to the membership of the European social partners, it is useful to look at other European organisations to which the sector-related trade unions and employer organisations are affiliated. Table 26 lists the European affiliations identified by Eurofound's Network of European correspondents on top of the European organisations included in this representativeness study:

Table 26: Affiliations to other European trade unions

Other European trade union organisations		Number of sector-related trade unions affiliated	In number of Member States
EFBWW	European Federation of Building and Woodworkers	15	11
UNI Europa		7	4
EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions	6	6
ETF	European Transport Workers' Federation	4	3
ETUC	European Trade Union Confederation	4	3
EPSU	European Federation of Public Service Unions	3	3
CEC European Managers		2	2
EFJ		1	1
CES (EVV)		1	1
EFBSU		1	1
Inter-regional trade union council Labe-Nisa		1	1
NTF		1	1
CESI	European Confederation of Independent Trade Unions	1	1
FEANI	European Federation of National Engineering Associations	1	1

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

A total of 15 sector-related trade unions are members of EFBWW (Table 27). Of these, three are affiliated to both EFBWW and IndustriALL Europe.

Table 27: Trade unions affiliated to EFBWW

	Trade union	Affiliations to European organisations	Number of employees covered	Number of members in the sector	Aggregate employment 2013	Collective bargaining	Sectoral density
AT	GBH	EFBWW	4,000	NA	5,874	Yes, multi-employer bargaining only	NA
BE	CGSLB-ACLVB	CES – EVV EFBWW – FETBB IndustriALL Europe	2,814	NA	3,128	Yes, both single and multi-employer bargaining	NA
	FGTB-CG/ABVV-AC	IndustriALL Europe UNI Europa EFBW EFBSU	5,000	NA	3,128	Yes, both single and multi-employer bargaining	NA
DE	IG BAU	EFBWW	42,000	NA	75,912	Yes, both single and multi-employer bargaining	NA
DK	3F	ETF, NTF, EFFAT, EFBWW, EPSU	NA	NA	2,137	Yes, both single and multi-employer bargaining	NA
EL	GFWECI	EFBWW IndustriALL Europe	1,800	200	9,270	Yes, multi-employer bargaining only	2.2%
ES	CCOO Construcción y Servicios	EFBWW, IndustriALL Europe	NA	NA	25,500	Yes, both single and multi-employer bargaining	NA
FR	Fédération BATI- MAT-TP (CFTC)	EFBWW	66,700	NA	26,778	Yes, both single and multi-employer bargaining	NA
FR	FNCB CFDT	EFBWW	66,700	NA	26,778	Yes, both single and multi-employer bargaining	NA
	FNSCBA CGT	EFBWW	66,700	NA	2,6778	Yes, both single and multi-employer bargaining	NA
	FO Construction	EFBWW	66,700	NA	26,778	Yes, both single and multi-employer	NA

	Trade union	Affiliations to European organisations	Number of employees covered	Number of members in the sector	Aggregate employment 2013	Collective bargaining	Sectoral density
						bargaining	
HR	SGH	EFBWW	450	NA	4,231	Yes, single employer bargaining only	NA
HU	ÉFÉDOSZSZ – KMDSZ	EFBWW	300	420	3,800	Yes, both single and multi-employer bargaining	11,1%
IT	Filca Cisl	EFBWW	12,500	NA	17,502	Yes, both single and multi-employer bargaining	NA
LV	LCA	EFBWW	NA	NA	3,063	No	NA

Note: NA = information not available

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Other European employer organisations

Table 28 shows the other affiliations of sector-related employer organisations.

All European affiliations of the trade unions and employer organisations are noted in Table 32 and Table 33 in Annex II ([available on the webpage for this study](#)).

