RESEARCH REPORT

Eurofound

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Extractive industries sector

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Eurofound

European Foundation for the Improvement of Living and Working Conditions

When citing this report, please use the following wording:
Eurofound (2024), *Representativeness of the European social partner organisations: Extractive industries sector*, Sectoral social dialogue series, Dublin.

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Provider: Network of Eurofound Correspondents (Annex 2)

Eurofound project: Representativeness studies (170203)

PDF: ISBN 978-92-897-2449-4 doi:10.2806/1024192 TJ-01-24-012-EN-N

This report and any associated materials are available online at https://eurofound.link/ef23025

It is part of Eurofound's Sectoral social dialogue series. See the full series at https://eurofound.link/efs006

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CZ	Czechia	**HU**	Hungary	**PT**	Portugal
DE	Germany	**IE**	Ireland	**RO**	Romania
DK	Denmark	**IT**	Italy	**SE**	Sweden
EE	Estonia	**LT**	Lithuania	**SI**	Slovenia
EL	Greece	**LU**	Luxembourg	**SK**	Slovakia

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners (that is, the trade unions and employer organisations) in the extractive industries sector, and to show how they relate to the sector's European-level organisations representing employees and employers. The report is divided into five chapters: an introduction; an overview of the economic specificities and the employment trends in the extractive industries sector; an analysis of the social partner organisations in the 27 EU Member States; an analysis of the representativeness of the relevant European organisations, in particular their membership composition and capacity to negotiate; and conclusions, bringing together the main lessons from Chapters 1 to 3.

In this introduction, the objectives of the study are presented along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the extractive industries sector.

0.1. Objectives of the study

Representativeness studies are conducted for several reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is a criterion to be eligible for setting up a European sectoral social dialogue committee, or for participation in one of them, as laid down in Decision 500 of 1998.
- Representativeness studies are a means of assessing whether the European social partners have the capacity to negotiate agreements that can lead to implementation by Council decision, as provided by Article 155 of the TFEU, or whether such agreements can be implemented autonomously.

Beyond these three formal reasons based on Articles 154 and 155 of the TFEU and on Decision 500 of 1998, the assessment of the representativeness in this study allows organisations to identify opportunities for capacity building. It can also help clarify the importance of social partner organisations for social dialogue coordinators to other directorates-general (as set out in Section 3.3 in European Commission COM(2023)40) and provide support for applications for project funding.

Representativeness is defined by the Commission Decision on the establishment of European sectoral social dialogue committees promoting the dialogue between the social partners at European level (Decision 98/500/EC). For an organisation to be recognised as a representative EU-level social partner organisation it must:

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

To accomplish the aims of the study, this report first identifies the relevant national social partner organisations in the extractive industries sector before analysing the structure of the sector's relevant

European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European levels of interest representation. The study includes only organisations whose membership domain is classed as 'sector-related'. In terms of territorial coverage, the study includes the EU27 Member States.

0.2. European sectoral social dialogue committee for the sector

The ESSDC for the extractive industries sector has historical roots in the consultative committee for the Treaty of Paris (also known as the Treaty establishing the European Coal and Steel Community (ECSC)), which was signed by Belgium, France, Italy, Luxembourg, the Netherlands and West Germany in 1951. For the first time in history, European social dialogue was given an institutional forum via the ECSC consultative committee, which brought together representatives of producers, workers, consumers and traders from both the steel and coal sectors. This committee was consulted on aspects of industrial policy, including research and competition issues.

The ECSC ceased to exist in July 2002 (Eurofound, 2016a). In anticipation of this, European social partners asked in January 2001 for the establishment of an ESSDC for mining, as envisaged in Decision 500 of 1998.[1]

In 2002, the ESSDC for mining was created by the European Mine, Chemical and Energy Workers Federation (EMCEF), the European Association of Potash Producers (APEP) and the employer organisation for the solid fuels industry, Comité Européen des Combustibles Solides (CECSO).[2] CECSO evolved into the European Association for Coal and Lignite (Euracoal) in 2002, and EMCEF merged into IndustriAll Europe in 2012. The Industrial Minerals Association Europe (IMA-Europe) joined the committee in 2003, Euromines joined in 2004 and Aggregates Europe – UEPG became a member in 2009.

The current ESSDC consists of the following social partners:

- workers' representatives:

  IndustriAll European Trade Union (IndustriAll Europe)

- employers' representatives:

  European Association of Mining Industries (Euromines)
  European Association for Coal and Lignite (Euracoal)
  European Industrial Minerals Association (IMA-Europe)
  European Aggregates Association (Aggregates Europe – UEPG)[3]
  European Association of Potash Producers (APEP)

The committee has the following focus areas:

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[1] Between 2002 and 2006, the European Economic and Social Committee managed the social dialogue for the steel sector. The ESSDC for the steel sector was only created in 2006.

[2] Euracoal evolved in 2002 from CECSO after the expiry of the Treaty establishing the European Coal and Steel Community. Euracoal is the umbrella organisation of the European coal industry. The association can trace its roots back to 1952, when the Comité d'étude des producteurs de charbon d'Europe occidentale (Cepceo) was established.

[3] Since 2022, UEPG has introduced a new name, Aggregates Europe – UEPG, to underline the product it represents. The official name in the organisation's by-laws remains UEPG, which stands for Union Européenne des Producteurs de Granulats (European Aggregates Association in English and Europäischer Gesteinsverband in German).

- restructuring the different subsectors and retraining the workforce
- sharing useful practices and implementing training programmes on health and safety and risk prevention (such as the assessment and prevention of risks with a specific focus on the impact of chemical agents, asbestos and psychosocial risks)
- planning training, education and lifelong learning, and addressing skills challenges related to the twin transition
- monitoring the implementation of the energy union strategy, the Carbon Capture and Storage Directive, the Raw Materials Initiative, the European Innovation Partnership and the Circular Economy Package
- implementing social dialogue in new Member States
- fostering the societal acceptance of mines and quarries, including through responsible mining
- monitoring the follow-up and the specific implementing acts of the European Green Deal (Fit for 55, Green Deal Industrial Plan, Net-Zero Industry Act, Emissions Trading System)

Since the establishment of the ESSDC, 24 texts have been agreed upon (see Table 1). They are all joint opinions, mostly addressed to the European Commission. Some of the common themes are climate change, training and health.

Table 1: Agreed texts in the extractive industries sectoral social dialogue committee

Period	2000–2004	2005–2009	2010–2014	2015–2019	2020–2023	Total
Number of joint opinions	9	5	7	1	2	24

Source: *European Commission, undated-a, Social dialogue texts database*

European social partners have historically contributed to the energy transition away from coal and have in recent years been strongly involved in current and future energy policymaking oriented towards decarbonisation. The focus of the ESSDC has shifted from energy supply matters towards just transition concerns. A special section on the European Green Deal (see Section 1.1.2), and the close cooperation of social partners in this, will be further developed in the next chapter of this study.

0.3. Definitions and methodology

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

Criteria for analysing sector-relatedness in the extractive industries sector

The extractive industries sector is a complex sector, and defining a precise delimitation of the sector is challenging. In agreement with the European social partners, the sector was divided into 12 activities as meaningful parts of the sector in order to assess the sector-relatedness of each of the national social partner organisations (see Table 2).

Table 2: Activities and sectors of the extractive industries

NACE 5	Mining of coal and lignite
5.1	**Mining of hard coal** This class includes: ▪ mining of hard coal through underground or surface mining, including mining through liquefaction methods ▪ cleaning, sizing, grading, pulverising and compressing of coal to classify, improve quality or facilitate transport or storage This class also includes recovery of hard coal from culm banks.
5.2	**Mining of lignite** This class includes: ▪ mining of lignite (brown coal) through underground or surface mining, including mining through liquefaction methods ▪ washing, dehydrating, pulverising and compressing of lignite to improve quality or facilitate transport or storage
NACE 7	**Mining of metal ores**
7.1	**Mining of iron ores** This class includes: ▪ mining of ores valued chiefly for iron content ▪ beneficiation and agglomeration of iron ores
7.2	**Mining of non-ferrous metal ores** This group includes the mining of non-ferrous metal ores.
7.21	*Mining of uranium and thorium ores* This class includes: ▪ mining of ores chiefly valued for uranium and thorium content (such as pitchblende) ▪ concentration of such ores ▪ manufacture of yellowcake
7.29	*Mining of other non-ferrous ores* This class includes: ▪ mining and preparation of ores chiefly valued for non-ferrous metal content, including non-precious metals such as aluminium (bauxite), copper, lead, zinc, tin, manganese, chrome, nickel, cobalt, molybdenum, tantalum and vanadium ▪ mining and preparation of precious metals such as gold, silver and platinum
NACE 8	**Other mining and quarrying**
8.1 8.11	**Quarrying of stone, sand and clay** *Quarrying of ornamental and building stone, limestone, gypsum, chalk and slate* This class includes: ▪ quarrying, rough trimming and sawing of monumental and building stone such as marble, granite and sandstone ▪ breaking and crushing of ornamental and building stone ▪ quarrying, crushing and breaking of limestone ▪ mining of gypsum and anhydrite ▪ mining of chalk and uncalcined dolomite

8.12	*Operation of gravel and sand pits; mining of clays and kaolin (construction minerals)* This class includes: ▪ quarrying of stone, crushed rocks and extraction of sand and gravel for aggregates ▪ extraction and dredging of industrial sand for construction and gravel ▪ breaking and crushing of gravel ▪ quarrying of sand ▪ mining of clays, refractory clays and kaolin
	Quarrying, crushing and breaking of limestone (industrial minerals)[4] ▪ mining and quarrying of bentonite, diatomite, borates, feldspar, silica, calcium carbonate, kaolin, plastic clay, talc, sepiolite, vermiculite, mica, etc. ▪ mining and quarrying of aggregates obtained from recycling or via demolition
8.9	**Mining and quarrying (not elsewhere classified)**
8.91	*Mining of chemical and fertiliser minerals* This class includes: ▪ mining of natural phosphates and natural potassium salts ▪ mining of native sulphur ▪ extraction and preparation of pyrites and pyrrhotite (except roasting) ▪ mining of natural barium sulphate and carbonate (barytes and witherite), natural borates, natural magnesium, sulphates (kieserite) ▪ mining of earth colours, fluorspar and other minerals valued chiefly as a source of chemicals ▪ guano mining
8.92	*Extraction of peat*
8.93	*Extraction of salt*
8.99	*Other mining and quarrying activities (not elsewhere classified)*
NACE 9	**Mining support activities**
9.1	*Support activities for petroleum and natural gas extraction*
9.9	*Support activities for other mining and quarrying*

Notes: *Table 2 has been developed in close cooperation with European social partners to assess the notable subsectors within extractive industries and foster meaningful analysis of the sector-relatedness of different domains of national and European organisations. See also Table 61 in Annex 1 with all relevant NACE codes.*

Source: *Eurofound, 2021*

When the membership domains of trade unions and employer organisations fall exactly within the extractive industries sector as described here, this type of sector-relatedness is called ‘congruence’ in this report. If the membership domain of an organisation goes beyond extractive industries, it is called an ‘overlapping’ organisation. ‘Sectional’ is an organisation that covers a part of the extractive industries sector and nothing else, whereas ‘sectional overlapping’ is an organisation that covers part of the extractive industries sector and has membership in other sectors (see Table 3).