Table 28: Affiliations to other European employer organisations

Other European employer organisations		Number of sector-related employer organisations affiliated	In number of Member States
UEAPME	European Association of Craft, Small and Medium-sized Enterprises	5	1
Euroroc	European and International Federation of Natural Stone Industries	5	4
BusinessEurope		4	4
Eurogypsum		3	2
Construction Products Europe^a		2	2
ECI	European Copper Institute	2	1
EMU	European Metal Union	2	1
Eurelectric		2	1
EMO	European Mortar Organisation	1	1
Ceramic Unie		1	1
EIC	European International Contractors	1	1
FIEC	European Construction Industry Federation	1	1
Cembureau		1	1
CEI-bois	European Confederation of Woodworking Industries	1	1
CEPI	Confederation of European Paper Industries	1	1
FEPA	Federation of the European Producers of Abrasives	1	1

Note: UEPG and IMA Europe are associated members of Construction Products Europe (CPE).

Source: Panteia, based on national contributions by Eurofound's Network of European correspondents (2015).

Conclusions

Objective and demarcation of the study

The aim of this representativeness study is to:

- identify the sector-related national and supranational social partners (that is, the trade unions and employer organisations) in the field of industrial relations in the extractive industries sector (as defined by the following NACE Rev. 2 Mining and quarrying divisions: 05 Mining of coal and lignite; 07 Mining of metal ores; 08 Other mining and quarrying; and 09 Mining support service activities);
- show how these actors relate to the sector's European interest associations of labour and business.

For the extractive industries sector, the European Sectoral Social Dialogue Committee consists of:

- IndustriALL Europe;
- European Association of Mining Industries (Euromines);
- European Association for Coal and Lignite (EURACOAL);
- European Industrial Minerals Association (IMA Europe);
- European Aggregates Association (UEPG);
- European Association of Potash Producers (APEP).

Employment and economic trends

The sector employed 738,000 people in 2013. The relative importance of the sector in the total employment of each country is quite low: except for Bulgaria, Estonia and Poland, the share of employment in extractive industries is below 1% of total employment. At the EU28 level, employment was lower by the end of 2013 compared with the first quarter of 2008. Most countries have experienced significant declines in employment. The trends in the number of companies in the sector show considerable differences between countries. The share of female employees is very low, generally below 20%.

National level of interest representation

For this study, 98 sector-related trade unions were identified. Estonia, Lithuania and Malta are the only countries where no sector-related trade union was identified. In all other countries, at least one trade union was identified that fulfils the criteria to be included in the representativeness study.

Two of the 98 identified trade unions (2%) demarcate their domain congruent with the sectoral definition, while 46% of the trade unions (44 trade unions) have a domain pattern that shows overlap with the sector under scrutiny. A similar share of the trade unions (44% or 44 in absolute terms) shows sectional overlap with the sectoral definition. Sectionalism is recorded for 7 out of 98 trade unions (7%).

Membership of the sector-related trade unions is voluntary in the EU28 Member States. All trade unions indicated voluntary membership; only OOIMSEK in Cyprus and FZZGWB in Poland did not answer this question.

Based on the available information in the national contributions compiled by Eurofound's Network of European correspondents, sectoral density could be calculated for 40 out of 98 trade unions. The results vary from a sectoral density of 0.4% to 61.1%. It can be concluded that most trade unions show low to very low sectoral densities. There is no clear cross-country pattern when comparing the figures.

In total, 114 sector-related employer organisations (and companies) were identified. Like the findings regarding trade unions, all countries except Estonia, Lithuania and Malta have at least one employer organisation that fulfils the criteria to be included in the representativeness study.

Sectional overlap is the most widespread domain pattern, with 46% of the employer organisations (52 organisations). Sectionalism is the second most prevalent domain pattern (24% or 28 organisations), followed by overlap, with 12% of the employer organisations (14 organisations) reporting this to be their domain pattern. Finally, only 3% (3 organisations) reported congruence as a domain pattern. This is a similar result to that found for the trade unions, where two organisations had a congruent domain pattern. It was not possible to determine the domain pattern for 15% of the employer organisations.

Only in Austria did sector-related employer organisations rely on obligatory membership.