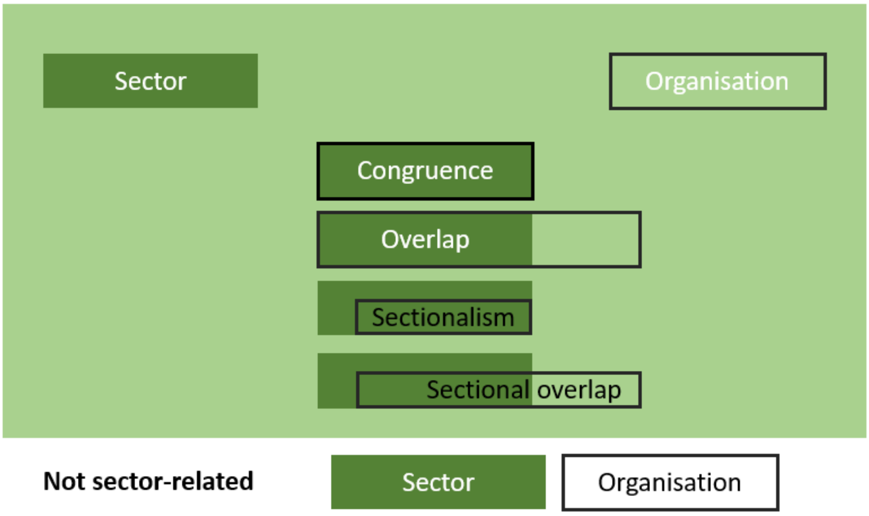
[4] These activities are not explicitly included in the NACE code description, but were added at the request of the European social partners of the sector in the preparation of this study.

Table 3: Membership domain patterns of an organisation

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the union/employer organisation embrace all employees/companies in the extractive industries sector?	Does the union/employer organisation also represent employees/companies outside the extractive industries sector?
Congruence	Yes	No
Overlap		Yes
Sectionalism	No	No
Sectional overlap		Yes

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

Figure 1: Four different types of sector-relatedness



Source: *Eurofound*

Sector-relatedness of the membership domain of organisations

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

Organisational capacity supporting effective participation

The organisational capacity of the European social partners is analysed in terms of their ability to commit themselves on behalf of their members and to conclude agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess their capacity to negotiate, the **actors** and their objectives and decision-making structures provided in their statutes are considered as well as the **outcome** in terms of texts agreed. The **processes** through which the organisations obtained mandates, support and approval from their member organisations in the negotiation process are also considered.

The **involvement of social partners' members in national-level collective bargaining** is also important, as it shows that they are able to obtain a mandate to negotiate on behalf of their members (at least at national level, which could then also translate to a mandate to negotiate at EU level).

Such a mandate, whether implicit or explicit, allows for negotiations to take place at European level, which could potentially result in agreements that can be implemented as autonomous agreements, requiring implementation by social partners at EU and national levels in line with their respective practices and traditions, or as EU law through a Council Directive in line with Article 155 of the TFEU. The capacity to act autonomously in this way is an important contribution to the effectiveness of the ESSDC, as indicated in the communication on strengthening social dialogue in the European Union (COM(2023)40 final). Social partners are indeed encouraged to negotiate and conclude collective agreements on matters relevant to them, while safeguarding their autonomy and the right to collective action.

The involvement in collective bargaining of national sector-related trade unions and employer organisations is also a factor that distinguishes them from professional associations and business associations, which only defend their members' interests through unilateral lobbying activities and do not involve themselves in negotiations on working conditions through collective bargaining or social dialogue. Trade unions and employer organisations that do engage in collective bargaining on behalf of their members have a proven capacity to obtain a mandate from their members to negotiate and to make compromises and agreements with organisations representing different interests. In its analysis, this report aims to distinguish between these different types of organisations.

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

0.4. Data collection and quality control measures

Representativeness studies combine top-down and bottom-up approaches. The top-down approach aimed to identify all sector-related affiliates of the European associations listed in Table 4. These are the European social partner organisations currently involved in the ESSDC for the extractive industries sector.

Table 4: Organisations represented in the extractive industries ESSDC

<table>
<tr><th>Representing employers</th><th>Representing employees</th></tr>
<tr><td>Euracoal</td><td rowspan="5">IndustriAll Europe</td></tr>
<tr><td>Euromines</td></tr>
<tr><td>IMA-Europe</td></tr>
<tr><td>Aggregates Europe – UEPG</td></tr>
<tr><td>APEP</td></tr>
</table>

The bottom-up approach targeted other organisations involved in collective bargaining related to the extractive industries sector and sought to identify their membership in other European-level organisations.

Unless cited otherwise, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates are provided rather than leaving a question unanswered.

Thus, most quantitative data stem from four sources, namely:

- official statistics and representative surveys
- administrative data, such as membership figures provided by the respective organisations (for example, to calculate the density rates)
- estimates, expert opinions and assessments made by the Network of Eurofound Correspondents or representatives of the respective organisations
- studies on the sector[5]

Other sources include data and reports published by the European organisations listed above and their respective members, the social dialogue texts database and data from Eurostat (mainly the Structural Business Statistics (SBS) and the EU Labour Force Survey (EU-LFS)). A complete list of sources can be found in the References.

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study. An online kick-off meeting was held on 21 January 2021 with all EU social partner organisations from the extractive industries sector.

First, combining the top-down approach with the bottom-up approach, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the national reports prepared by the Network of Eurofound Correspondents between May and July 2021. Subsequently, Eurofound research managers and the authors of this report checked the consistency and completeness of the national contributions between August and September 2021 and, if necessary, asked the Network of Eurofound Correspondents to revise these between October and November 2021. Based on all the data gathered, interim findings were shared with European social partners between July and September 2022. Together with the comments on these interim findings, an overview report was drafted in the second half of 2022.

Draft versions of the overview report were shared in March 2024 with IndustriAll Europe, Euracoal, Euromines, IMA-Europe, Aggregates Europe – UEPG, APEP and the European Commission. As different social partner organisations were able to view the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information from other organisations representing a similar membership, this process involved an element of mutual control and recognition.

The final report, taking into account all comments provided, was evaluated and approved in June 2024 by written procedure of the Eurofound Industrial Relations Advisory Committee – which consists of representatives of both sides of industry, governments and the European Commission – in the presence of the European-level sectoral social partners identified in the report. To allow for a

[5] For more information see Eurostat (2019).

discussion between the social partners, an online discussion was organised in the period of the written evaluation procedure, to which delegates from the European social partner organisations from the sector and the members of the Eurofound Industrial Relations Advisory Committee were invited. To facilitate this, an informal online discussion opportunity was organised on 26 June 2024.

After the formal evaluation, the report was edited and prepared for publication in November 2024.

0.5. Structure of the report

The report consists of four other chapters. Chapter 1 gives a brief summary of the economic background and specificities of the extractive industries sector. Chapter 2 provides an analysis of the relevant social partner organisations in the EU27. Chapter 3 assesses the representative associations at European level. In the final chapter, conclusions are drawn based on the findings presented in the previous chapters.

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

1. Economic background and employment trends

This chapter provides the reader with a brief introduction to key trends in the extractive industries sector. It also describes the economic background of the extractive industries sector in terms of employment and company structures. It aims to outline the scope of the workforce and the companies in the sector that are to be represented by the trade unions and employer organisations detailed in the following chapter.

The extractive industries sector, as defined for the purpose of this study, covers the activities gathered by NACE codes 5, 7, 8 and 9 in Revision 2 of the Statistical Classification of Economic Activities in the European Community.[6] Within the extractive industries sector, the following activities will be distinguished, for the purpose of the assessment of the sector-relatedness of the trade unions and employer organisations included in this study:

- mining of hard coal and lignite (brown coal)
- mining of metal minerals (including mining of iron ores and non-ferrous metal ores, such as copper, lead, zinc, tin, bauxite, magnesium, chrome, nickel and cobalt)
- mining of construction minerals (including quarrying of stone and crushed rocks, and extraction of sand and gravel for aggregates)
- processing of aggregates obtained from recycling or through demolition
- quarrying of lime
- mining and quarrying of industrial minerals (including bentonite, diatomite, borates, feldspar, silica, calcium carbonate, kaolin, plastic clay, talc, sepiolite, vermiculite and mica)
- quarrying of ornamental stone and natural stone
- mining of fertilisers and potassium
- extraction of peat
- extraction of salt
- support activities for other mining and quarrying

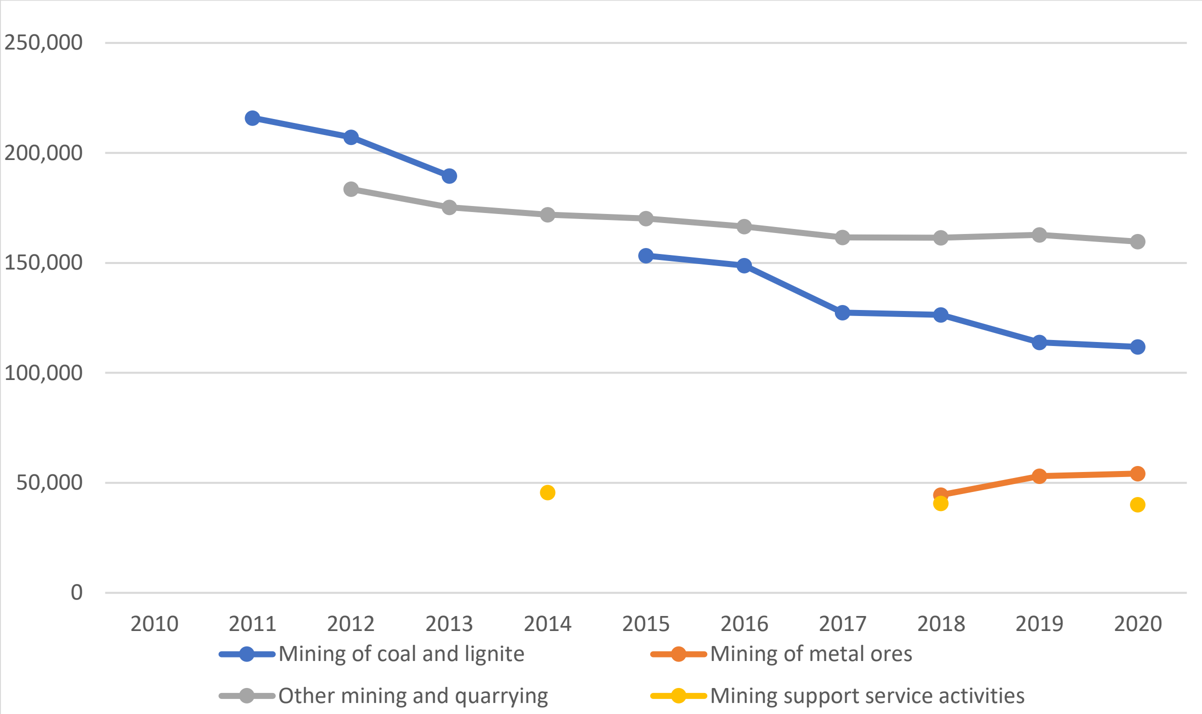
1.1. Extractive industries – History and current trends

The extractive industries constitute an economic sector with a long history. Extractive industries have been one of the driving forces for the economic growth of Europe. Today, the highly technologised extractive industries sector plays a central role in the EU economy, as it provides minerals and metals for a wide range of sectors. As this chapter illustrates, the sector has undergone fundamental changes during the past few decades and will continue to do so as the EU and the Member States take steps towards decarbonisation.