The sectoral density rates of employer organisations can be considered in terms of companies or in terms of their workforce. First, sectoral density rates can be expressed as a proportion of companies, taking the number of companies affiliated to the employer organisation and dividing this by the total number of companies. Second, employer density rates can be calculated in terms of the workforce of these affiliated companies divided by the total workforce in the entire sector. Generally speaking, the figures in this representativeness study show a higher employer organisation sectoral density rate in terms employees than in terms of affiliated companies. In principle, this points at a higher density of affiliated companies among the companies with a larger workforce, and a lower affiliation among the companies with a smaller workforce in the sector.

Collective bargaining

A total of 89 out of the 98 trade unions identified are involved in sector-related collective bargaining. Latvia is the only country where none of the identified trade unions is involved in sector-related collective bargaining. Almost half the trade unions (45.7%) is involved in both single and multi-employer collective bargaining. A similar share of the trade unions is involved in only multi-employer collective bargaining (22.3%) or in only single employer collective bargaining (23.4%).

A total of 67 out of the 114 employer organisations (and companies) are involved in sector-related collective bargaining. In Latvia, Luxembourg, the Netherlands and Romania, no employer organisation is involved in collective bargaining. However, it should be noted that for each of these countries only one employer organisation was identified. Some 38% of the employer organisations are not involved in collective bargaining. A similar proportion (34.3%) is involved in multi-employer collective bargaining, whereas 13.9% is involved in both single and multi-employer bargaining. Another 13.9% is involved in single employer collective bargaining.

Distinguishing the employer organisations from the individual companies shows that 13 companies are involved in single employer collective bargaining and 11 are not involved in collective bargaining. Among the 85 employer organisations, 37 are involved in multi-employer collective bargaining. Two employer organisations are involved in single employer collective bargaining only, while 15 are involved in doing both single employer and multi-employer collective bargaining.

Participation in public policy

A total of 55 out of the 98 trade unions indicated that they are consulted. For 15 of the 55 unions, this is on a regular basis and for 38 it is on an ad hoc basis. Two of the 55 unions reported that they are consulted but did not specify if this was on an ad hoc or regular basis.

A total of 22 trade unions reported that they are not consulted while there was no information available for 20 trade unions. In Croatia, Cyprus, Ireland, Latvia and the UK, none of the trade unions reported to be consulted (either 'no' or 'no information available').

A total of 61 out of the 114 employer organisations (and companies) reported that they are consulted, while 12 organisations indicated that no consultation takes place and, in 41 cases, there was no information available. A total of 23 out of these 61 reported to be consulted regularly, 36 on an ad hoc basis. Two of the 61 organisations that report they were consulted did not specify if this was on an ad hoc or regular basis. In all countries where employer organisations are identified, these organisations were consulted apart from in Bulgaria, Greece, Ireland and Latvia. In 18 EU Member States, at least one trade union and one employer organisation reported being consulted on public policymaking. In five countries, only trade union(s) or employer organisation(s) reported that they were consulted. In the three countries where no sector-related trade unions or employer organisations were identified ((Estonia, Lithuania and Malta), there is obviously no participation of social partner organisations in public policymaking; this also does not happen in Ireland or Latvia.

Tripartite and bipartite participation

Tripartite and bipartite bodies were identified in 17 countries. In the Czech Republic, Denmark, France, Hungary and Italy, only bipartite bodies were identified. In Austria, Bulgaria, Latvia, Malta, Poland, Romania, Slovenia, Spain and the UK, only tripartite bodies were identified. In Belgium, Slovakia and Sweden, both bipartite and tripartite bodies were identified.

European level of interest representation

IndustriALL Europe has at least one sectoral affiliation in 21 countries out of the 25 EU Member States where sector-related trade unions were identified. The missing Member States are the Czech Republic, Cyprus, Latvia and Slovakia. Of the 52 trade unions affiliated to IndustriALL Europe, 43 are involved in sector-related bargaining.

Euromines has sectoral affiliations in 14 out of the 25 EU Member States where employer organisations were identified. The missing Member States are Belgium, Croatia, Cyprus, Denmark, France, Italy, Luxembourg, Latvia, the Netherlands, Romania and Slovenia. A total of 23 of the 114 employer organisations are affiliated to Euromines; 12 of these affiliates are involved in sector-related bargaining.

EURACOAL has sectoral affiliations in 11 countries. The missing Member States are Austria, Belgium, Croatia, Cyprus, Denmark, Finland, France, Hungary, Ireland, Italy, Luxembourg, Latvia, the Netherlands, Portugal and Sweden. A total of 13 of the 114 employer organisations are affiliated to EURACOAL; 9 of these affiliates are involved in sector-related bargaining.

IMA Europe has sectoral affiliations in 15 countries. The missing Member States are Bulgaria, Croatia, the Czech Republic, Denmark, Hungary, Ireland, Latvia, Luxembourg, the Netherlands, Romania and Slovenia. A total of 31 of the 114 employer organisations are affiliated to IMA Europe; 12 of these are involved in sector-related bargaining.

UEPG has sectoral affiliations in 17 countries. The missing Member States are Bulgaria, the Czech Republic, Greece, Italy, Luxembourg, Romania, Slovenia and the UK. A total of 19 organisations are affiliated to UEPG, of which 5 are involved in sector-related bargaining. UEPG has stated that it has a different interpretation and claims that it covers 20 EU Member States.

Within the scope of the extractive industries sector, three companies report affiliation to APEP. K+S Kali GmbH is based in Germany (and via VKS affiliated to Euromines) and Iberpotash in Spain (is affiliated to Confedem, the Spanish member of Euromines) and CPL Cleveland Potash Limited from the UK (is a member of MAUK the UK member of Euromines). All three are involved in single employer collective bargaining. APEP has one more potash-producing company as affiliate in France though it was reported not to be sector-related.

On the employers' side, a total of 85 sector-related employer organisations are affiliated to one of the five European level employer organisations, covering all EU28 countries apart from Estonia, Lithuania and Malta (where no employer organisation was identified) and Luxembourg.

Capacity to negotiate

One of the criteria of the European Commission for EU-level social partners to be consulted under Article 154 TFEU states that they:

shall consist of organisations, which are themselves an integral and recognised part of Member State social partner structures; have the capacity to negotiate agreements (as referred to in Article 155 TFEU); and be representative of several Member States.

A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate in accordance with a given mandating procedure.

The study shows the following:

- IndustriALL Europe has a general mandate to negotiate on behalf of its members.
- The General Assembly of Euromines mandates the organisation to negotiate on behalf of its members for specific issues.
- Although EURACOAL's statutes mention that EURACOAL participates in the European Community social dialogue and represents the common interest of its members, it does not include a mandate that describes the conditions and procedures to enter into a specific negotiation or ratification of a possible agreement. However, EURACOAL clarified that its statutes (notably article 2 and 6) have to be interpreted as follows: if EURACOAL needs to negotiate and enter into contractual relations, including agreements, the Executive Committee is in a position to present the issue to the General Assembly which is in power to activate this kind of mandate. There is therefore no need to specify in detail a particular procedure.
- IMA Europe's internal rules include a section on the mandating procedure to negotiate and ratify agreements in the sectoral social dialogue committee for the extractive industries.
- Since June 2016 UEPG's statutes mention that one of its objectives is:

'To represent the collective views and interests of UEPG Members, and when appropriate to act on behalf of its Members, as a principal point of contact with the industry's key constituencies in Europe. This includes to negotiate and ratify social dialogue agreements, only when mandated by a decision of the Delegates Assembly on EU policies areas in general, and in particular, in the areas of health and safety, training and education. This excludes the issues related to collective bargaining, wages, benefits and working time.'

Before, some kind of ad hoc procedure must have allowed the organisation to sign the NEPSI agreement.