Figure 2 illustrates that the mining of coal and lignite used to be the part of the sector with the largest part of the employment until 2013, but that since 2014 the other mining and quarrying activities have taken on the largest share of employment. In 2020, based on Eurostat's Structural Business Statistics (SBS), the extractive industry employed 365,842 employees, including 159,687 (44%) in other mining and quarrying, indicated in grey in the figure, and 111,829 (31%) in mining of coal and lignite, indicated in blue in the figure. In the mining of metal ores, there were 54,220 employees (15%) and 40,106 employees (11%) in mining support services activities in 2020.

[6] The data collection for this study was conducted using the applicable NACE codes at the time (2021).

Figure 2: Development of share of employees by NACE, EU27, 2021



Note: *Some data are not available and/or are confidential.*

Source: *Eurostat SBS, 2020*

Table 5 illustrates the four countries in which a major part of the employment is in the mining of coal and lignite; the largest proportion, about 70%, is in Poland, followed by Czechia with 61%, Bulgaria with 44% and Germany with 27% of the sectoral employment (see also Figure 5). These four Member States are also those with the largest proportions of the total sectoral employment. A total of 36% of the entire extractive industries EU sectoral workforce is employed in Poland. Similarly, 14% is employed in Germany, 6.5% in Bulgaria and 6% in Czechia (see Table 6).

Table 5: Relative importance of different mining activities in the different EU Member States

Specific extractive industry activities	Member States where these activities were most important in 2020
Mining of coal and lignite	BG, CZ, DE, PL
Other mining and quarrying	AT, FR, IT (for the Member States with more than 5,000 employees in the sector)
	BE, EE, HR, HU, IE, LT, LV, SE, SK (Member States with more than 1,000 employees in the sector)
Mining of metal ores	BG, EL, ES, FI, PT, RO
Mining support services activities	DK, NL, RO

1.1.1. Extractive industries as a driver for integration and economic growth of Europe

The extractive industries, and in particular the coal industry, have had a central role in the integration of Europe. In 1952, Belgium, France, Italy, Luxembourg, the Netherlands and West Germany ratified a treaty that established **the European Coal and Steel Community (ECSC)** – a common market for coal and steel. The ECSC Treaty is considered to be the first stone of the EU's integration history as we know it today.

The aim of the ECSC was to contribute to economic expansion, employment and improvement of living standards through creating free movement of coal and steel without duties and taxes. In post-Second World War Europe, the ECSC had also a major role in building a better relationship between France and Germany and avoiding future Franco-German conflicts (Britannica, 2016).

Later on, the ECSC expanded to include all members of the European Economic Community and the European Union. The ECSC was dissolved in 2002 when the treaty expired (EUR-Lex, 2017).

1.1.2. Extractive industries' central role in resource security

The transition to a low-carbon economy is high on the agenda at both EU and Member State levels. The aim of the **European Green Deal** is to transform the EU into a resource-efficient economy and make the EU a leading player in the global response to climate change. The central targets of the European Green Deal are 1) no net emissions of greenhouse gases by 2050, 2) economic growth decoupled from resource use and 3) ensuring a transition that leaves no person or place behind (European Commission, 2020a).

The extractive industries have a significant and complex role in this transition to a low-carbon economy. Firstly, **the future of the mining of coal and lignite** is fundamental for this shift, as a significant proportion of the EU's emissions comes from coal. While the role of coal in production has decreased significantly over recent years, approximately 17% of electricity in the EU is still produced using hard coal and lignite (Euracoal, 2023).[7] Due to the importance of the coal sector's value chain in the EU economy and in EU societies, the transition must be done in a manner that ensures that the current coal-dependent regions and people working in the coal industry are given adequate support. At EU level, several funds and tools are available to support this shift, often referred to as **'just transition'** (European Commission, 2018). One central tool in this process is the **Just Transition Mechanism**, aimed at playing a key role in alleviating the socioeconomic impact of the transition by providing targeted financial support from 2021 to 2027 (European Commission, undated-b).

Secondly, the extractive industries have a significant role in **contributing to the transition to renewable energy**. Since clean energy technologies such as solar plants, wind farms and electric vehicles require more minerals, the transition to renewable energy will lead to a significant increase in the demand for minerals. The energy sector has traditionally represented a small part of the total demand for minerals. According to the International Energy Agency, in a scenario that meets the Paris Agreement goals, the energy sector's proportion of the global demand for copper and rare elements

[7] Ongoing restructuring over several decades with an enormous loss of jobs and even the closing down of mining in several countries is not comparable to any other industrial development and has resulted in a very special agenda in the social dialogue for the mining sector (Reibsch, 2005, p. 364).

will grow to over 40% within two decades, the sector's share of the demand for nickel and cobalt will grow to 60–70% and its share of the demand for lithium will grow to almost 90% (IEA, 2021).

European social partner organisations have contributed constructively to this strategic field of EU policymaking, as is illustrated in Box 1.

Box 1: Extractive industries sector European social partners' contributions to just transition and industrial policymaking related to the Green Deal and decarbonisation

- *IndustriAll Europe conducted an inquiry and work in the field on the just transition, with some outputs on a dedicated web page here. The Just Transition Manifesto is an overarching policy document, and the section dedicated to the ongoing actions (such as territorial just transition plans or national social partners' actions) can be linked to the extractive industries sector under the item 'raw materials' (here). IndustriAll Europe's position on the EU Green Deal Industrial Plan is available here.*
- *Euromines issued a position in April 2020 on the 2030 Climate Target Plan (here). Additionally, there are documents devoted to the Carbon Border Adjustment Mechanism issued in October 2020 (here), the importance of Critical Raw Material resources (here), the Emission Trading System (here) and the Green Deal Industrial Plan (here).*
- *Euracoal developed a huge set of position papers; one can find all them here. Many documents are about European Commission proposals on industrial emissions, on the EU Zero-Pollution Action Plan and above all on the Fit for 55 package, as can be noted under 2021. One key document is the Response to Public Consultation on the proposal for a regulation to establish the Just Transition Fund (March 2020, here).*
- *In 2021, APEP adopted a position paper on the European Green Deal, with a specific angle on the importance of potassium chloride as a mineral fertiliser for agriculture, the production of food and the nourishment of the population (here).*
- *Aggregates Europe – UEPG adopted in April 2022 a position on 'a green and secure Europe' (here), strictly linked to the standing policy towards raw materials. The overall list of position papers from this social partner can be found here.*
- *IMA-Europe adopted a minor set of positions, more focused on the decarbonisation of process industries, following the project 'Processes 4 Planet' (here), on the sustainability of investments (here), on the circular economy (a strong study is here) and on biodiversity (here).*

Due to increasing global competition for raw materials and the high risk of global supply chain disruptions (such as those demonstrated by the COVID-19 crisis), securing supply of critical materials is high on the agenda of the EU and the Member States. In 2020, the European Commission presented an Action Plan on Critical Materials. Mobilising the Member States' potential is an essential strategy for increasing the EU's resilience. Furthermore, as many of the raw materials for batteries lie in EU regions currently dependent on coal- or carbon-intensive industries, new economic activity in these regions could support just transition in the EU (European Commission, 2020b).

At the same time, the ecological footprint of mining and quarrying is significant. Reducing dependency on primary materials through circular use of resources, better design and innovation is thus a central goal for the EU. In 2020, the European Commission adopted a new Circular Economy Action Plan (CEAP), which seeks to reduce pressure on natural resources and create sustainable growth and jobs (European Commission, 2020c). This acts as a driver for new innovations and priorities in the European extractive industries sector.

In sum, the extractive industries sector in Europe has undergone a series of fundamental changes during the past few decades. The central role of these industries in the decarbonisation of the EU entails that the speed and scope of these changes is likely to only increase. This has a significant impact on the companies and workers in this sector.

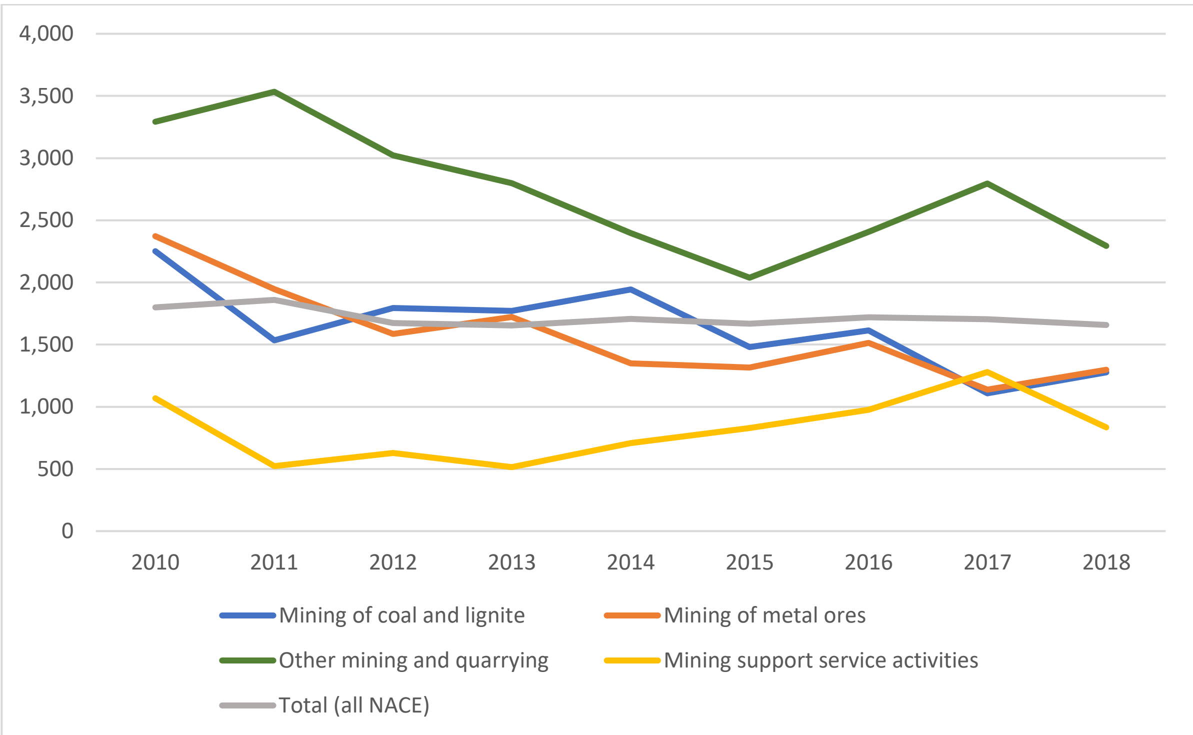
1.1.3. Occupational safety

The extractive industries sector is considered to entail elevated risks for workers' health, with risk factors including moving vehicles, manual handling and musculoskeletal injuries, falls from heights, rockfall and collapse of sides, vibration, noise, dust and the use of explosives (Elgstrand and Vingård, 2013).