- APEP's statutes do not include a capacity to negotiate and sign any agreement with other social partners on behalf of its members.

Other European organisations

This study shows that sector-related trade unions and employer organisations are also affiliated to a range of other European level organisations. A total of 15 of the trade unions are also affiliated to EFBWW, 7 to UNI Europa and 6 to EFFAT. Five of the employer organisations are affiliated to UEAPME and five to Euroroc.

Evaluation of representativeness of the trade union

On the trade union side, there is only one European association. IndustriALL Europe has affiliates in 21 EU Member States (Table 29). It has affiliates involved in collective bargaining in 20 EU Member States and affiliates involved in multi-employer collective bargaining in 17 EU Member States. Of the 98 sector-related trade unions, 52 affiliated to IndustriALL Europe and 33 of those are consulted on sector-related policymaking. In 16 EU Member States, IndustriALL Europe has at least one affiliate consulted on sector-related policymaking.

Table 29: Evaluation of the representativeness of the European trade union organisation

Trade union	Number of EU Member States in which ...			
	... there are affiliates	... affiliates involved in collective bargaining	... affiliates involved in multi-employer collective bargaining	... affiliates are consulted on sector-related policies
IndustriALL Europe	21	20	17	16

Analysis of other relevant European social partner competitors shows that 15 trade unions are affiliated to EFBWW. Of these 15 trade unions, 3 have a double membership (affiliated to both EFBWW and IndustriALL Europe). The remaining 12 organisations are not members of IndustriALL Europe.

From this study it can be concluded that IndustriALL Europe is a representative European social partner organisation for the extractive industries sector.

Evaluation of representativeness of the employer organisations

On the employers' side, there is a much higher degree of fragmentation, with five different European associations. All five together have affiliates in 24 different EU Member States (Table 30). At least one of the five employer organisations has an affiliate involved in collective bargaining in 19 EU Member States; for multi-employer collective bargaining, this is the case in 16 different EU Member States. Taking the affiliates of all these five European associations together, they have affiliates that are consulted on sector-related policymaking in 19 different EU Member States.

Table 30: Evaluation of the representativeness of the European employer organisations

Employer organisations and companies	Number of EU Member States in which ...			
	.. there are affiliates	... affiliates involved in collective bargaining	... affiliates involved in multi-employer collective bargaining	... affiliates are consulted on sector-related policies
Euromines	14	10	8	8
EURACOAL	10	7	4	7
IMA Europa	14	8	6	10
UEPG	17	5	5	12
APEP	3	3	0	0
All five together	24	19	16	19

Note: UEPG has a different interpretation and claims to cover 20 EU Member States. See the previous chapter for an explanation of the figures.

Based on the EU geographical coverage of Euromines and the high density figures in terms of sector-related workforce covered in a significant number of EU Member States, the number of countries where it has affiliates involved in collective bargaining and sector-related policies, and last but not least its statutory mandate to negotiate on behalf of its members, it can be concluded that Euromines is a representative European social partner organisation for the extractive industries sector.

Taking into consideration the same criteria, it can be concluded from the findings in this study that IMA Europe is also a representative European social partner organisation for the extractive industries sector. Its statutes foresee a procedure where agreements can be proposed and approved by the General Assembly.

UEPG has the widest EU geographical coverage with affiliates in 17 EU Member States. In 12 EU Member States, its affiliates are consulted in sector-related policymaking, and in terms of companies and workforce coverage, it has significant density figures. However, the involvement of the UEPG affiliates in collective bargaining activities is limited. Of the five UEPG affiliates involved in collective bargaining, four are also affiliated to other European associations. This double affiliation is explained by the fact that UEPG is organising the specific interest in the aggregates subsector. Regarding its capacity to negotiate, since June 2016 UEPG has included a capacity to negotiate in article 5 of its statutes. Before, some kind of ad hoc procedure must have allowed the organisation to sign the NEPSI agreement. Therefore, it can be concluded that UEPG is also a representative European social partner organisation for the extractive industries sector.