Both the EU and the Member States have taken several steps to prevent accidents and minimise risks. An example of a measure at EU level is Council Directive 92/104/EC, on safety and health protection of workers in surface and underground mineral-extracting industries. This directive entered into force in 1992 and lays down minimum requirements for the safety and health protection of workers in mineral-extracting industries. In 1998, Council Directive 98/24/EC entered into force, further establishing measures to protect workers from risks of exposure to hazardous chemicals.

As Figure 3 illustrates, the frequency of accidents in the extractive industries sector has decreased since 2010. The regulative frameworks at EU and Member State levels, automatisation and technological advancements in the extractive industries are some of the factors seemingly contributing to this positive trend.

Figure 3: Non-fatal accidents – Incidence rate in the extractive industries sector, 2010–2018



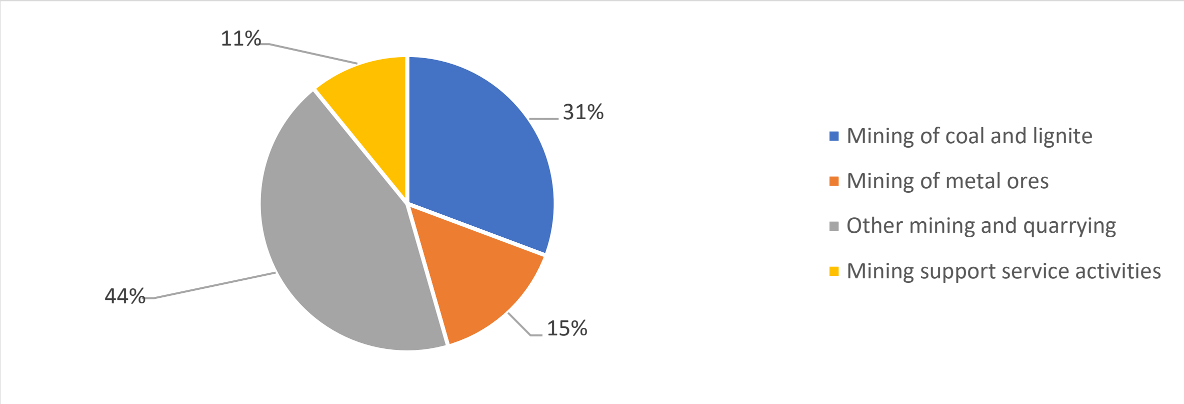
Source: *Eurostat, non-fatal accidents at work [HSW_N2_01]*

1.2. Employment in the extractive industries sector

In this subsection, the workforce of the extractive industries sector is presented. The largest proportion of the sectoral workforce is employed in NACE 8, other mining and quarrying (44%), followed by mining of coal and lignite (31%). Some 15% of the sectoral workforce were employed in the mining of metal ores and 11% were employed in mining support activities. The percentages above relate to SBS data for 2020 presented in Section 1.1, in Figure 2 and in the text above Figure 2. The total number for that data gives 365,482 employees in the extractive industries sector. This is illustrated in Figure 4.

Table 6 shows the SBS data with the numbers of employees for the 27 EU Member States, giving a total of 335,295 employees in the sector.[8] This corresponds to 0.26% of the total number of persons employed in the EU27.

Figure 4: Share of employees by NACE, EU27, 2020



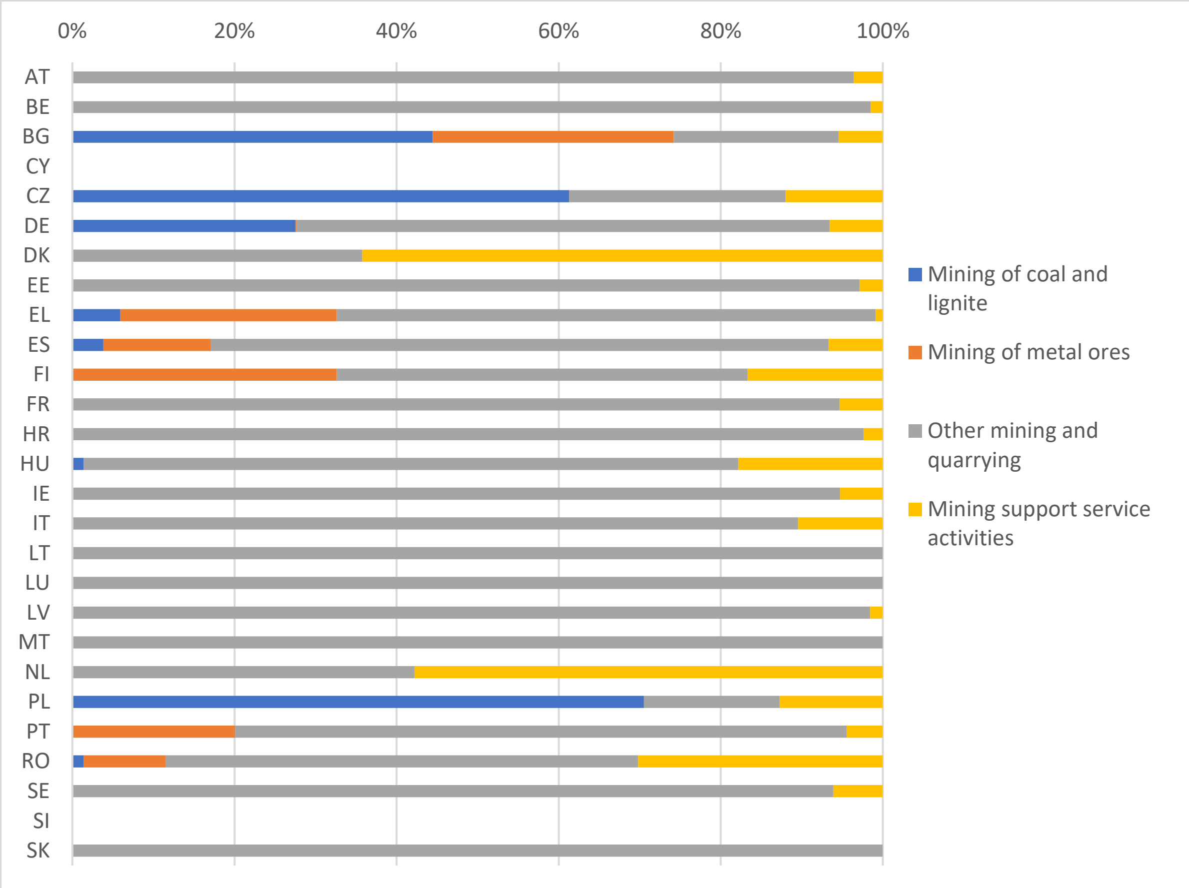
Source: *Eurostat SBS, 2020*

As illustrated in Figure 5, there is significant variation at country level in the distribution of employment between the different subsectors of the extractive industries. The data available indicate that, in most countries, most of the sectoral workforce is in other mining and quarrying (NACE 8).

Poland, Czechia and Bulgaria stand out in this figure, as large parts of their sectoral workforces are in mining of coal and lignite (NACE 5). However, the data should be interpreted carefully, as there are significant gaps. For instance, employment data for the subsector of mining of metal ores (NACE 7) are missing for Sweden, despite that being a sector with a large national workforce. Also, little is known about the distribution of employees between construction minerals and industrial minerals on a more granular level.

[8] Breaking down the 335,295 employees presented in Table 6 gives different percentages to those included in Figure 2 and in the text above Figure 2, where the total number of employees in the sector is given as 365,842. These differences arise from missing data for certain countries in some of the NACE 3 digit sub-sectors.

Figure 5: Shares of sector employment in different parts of the sector (NACE codes) by Member State, 2020



Source: *Eurostat SBS, 2020*

Table 6 presents the workforce in the Member States for mining of coal and lignite (NACE 5), mining of metal ores (NACE 7), other mining and quarrying (NACE 8) and support activities for other mining and quarrying (NACE 9.9). Poland has the highest number of employees in the sector, with just under 120,000 workers, followed by Germany (approximately 47,000) and Bulgaria (approximately 22,000). These countries employ more than half of the sectoral workforce in the EU. When looking at the significance of the sector across the workforces of the Member States, Poland ranks the highest, with 1.20% of the national workforce employed in the sector, followed by Bulgaria (1.14%) and Czechia (0.55%).

Poland and Germany together employ half of the EU sectoral workforce. With the addition of Bulgaria, Czechia, Romania, Spain, Italy, France and Portugal, 85% of the EU extractive industries sectoral workforce is employed in nine Member States.

Table 6: Employment in the extractive industries sector, ranked by size of sector workforce, 2020

Member State	Persons employed in the extractive industries (NACE 5, 7, 8, 9)	Total employment (all NACE codes)	Share (%) of total national employment (NACE 5, 7, 8, 9)	Share (%) of total EU sector-related employment
PL	119,838	9,996,913	1.20	35.7
DE	47,306	29,430,780	0.16	14.1
BG	21,864	1,917,171	1.14	6.5