EURACOAL does not have a mandating procedure and, unlike UEPG, it has never shown its capacity to negotiate and sign agreements on behalf of its members on an ad hoc basis. The domain covered by EURACOAL is the subsector of coal and lignite mining. As this activity is not operated in all EU Member States, EURACOAL's geographical coverage in terms of EU Member States is limited. In the countries it covers, however, EURACOAL does have a high density in terms of proportion of the sector workforce covered. This is the case in Bulgaria, the Czech Republic, Germany, Greece, Hungary, Poland, Romania, Slovakia and Slovenia. The affiliates in Hungary, Romania and Slovakia, however, are also affiliated to either Euromines or UEPG. Considering all these aspects together, the conclusion of this study is that EURACOAL

on its own can be considered as a representative European social partner organisation for the extractive industries subsector of coal and lignite mining.

Within the scope of the sector studied here, APEP represents three companies that are involved in single employer collective bargaining. One of them, K+S Kali GmbH from Germany, is also represented by Euromines through its member VKS. Iberpotash is also represented via Confedem the Spanish Euromines affiliate and CPL Cleveland Potash Limited (UK) is also a member of MAUK, the UK member organisation of Euromines. APEP has a fourth member in France (K+S France SAS), which is reported not to be sector-related.

APEP has one more potash-producing company as an affiliate in France which was reported not to be sector-related. Without sufficient information on its sectoral density or coverage, and without the capacity to negotiate on behalf of its members, APEP cannot be considered as a representative European social partner organisation for the extractive industries sector. Its contribution to the collective representativeness of the European Sector Social Dialogue Committee is limited to three companies, each of which is also a member of the national Euromines affiliate from Germany, Spain and the UK.

No other relevant European association organising sector-related employer organisations or companies has been identified. However, there are a number of national sector-related employer organisations that are not yet affiliated to any European association. These are listed in Table 25.

Overall evaluation of collective representativeness

From this study, it can be concluded that IndustriALL Europe, together with the four European employers' associations – Euromines, EURACOAL, IMA Europe and UEPG – are collectively representative of both sides for the sector as defined by NACE Rev. 2 Divisions 05, 07, 08 and 09. However, there are a number of limitations (as noted above) concerning the capacity and representativeness of the individual employer organisations that need to be taken into account. The contribution of APEP to the collective representativeness is limited to three companies, each of which are also affiliated to members of Euromines.

EF/16/36

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Annexes

Annex I: Methodology

A full description of the methodology can be found in Eurofound's document, [Representativeness studies: Methodology](#). This annex presents some of the main methodological considerations.

Role of the national correspondents

The study consists of two parts: 28 national contributions and one overview report synthesising the contributions. Eurofound's network of national correspondents with expertise in industrial relations in place, covers all Member States. These experts are required to gather data on all relevant organisations at national level and to approach them by telephone or email, using standardised questionnaires. While the questionnaires are in English, correspondents can interview or contact the organisation in the relevant national language. The questionnaires are completed by the national correspondents. The standardised questionnaire for the national contributions has been developed by Eurofound, which is completed by Eurofound's network of correspondents to produce the 28 national contributions.

Criteria for inclusion in the study

European associations are analysed via the 'top-down' approach if they:

- are on the Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 TFEU;
- and/or participate in the sector-related European social dialogue.

The Commission may decide to include other EU sector-related organisations in the study, if relevant, for example, a sector-related organisation which has recently requested to be consulted under Article 154 TFEU.

A **national association** is considered to be a relevant sector-related interest association if it meets both criteria A and B:

A. The association's domain relates to the sector.

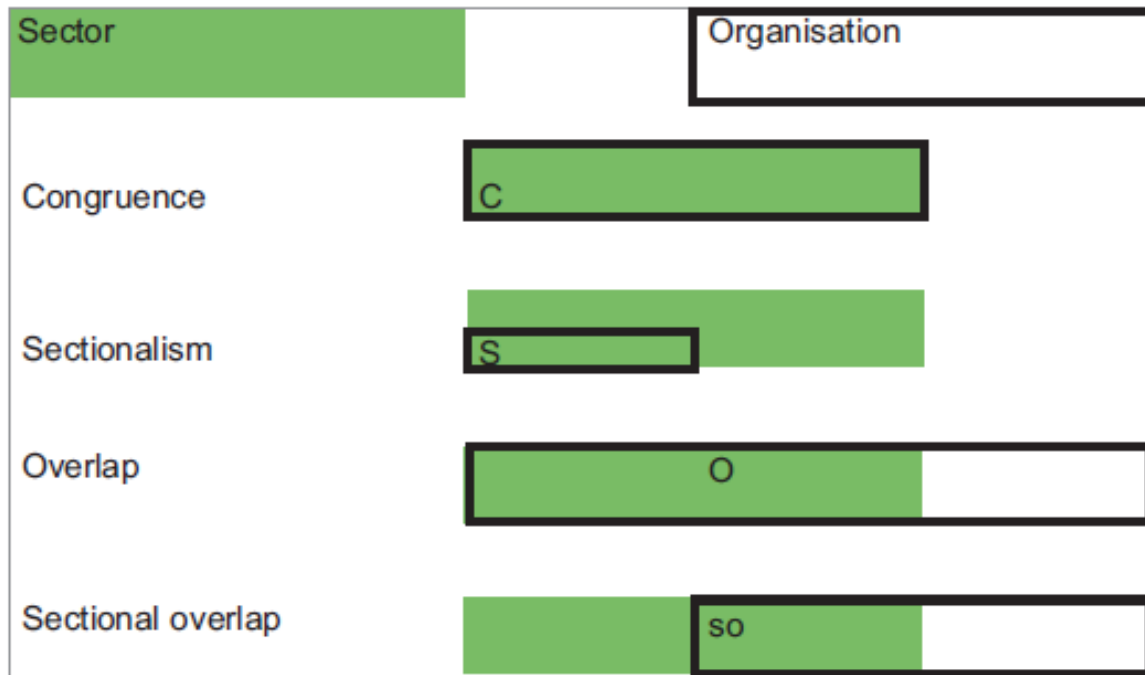
B. The association is either:

- affiliated to a European-level organisation, which is analysed in the study within the top-down approach (independent of their involvement in collective bargaining);
- or, if not, regularly involved in sector-related collective bargaining.

Determining sector-relatedness

European and national social partners are considered to be 'sector-related' if their membership domain relates to the sector in one of the ways listed in the table below. Put simply: any organisation organising membership in the sector is deemed to be sector-related.

Figure 10: Four types of sector-relatedness



In this study, domain patterns of organisations are determined based on the following questions:

- Does the organisation cover the ‘whole’ sector in terms of economic activities, (that is, including all sub-activities)?
- Does the organisation also cover employees or enterprises outside the sector?

Determining sectoral density

To assess organisations’ membership and relative strength within the sector, the report uses the data listed in the table below, collected through Eurofound’s Network of European correspondents:.

Type of organisation	Membership	Density
Trade union	Number of active members in employment Number of active members in employment in the sector	Sectoral density: Number of active members in employment in the sector divided by the total number of employees in the sector.
Employer organisation	Number of member companies Number of employees working in member companies Number of member companies in the sector Number of employees working in member companies in the sector	Sectoral density (companies): Number of member companies in the sector divided by the total number of companies in the sector. Sectoral density (employees): Number of employees working in member companies in the sector divided by the total number of employees in the sector.

Please note that the other annexes (listed below) are available in a separate document available on the [webpage for this study](#).

Annex II: Individual organisations

Annex III: Tripartite and bipartite sector-specific boards of public policy

Annex IV: Collective bargaining in the EU28 and Norway

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