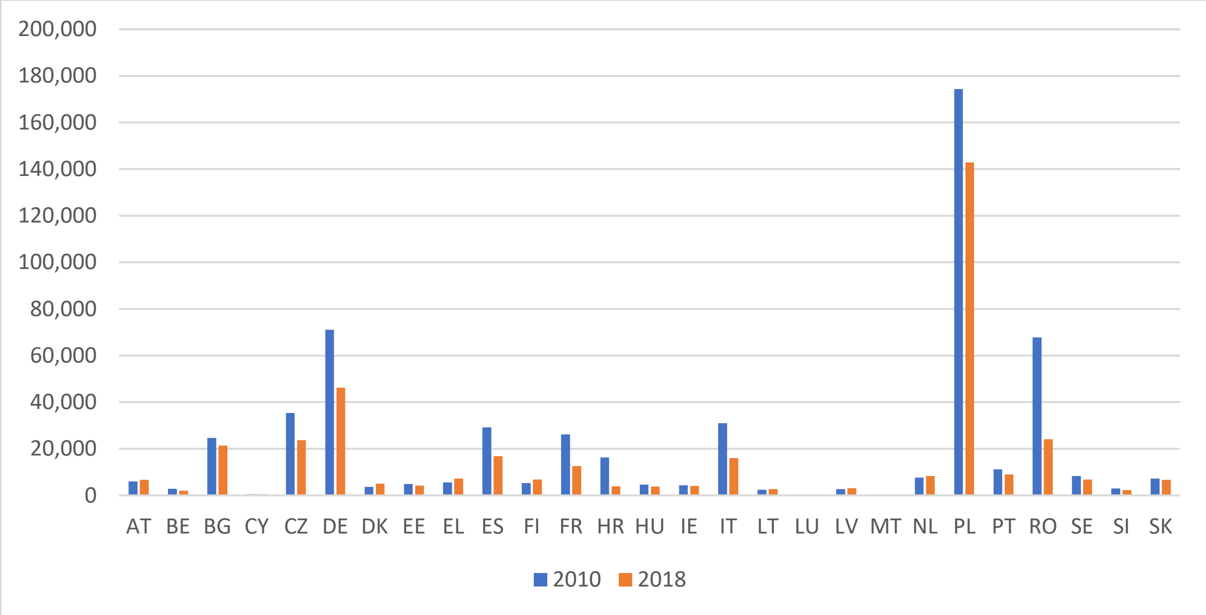
Member State	Persons employed in the extractive industries (NACE 5, 7, 8, 9)	Total employment (all NACE codes)	Share (%) of total national employment (NACE 5, 7, 8, 9)	Share (%) of total EU sector-related employment
CZ	20,310	3,710,274	0.55	6.1
RO	19,106	3,990,005	0.48	5.7
ES	17,625	12,510,252	0.14	5.3
IT	15,135	14,914,494	0.10	4.5
FR	14,359	16,235,541	0.09	4.3
PT	9,639	3,482,918	0.28	2.9
FI	7,361	1,528,820	0.48	2.2
NL	5,620	5,967,001	0.09	1.7
AT	5,380	2,906,994	0.19	1.6
EL	5,326	2,510,330	0.21	1.6
HU	3,865	2,859,842	0.14	1.2
LV	3,371	619,111	0.54	1.0
DK	2,954	1,769,373	0.17	0.9
SK	2,765	1,604,048	0.17	0.8
LT	2,571	1,019,971	0.25	0.8
BE	2,443	2,949,203	0.08	0.7
SE*	2,308	3,236,026	0.07	0.7
IE	2,180	1,531,349	0.14	0.7
HR	1,951	1,087,397	0.18	0.6
EE	1,603	436,161	0.37	0.5
LU	265	324,266	0.08	0.1
MT	150	167,710	0.09	0.0
CY**	0	275,011	0.00	0.0
SI**	0	666,653	0.00	0.0
EU27	**335,295**	**127,647,614**	**0.26**	**100**

Notes: *The table is organised by the absolute number of sector employees in the Member States. * Data for Sweden are likely to be significantly higher as data for the subsector mining of metal ores are missing, a sector with large workforce in Sweden. ** The countries have no employees in the sector according to Eurostat data. The latest year for registered employees in the sector for Cyprus was in 2010 (around 600) and in 2013 for Slovenia (around 1,000). However, as both countries have trade unions and employer organisations stating that they are active in the sector, this is probably a matter of insufficient employment data. In summary, we cannot currently estimate the size of the sector in Cyprus and Slovenia.*

Source: *Authors' calculations, based on Eurostat SBS, 2020*

From the available data, it is clear that the size of the workforce in this sector decreased significantly between 2010 and 2018 (see Figure 6). Among the countries with the largest numbers of employees, the decrease was 35% in Germany and 18% in Poland. In Romania, the number of employees decreased by 64%. This results mainly from policies to phase out coal mining in Germany (see Oei et al, 2019) and Poland (see Śniegocki et al, 2022) and, overall, from just transition policies (see Eurofound, undated).

Figure 6: Number of employees in the extractive industries sector in 2010 and 2018



Note: *Data are missing for Estonia (2010), Greece (2010), Ireland (2018) and Slovenia (2010, 2018).*

Source: *Eurostat SBS, 2020*

1.3. Workforce characteristics

Data collected from the Network of Eurofound Correspondents indicate that standard employment practices are the most common in the sector, with **open-ended contracts dominating** most parts of the sector. Data on forms of employment were not available for all countries, but, for instance, in Portugal the share of employees with an open-ended work contract in this sector was 75%. In France, this number was 95%. Peat extraction stands out as an outlier, as a significant proportion of the sectorial workforce is seasonal and thus has fixed-term contracts as standard practice.

The available data indicate that **the number of part-time employees in this sector is low**. For instance, in Denmark, the number of employees with a part-time contract was 10%, with 90% working full time.

The number of self-employed workers in this sector is low. Data from Eurostat are not available at two- or three-digit level. Data covering the entire manufacturing sector (including NACE 6) indicate that in 2019 the number of self-employed workers was 9,100 in the EU27 (Eurostat [lfsa_esgan2]). The proportion of self-employed workers of the total workforce in the extractive industries sector is thus likely to be under 5%. The available data from the Member State level support this. For instance, the proportion of self-employed workers in the extractives industries in Austria is only 3%.

The extractive industries sector is **a male-dominant sector**. In France, women make up only 13% of the sector workforce, and only 11% in Croatia.

Estimates or statistical data on the proportions of **white-collar workers** and **blue-collar workers** are not available for each Member State. However, the estimates provided by the Network of Eurofound Correspondents indicate that 70–80% of the workforce in EU are blue-collar workers and 20–30% are white-collar workers.

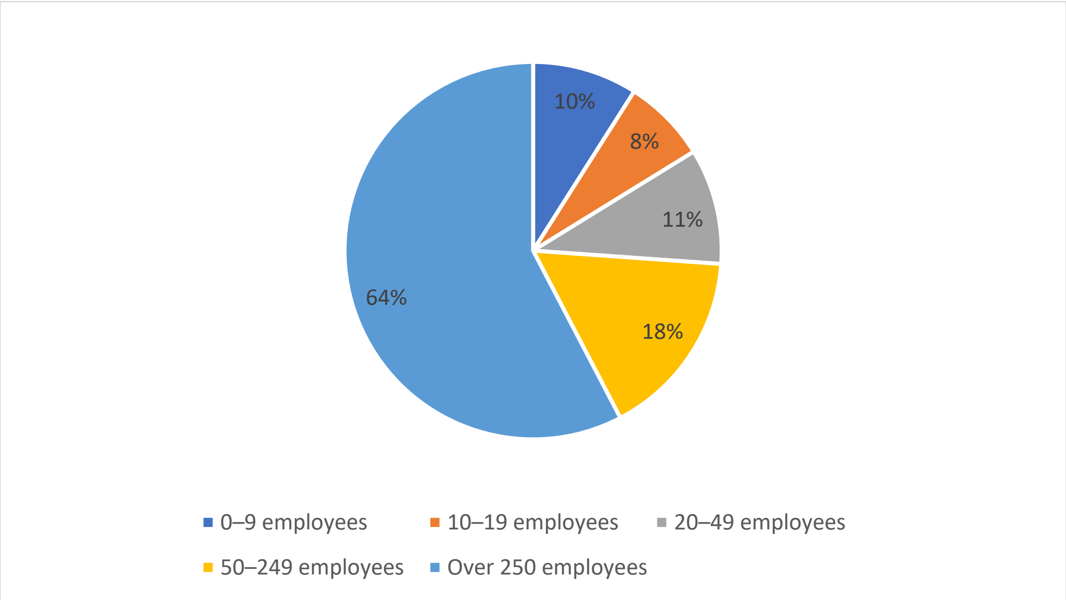
Data collected from the Network of Eurofound Correspondents indicate that **the estimated proportion of management staff** is around 5% of the workforce. The available data vary between 1.3% (Spain) and 15% (Czechia).

These characteristics are factors that seemingly make it easier for trade unions to organise the sector. The available data on unionisation rates support this notion. At least in Austria, Czechia, Finland, Greece, Slovakia, Slovenia and Sweden, the unionisation rate exceeds 60%. For more information, see Section 2.

1.4. Characteristics of extractive industries employers

The companies in the extractive industries sector can be broken down into five groups, as illustrated in Figure 7. First, there are the largest employers in each country, with a workforce of more than 250 employees. Companies of this size employ around 64% of all employees working in this sector in the EU. Companies with between 50 and 249 employees provide employment for around 18% of all workers, followed by companies employing between 20 and 49 workers (11%). The smallest companies employ 8% in the size class of between 10 and 19 employees and 10% in the size class of between 0 and 9 employees.

Figure 7: Share of the sector-level workforce in the EU by company size, 2018



Source: *Authors' calculations, based on Eurostat SBS, 2018*

Table 7 illustrates the size of the largest sector employers in the Member States. As the table indicates, 1,000–2,499 employees is the most common size class for the largest employers. Some 24% of the largest employers are of this size. However, there is significant dispersion in the size of the largest employers: in certain countries the largest employers provide work for only under 50 or 50–99 employees (Estonia, Croatia, Malta) whereas in other countries the largest employers provide work for more than 5,000 employees (Germany, Poland), in line with the total sector workforce of each country.

Table 7: Workforce size of the two largest employers in the extractive industries sector in the country

Member State	<50	50–99	100–249	250–499	500–999	1,000–2,499	2,500–4,999	≥5,000
AT								
BE								
BG								
CY								
CZ								
DE								
DK								
EE								
EL								
ES								
FI								
FR								
HR								
HU								
IE								
IT								
LT								
LU								
LV								
MT								
NL								
PL								
PT								
RO								
SE								
SI								
SK								
N = 50	2%	14%	8%	12%	12%	24%	10%	12%

Notes*: No data are available for Italy. For Cyprus, Greece and Luxembourg, only one employer was listed by the national correspondent. Light grey = one of the two largest companies in that size category. Dark grey = both of the two largest companies in that size category.*

Source: *Network of Eurofound Correspondents, 2021*

Two Polish companies (both holding groups), PGG and KGHM Polska Miedź, are the two largest employers in the extractive industries sector in the EU. PGG employs 40,000 workers and KGHM Polska Miedź employs 20,000 workers. The former is active in mining of coal and lignite (NACE 5) whereas the latter is active in mining of metal ores (NACE 7). RWE Power and K&S, both German, rank third and fourth with 9,700 and 9,000 employees, respectively. RWE Power is active in the mining of coal and lignite (NACE 5), and K&S is engaged in the mining of construction minerals (NACE 8). The other two extractive industry companies with more than 5,000 employees are Mini Maritsa Iztok EAD from Bulgaria, with about 7,265 employees in mining coal and lignite (NACE 5), and Fugro N.V. from the Netherlands, with 8,485 employees in mining support services activities (NACE 9). Of the six companies with more than 5,000 employees in the sector, three are in the mining of coal and lignite (NACE 5), one in the mining of metal ores (NACE 7), one in the mining of construction minerals (NACE 8) and one in mining support services (NACE 9).

As Table 8 illustrates, in many Member States, the number of employees of the two largest companies in the extractive industries constitutes a significant proportion of the sectoral workforce at national level.

Table 8: Share of employees of the two largest companies in the extractive industries as a percentage of total number of employees in the sector

Proportion of the sectoral workforce employed in two largest companies in sector	Member State
No information available	CY, IE, LT, IT, MT
0–10%	ES, HR
11–20%	DK, EE, FI, HU, PT
21–30%	CZ, EL, FR, LV, RO
31–40%	AT, BE, BG
41–50%	DE, PL
>50%	LU, NL, SE, SI, SK

Note: *Data refer to entire sector as defined for the purpose of this study.*

Sources: *Authors' calculations, based on data from the Network of Eurofound Correspondents, 2021; and Eurostat SBS, 2018*

Dividing the numbers of employees by the number of companies gives an average number of employees per company. In many Member States, the average number is between 10 and 19 employees.

Table 9: Average number of employees per company in Member States, 2018

Average number of employees per company	Member State
0–9	SE, DK, IT, FI, HR, PT, ES
10–19	EE, EL, HU, LV, FR, SK, RO, NL, BE, AT
20–49	LT, DE, LU, CZ, SI
50–249	PL, BG
Over 250	

Note: *No data are available for Cyprus, Ireland and Malta.*

Source: *Authors' calculations, based on Eurostat SBS, 2018*

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the extractive industries sector. This study has identified 74 sector-related trade unions in the EU27 and 75 sector-related employer organisations and 3 business associations in the EU27. All but three countries (Estonia, Latvia and Malta) have at least one sector-related trade union, although the number of organisations varies from one to seven (Table 10).

In both Estonia and Latvia there is a trade union affiliated to IndustriAll Europe, but neither of them has members in the extractive industries sector. For Latvia, where there are 3,371 employees in the sector, the affiliated union is the Latvian Industrial Workers Trade Union. For Estonia, where there are 1,603 employees in the sector, it is the Estonian Industrial and Metal Workers Trade Union (IMTAL). In Malta there are only 150 employees in the sector.

Table 10: Number of trade unions and employer organisations in the extractive industries sector

Number of trade unions or professional associations in the extractive industries sector in the Member State	Member State	Number of employer organisations or business associations in the extractive industries sector in the Member State
3	AT	3
4	BE	7
2	BG	1
3	CY	2
3	CZ	3
2	DE	8
2	DK	2
0	EE	2
3	EL	1
5	ES	11
7	FI	6
5	FR	3
2	HR	1
1	HU	1
3	IE	1
3	IT	2
1	LT*	2
2	LU	0
0	LV	2
0	MT	1
2	NL	1
6	PL	5
4	PT	2
3	RO	2
4	SE	3
3	SI	3
1	SK	3
74	EU27	**75 + 3**

Notes: *The orange marked organisations are business associations that do not qualify as employer organisations. Marked in green are the 75 employer organisations that are recognised employer organisations.*
** For Lithuania there is the Association of Lithuanian Quarries and the Lithuanian Peat Producers Association (LD). They are business associations, which do not qualify as employer organisations (see Table 20).*
Source: *Network of Eurofound Correspondents, 2021*

There are 75 employer organisations and 3 business associations.

Sector-related employer organisations exist in 25 Member States (only Lithuania and Luxembourg have none). Luxembourg has only 265 employees in the sector. For Lithuania, there are two business associations, which are not considered employer organisations.

The average number of organisations per country is three, both for the trade unions and for the employer organisations. This is marked in blue in the final row of Table 10.

The largest numbers of sectoral trade unions are found in Finland (7) and Poland (6). The largest numbers of sectoral employer organisations are found in Spain (11), Germany (8) and Belgium (7).

2.1. Extractive industries sector trade unions

Of the 74 trade unions active in the sector, only 5 (7%) organise workers in all parts of the sector (as defined in this study). In fact, the type of sector coverage is very diverse among the trade unions, with some only covering workers in a very specific part of the sector, while a fair few cover large parts of the sector. This is most likely a reflection of the types of extractive industries that exist in the countries, rather than large parts of the sector workforce being uncovered by trade unions. More detailed breakdowns of trade union representation in the sector by NACE code and sectoral occupational categories are shown in Tables 11–13.

Table 11: Trade unions by type of sector coverage

	Subsector											
	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other
Number of trade unions covering the subsector	27	38	40	47	34	38	43	38	28	19	19	32
Share (%) of all sector trade unions the covering subsector	36	51	54	64	46	51	58	51	38	26	26	43

Source: *Network of Eurofound Correspondents, 2021*

Table 12: Width of trade union coverage (number and %)

Number of subsectors covered	0	1	2	3	4	5	6	7	8	9	10	11	12
Number of trade unions	2	9	10	3	5	7	7	8	11	4	4	3	5
% of trade unions	3	12	14	4	7	9	9	11	15	5	5	4	7

Source: *Network of Eurofound Correspondents, 2021*

Table 13: Sector coverage of trade unions

Member State	Trade union	Parts of the sector covered												Involvement in collective bargaining		IndustriAll Europe member
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	
AT	GBH			■	■		■	■	■		■		■	■		
	PRO-GE	■	■	■			■	■	■	■		■	■	■		■
	GPA	■	■	■	■	■	■	■	■	■	■	■	■	■		■
BE	ABVV-FGTB ACCG			■	■	■	■	■	■	■	■	■	■	■	■	■
	ACV-CSC BIE			■	■	■	■	■	■	■	■	■	■	■	■	■
	CSC-CNE				■	■	■		■	■	■	■	■	■	■	■
	ACLVB-CGSLB				■	■	■	■	■	■	■	■	■	■	■	■
BG	Syndical Miners Federation ‘Podkrepa’	■	■	■	■			■						■	■	■
	CITUB-FNSM-miners	■	■	■	■			■					■	■	■	■
CY	Oikodomoi-PEO		■	■	■	■	■	■	■				■	■	■	
	OOIM-SEK		■	■	■	■	■	■	■				■	■	■	
	DEOK		■		■				■				■		■	
CZ[9]	OS PHGN	■		■	■	■	■	■	■				■	■		
	OSEH	■		■										■	■	
	OS KOVO	■														■
DE	IG BCE	■	■			■	■	■	■	■	■	■	■	■	■	■
	IG BAU				■	■	■	■	■				■	■	■	
DK	CO-industri			■	■	■	■	■	■		■	■		■		■
	IDA			■	■					■						■
EE	*No trade union in the sector*															
EL	PanHellenic Energy Federation (PEF)															■
	OME	■	■			■		■		■			■	■		
	Ochmee	■	■	■	■	■	■	■	■	■	■	■	■	■		
	GFWECI				■	■								■		
ES	UGT-FICA	■	■	■	■	■	■	■	■	■				■	■	■
	CCOO Industria	■	■		■	■	■	■	■	■				■	■	■
	USO FI	■	■	■				■		■				■	■	■
	ELA Industria eta Eraikuntza	■	■	■	■	■		■		■					■	■
	CIG Industria	■		■	■		■	■	■	■				■	■	
FI	YTN[10]		■	■										■	■	
	TEK (affiliated to YTN)		■	■										■	■	■
	Insinööriliitto (affiliated to YTN)		■	■										■	■	■
	Teollisuusliitto		■											■		■
	Pro		■	■										■		■

[9] Two more Czech trade unions listed in Table 59 in Annex 1, OS Echo and OSSKP, are also both affiliated to IndustriAll Europe and appear to be involved in collective bargaining in other sectors that may marginally cover a small number of workers in the extractive industries sector. But, as both trade unions reported not having any members in the extractive industries sector and are therefore not sector-related trade unions, they have not been included in this table.

[10] YTN is the negotiating organisation; Insinööriliitto and TEK are members.

Member State	Trade union	Parts of the sector covered												Involvement in collective bargaining		IndustriAll Europe member
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	
	Rakennusliitto															
	Sähköliitto															
FR	CFE-CGC Energies															
FR	CFE-CGC Métallurgie – FCMTM															
FR	CFTC – Fédération Chimie, Mines, Textiles, Energie															
FR	Fédération CFE-CGC Enermine															
FR	Fédération nationale de l'Energie et des Mines CGT-FO															
FR	Fédération Nationale des Mines et de l'énergie – CGT															
FR	FGMM-CFDT															
FR	BA-TI-MAT CFTC															
FR	CFE-CGC BTP (SICMA)															
FR	FNCB-CFDT															
FR	FG-FO															
FR	FNSCBA-CGT															
HR	SGH															
HR	SING															
HU	BDSZ															
IE	SIPTU															
IE	Unite															
IE	Connect															
IT	Filctem CGIL															
IT	FEMCA CISL															
IT	Uiltec UIL															
LT	LBMAĮDPS															
LU	OGB-L															
LU	LCGB-Indusid															
LV	*No trade union in the sector*[11]															
MT	*No trade union in the sector*[12]															
NL	FNV															
NL	CNV[13]															
PL	SGiE NSZZ Solidarność															
PL	ZZG															

[11] The Latvian Industrial Workers Trade Union (LIA), listed in Table 59 in Annex 1, was checked for the scope of this study but appeared not to have any members in the extractive industries sector and has therefore not been included in this table.

[12] The General Workers Union (GWU), listed in Table 59 in Annex 1, was checked for the scope of this study but appeared not to have any members in the extractive industries sector and has therefore not been included in this table.

[13] CNV is likely to have members in the sector, but this has not been confirmed by the organisation.

Member State	Trade union	Parts of the sector covered: 5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Involvement in collective bargaining: Sector level	Company level	IndustriAll Europe member
	PZZ Kadra	■	■	■				■				■			■	■
	SPCh NSZZ Solidarność			■											■	■
	SBiPD NSZZ Solidarność				■		■								■	
	Budowlani				■		■								■	
PT	Fiequimetal[14]	■	■											■	■	■
PT	STIM (part of Fiequimetal)		■											■	■	■
PT	Feviccom			■	■	■	■		■					■	■	
PT	SIMA		■	■	■				■						■	■
PT	IndustriAll BNS (former FSLI Metal)															■
PT	FSGR (FS Gaz Romania)												■		■	■
PT	FNS Salroca											■	■		■	
PT	FNME	■	■									■			■	
SE	IF Metall		■	■	■	■	■	■	■	■	■		■	■	■	■
SE	SEF		■	■	■	■	■	■		■			■	■	■	■
SE	SI		■		■	■	■	■	■	■			■	■	■	■
SE	Unionen		■	■	■	■	■	■	■	■			■	■	■	■
SI	SPESS	■												■	■	
SI	SDRES	■												■	■	
SI	ZSSS-KNG				■	■	■	■	■	■		■	■	■		
SK	OZ PBGN	■	■	■				■						■	■	

Notes: *The red organisations are member organisations of IndustriAll Europe, participating in the ESSDC for the extractive industries sector. These organisations did not, however, provide information regarding their sector-relatedness to the Network of Eurofound Correspondents.*

Source: *Network of Eurofound Correspondents, 2021*

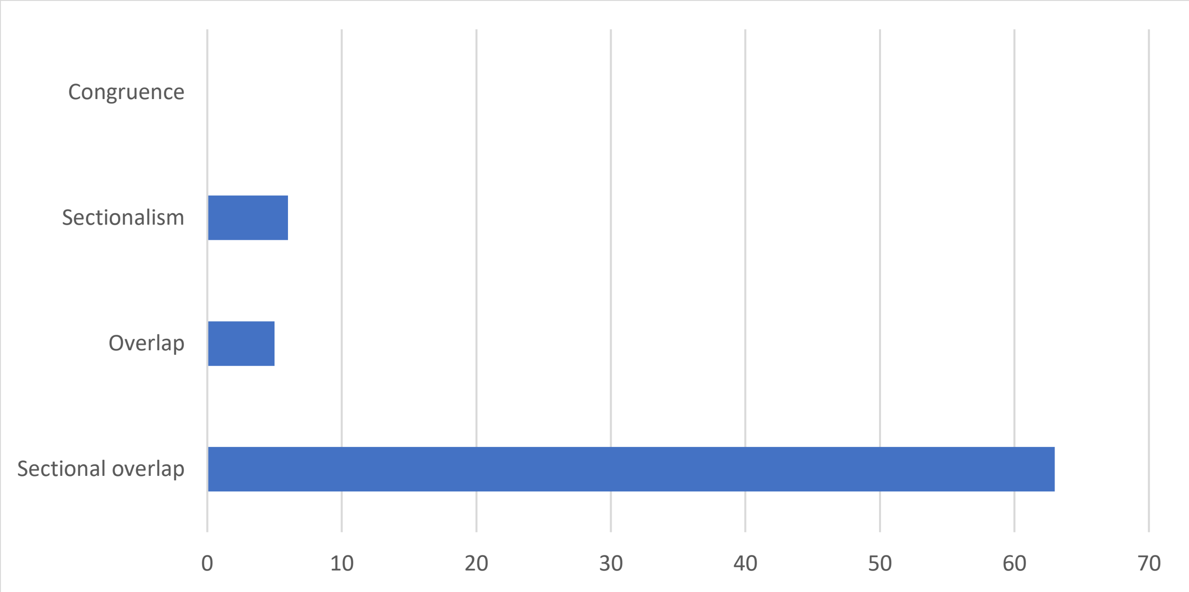
The sector-relatedness of the trade unions above has been assessed regarding whether their membership includes affiliates in the main parts of the sector in terms of economic activities. This means covering NACE codes 5 and 7–9, as well as the specific activities considered meaningful by European social partners for the assessment of their sector-relatedness (see Table 2 in Section 0.3).

Additional factors regarding the sector-relatedness of trade unions include whether all categories of employees (white- and blue-collar workers) are covered, whether employees in the larger and the smaller companies are covered and whether employees in all parts of the country can be part of the trade union. On the basis of these factors, an organisation is categorised as being congruent with the sector or as having an overlapping, sectional or sectionally overlapping membership domain. The overlapping domains indicate links with other sectors, while sectionalism might contribute to fragmentation (if different organisations cover different parts of the sector) or pluralism (if different organisations have similar membership) (see

[14] STIM is affiliated to Fiequimetal.

Table 3 and Figure 1 for definitions). The numbers of trade unions in the extractive industries sector that fall into the four categories of sector-relatedness are presented in Figure 8 and Table 14.

Figure 8: Membership domain of trade unions in the extractive industries sector (number)

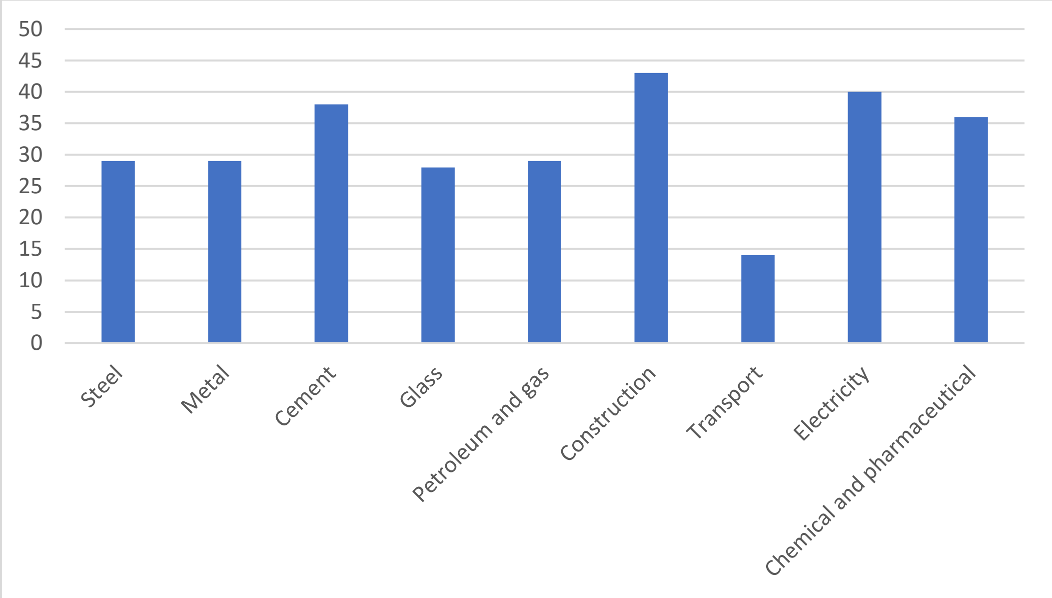


Source: *Network of Eurofound Correspondents, 2021*

The vast majority of trade unions in the sector, 63 out of 74, or 85%, have a sectionally overlapping membership domain, meaning that they cover workers in one or several parts of the extractive industries (but not the entire sector), while also covering workers in other sectors. A handful of trade unions have an overlapping domain (5 out of 74, or 7%) or a sectional domain (6 out of 74, or 8%). None of the trade unions have a congruent membership domain, or one that perfectly matches the definition of the sector used in this report. This is not surprising, as that would mean that all parts of the extractive industries sector exist as economic activities in a single Member State, which is uncommon. As there are no trade unions with a congruent membership domain, the few trade unions covering the entire extractive industries sector are only those with an overlapping domain (five in total).

Combining trade unions with overlapping membership domains and those with sectional overlap gives all the unions that have members in other sectors as well as the extractive industries sector. In total, 68 trade unions (92%) also have members in other sectors. The most common sector for overlapping trade unions to cover in addition to extractive industries is construction, but overlap is also common in electricity and cement production (see Figure 9).

Figure 9: Sector overlap – Other sectors covered by trade unions in extractive industries



Source: *Network of Eurofound Correspondents, 2021*

Table 14 shows the membership domain of each individual trade union in the extractive industries sector.

Table 14: Membership domain of trade unions in the extractive industries sector

Member State	Congruence	Sectionalism	Overlap	Sectional overlap
AT			GPA	GBH PRO-GE
BE				ABVV-FGTB ACCG ACV-CSC BIE CSC-CNE ACLVB-CGSLB
BG		Syndical Miners Federation 'Podkrepa' CITUB-FNSM-miners		
CY				Oikodomoi-PEO OOIM-SEK DEOK
CZ				OS PHGN OSEH OS KOVO
DE				IG BCE IG BAU
DK				CO-industri IDA
EE	No trade union in the sector			
EL		OME	Ochmee	GFWECI
ES				UGT-FICA CCOO Industria USO FI ELA Industria eta Eraikuntza CIG Industria

Member State	Congruence	Sectionalism	Overlap	Sectional overlap
FI				YTN (negotiating organisation; Insinööriliitto and TEK are members) TEK (affiliated to YTN) Insinööriliitto (affiliated to YTN) Teollisuusliitto Pro Rakennusliitto Sähköliitto
FR				BA-TI-MAT CFTC CFE-CGC BTP (SICMA) FNCB-CFDT FG-FO FNSCBA-CGT CFE-CGC Energies CFE-CGC Métallurgie – FCMTM CFTC – Fédération Chimie, Mines, Textiles, Energie Fédération CFE-CGC Enermine Fédération nationale de l'Energie et des Mines CGT-FO Fédération Nationale des Mines et de l'énergie – CGT FGMM-CFDT
HR				SGH SING
HU				BDSZ
IE				SIPTU Unite Connect
IT			Filctem CGIL FEMCA CISL Uiltec UIL	
LT				LBMAĮDPS
LU				OGB-L LCGB-Indusid
LV	No trade union in the sector			
MT	No trade union in the sector			
NL				FNV CNV
PL				SGiE NSZZ Solidarność ZZG PZZ Kadra SPCh NSZZ Solidarność

Member State	Congruence	Sectionalism	Overlap	Sectional overlap
				SBiPD NSZZ Solidarność Budowlani
PT		STIM (part of Fiequimetal)		Fiequimetal (STIM is affiliated to Fiequimetal) Feviccom SIMA
RO		FNS Salroca		FSGR FNME
SE				IF Metall SEF SI Unionen
SI		SDRES		SPESS ZSSS-KNG
SK				OZ PBGN

Source: *Network of Eurofound Correspondents, 2021*

The following assesses the membership strength (organisational density) of trade unions in the extractive industries sector. Table 15 shows the organisational density of those trade unions for which data are available. It should be stressed that these data need to be treated very carefully. This is due to two main problems. First, several unions do not provide the information required to calculate density, suggesting that organisational density will be underestimated. The primary reason for this is that the trade unions find it very difficult to distinguish which members belong to different sectors. As Figure 8 and Figure 9 show, there is a significant degree of sectoral overlap. Therefore, many trade unions have declined to provide membership figures, deeming that there is too high a risk that they may be incorrect. Secondly, those unions that have provided membership figures, as explained above, often do not operate according to the same sectoral definition as the ESSDC. Thus, this probably leads to overestimation of density for these particular unions.

The sizes of these two errors cannot be estimated. On the basis of the available data, around 134,000 trade union members can be counted. If this total is compared with the number of persons employed in the sector in the EU27 (approximately 365,842),[15] the trade union density amounts to 37%.

Looking only at the countries where all trade unions have provided data, density ranges from 2% in Lithuania up to between 90% and 100% in Ireland, Luxembourg and Romania. Organisational density rates thus vary greatly between countries.

[15] SBS data for 2020 in Table 6 indicate 335,295 employees. Dividing the 134,000 trade union members by this number gives a density rate of 40%.

Table 15: Organisational density of trade unions

Member State	Number of sector employees, 2020	Number of unions covered by data	Number of trade union members in the sector	Density based on trade union data (%)
AT	5,380	2/3	4,500	84
BE*	2,669	2/4	3,545[16]	n.d.
BG	21,864	0/2	n.d.	n.d.
CY*	0**	3/3	271	n.d.
CZ	20,310	3/3	13,561	67
DE	47,306	1/2	21,209	45
DK	2,954	1/2	28	1
EE	1,603	No trade unions	No trade unions	No trade unions
EL	5,326	3/3	3,000	56
ES	17,625	0/5	n.d.	n.d.
FI	7,361	7/7	4,210	57
FR	14,359	0/5	n.d.	n.d.
HR	1,951	2/2	450	23
HU	3,865	1/1	1,951	50
IE	2,180	3/3	2,000	92
IT	15,135	0/3	n.d.	n.d.
LT	2,571	1/1	40	2
LU	265	2/2	100%***	100
LV	3,371	No trade unions	No trade unions	No trade unions
MT	150	No trade unions	No trade unions	No trade unions
NL	5,620	1/2	1,960	35
PL	119,838	6/6	82,003	68
PT	9,639	4/4	3,000	31
RO	19,106	3/3	17,300	91

16 The reported number of trade union members appears to be higher than the number of employees in the sector. They might include former employees in the sector who are no longer active in the sector.

Member State	Number of sector employees, 2020	Number of unions covered by data	Number of trade union members in the sector	Density based on trade union data (%)
SE*	2,308[17]	3/4	8,537	n.d.
SI*	0**	3/3	1,125	n.d.
SK	2,765	1/1	2,260	82

Notes: *n.d. = no data. * Clear cases of overestimation of union density. The numbers of affiliated trade union members in Belgium, Cyprus, Sweden and Slovenia are higher than the number of employees in the sector, which brought us to the conclusion that either the reported number of trade union members or the number of employees in the sector is not correct. Furthermore, 'n.d.' was entered for another three countries. ** These countries have no employees in the sector according to Eurostat SBS data. The latest year for registered employees in the sector for Cyprus was in 2010 (around 600) and in 2013 for Slovenia (around 1,000). *** Trade union respondents gave estimates in percentages rather than membership in absolute numbers.*

Sources: *Eurostat SBS, 2019; and data provided by the Network of Eurofound Correspondents, 2021*

2.2. Involvement of trade unions in collective bargaining

The previous section considered the sector-relatedness and membership strength of trade unions. This section analyses their involvement in collective bargaining. Table 16 shows whether trade unions are involved in sector- and/or company-level bargaining. Company-level bargaining covers only the workers employed by a specific employer, while sector-level bargaining covers all employees of the member companies of employer organisations covered by the agreement. The table also includes the share of workers covered by such agreements, as well as the parts of the sector, the types of workers and sizes of companies covered.

In each of the countries where there are sector-related trade unions (all but three), at least one trade union is involved in collective bargaining. Out of the 74 trade unions in the sector, 71 are involved in collective bargaining in some form, at either sector or company level.

[17] There are no Eurostat SBS data for the number of employees in Sweden in the mining of metal ores subsector, which is a traditionally significant industry in Sweden. According to Swedish data, mining and quarrying employ around 7,500 people (SGU, 2024).

Table 16: Involvement of trade unions in collective bargaining

Member State	Trade union	Level and coverage of collective bargaining			Part of the sector covered by collective bargaining												Type of worker covered by collective bargaining						Coverage of collective bargaining per company size				Estimated collective bargaining coverage of whole sector (%)
		Sector level	Company level	% of coverage	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Blue-collar	White-collar	Engineers	Management	Self-employed	Subcontractor	1–9 employees	10–49 employees	50–249 employees	Over 250 employees	
AT	GBH			75*																							
AT	PRO-GE			20																							100
AT	GPA			10																							
BE	ABVV-FGTB ACCG			100																							
BE	ACV-CSC BIE			100																							100
BE	CSC-CNE																										
BE	ACLVB-CGSLB			100																							
BG	Syndical Miners Federation ‘Podkrepa’			80																							80
BG	CITUB-FNSM-miners			80																							
CY	Oikodomoi-PEO			75																							
CY	OOIM-SEK			75																							75
CY	DEOK			17																							
CZ	OS PHGN			90																							85

Member State	Trade union	Level and coverage of collective bargaining			Part of the sector covered by collective bargaining												Type of worker covered by collective bargaining						Coverage of collective bargaining per company size				Estimated collective bargaining coverage of whole sector (%)
		Sector level	Company level	% of coverage	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Blue-collar	White-collar	Engineers	Management	Self-employed	Subcontractor	1–9 employees	10–49 employees	50–249 employees	Over 250 employees	
CZ	OSEH			75																							
CZ	OS KOVO			0																							
DE	IG BCE																										80
DE	IG BAU																										
DK	CO-industri																										90
DK	IDA																										
EE	*No trade unions in the sector*																										
EL	OME			0																							30
EL	Ochmee			0																							
EL	GFWECI																										
ES	UGT-FICA			80																							95
ES	CCOO Industria			80																							
ES	USO FI																										
ES	ELA Industria eta Eraikuntza																										
ES	CIG Industria																										
FI	YTN			5																							

Member State	Trade union	Level and coverage of collective bargaining			Part of the sector covered by collective bargaining												Type of worker covered by collective bargaining						Coverage of collective bargaining per company size				Estimated collective bargaining coverage of whole sector (%)
		Sector level	Company level	% of coverage	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Blue-collar	White-collar	Engineers	Management	Self-employed	Subcontractor	1–9 employees	10–49 employees	50–249 employees	Over 250 employees	
FI	TEK			5													0										75
FI	Insinööri-liitto			5													0										
FI	Teollisuus-liitto			50																							
FI	Pro			25																							
FI	Rakennus-liitto																										
FI	Sähköliitto			0																							
FR	CFE CGC Energies																										
FR	CFE-CGC Métallurgie – FCMTM																										
FR	CFTC – Fédération Chimie, Mines, Textiles, Energie																										99
FR	Fédération CFE-CGC Enermine																										
FR	Fédération nationale de l’Energie																										

Member State	Trade union	Level and coverage of collective bargaining			Part of the sector covered by collective bargaining												Type of worker covered by collective bargaining						Coverage of collective bargaining per company size				Estimated collective bargaining coverage of whole sector (%)
		Sector level	Company level	% of coverage	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Blue-collar	White-collar	Engineers	Management	Self-employed	Subcontractor	1–9 employees	10–49 employees	50–249 employees	Over 250 employees	
	et des Mines CGT-FO																										
FR	Fédération Nationale des Mines et de l'énergie – CGT																										
FR	FGMM-CFDT																										
FR	BA-TI-MAT CFTC																										
FR	CFE-CGC BTP (SICMA)																0										
FR	FNCB-CFDT																										
FR	FG-FO																										
FR	FNSCBA-CGT																										
HR	SGH			30																		1					30
HR	SING			20																							
HU	BDSZ																										70
IE	SIPTU																										35
IE	Unite																										

Member State	Trade union	Level and coverage of collective bargaining			Part of the sector covered by collective bargaining												Type of worker covered by collective bargaining						Coverage of collective bargaining per company size				Estimated collective bargaining coverage of whole sector (%)
		Sector level	Company level	% of coverage	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Blue-collar	White-collar	Engineers	Management	Self-employed	Subcontractor	1–9 employees	10–49 employees	50–249 employees	Over 250 employees	
IE	Connect																										
IT	Filctem CGIL																										80
IT	FEMCA CISL																										
IT	Uiltec UIL																										
LT	LBMAJDPS			240 employ-ees																							<10
LU	OGB-L			90																							90
LU	LCGB-Indusid			90																							
LV	*No trade unions in the sector*																										9**
MT	*No trade unions in the sector*																										0
NL	FNV																										n.d.
NL	CNV																										
PL	SGiE NSZZ Solidarność			60																							70
PL	ZZG			60																							
PL	PZZ Kadra			60			1																				
PL	SPCh NSZZ Solidarność																										

Member State	Trade union	Level and coverage of collective bargaining			Part of the sector covered by collective bargaining												Type of worker covered by collective bargaining						Coverage of collective bargaining per company size				Estimated collective bargaining coverage of whole sector (%)
		Sector level	Company level	% of coverage	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Blue-collar	White-collar	Engineers	Management	Self-employed	Subcontractor	1–9 employees	10–49 employees	50–249 employees	Over 250 employees	
PL	SBiPD NSZZ Solidarność			2																							
PL	Budowlani			2																							
PT	Fiequimetal (STIM is affiliated to Fiequi-metal)			41																							78
PT	STIM (part of Fiequi-metal)			41																							
PT	Feviccom			50																							
PT	SIMA																										
RO	FSGR			15																							80
RO	FNS Salroca			15																							
RO	FNME			80																							
SE	IF Metall																1										95
SE	SEF																										
SE	SI																										
SE	Unionen																										
SI	SPESS			95																							95
SI	SDRES			95																							

Member State	Trade union	Level and coverage of collective bargaining			Part of the sector covered by collective bargaining												Type of worker covered by collective bargaining						Coverage of collective bargaining per company size				Estimated collective bargaining coverage of whole sector (%)
		Sector level	Company level	% of coverage	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Blue-collar	White-collar	Engineers	Management	Self-employed	Subcontractor	1–9 employees	10–49 employees	50–249 employees	Over 250 employees	
SI	ZSSS-KNG			100																							
SK	OZ PBGN			54.5																							55

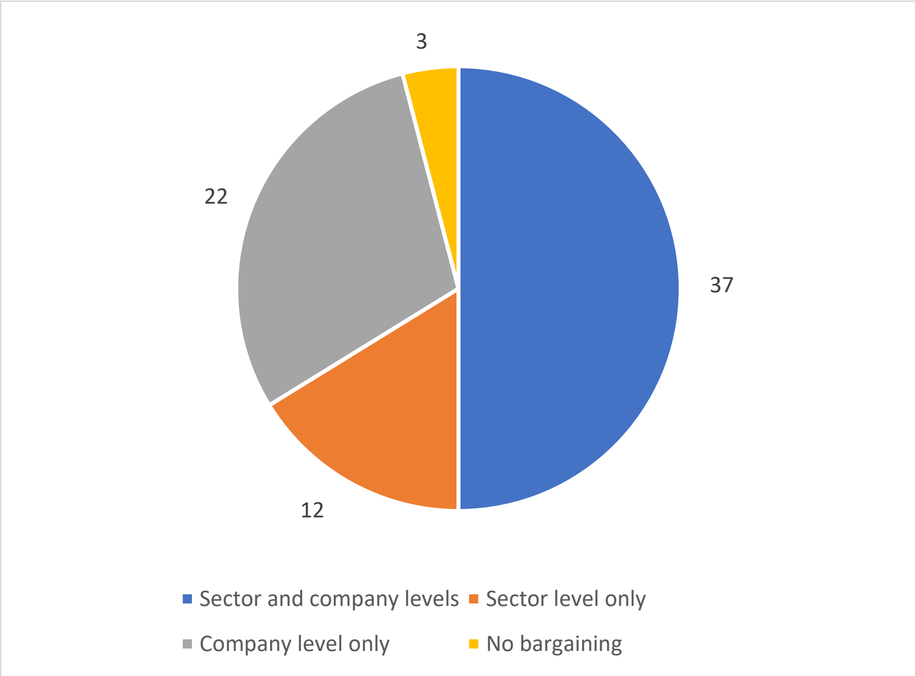
Notes: *n.d. = no data. The red marked organisations were included at the request of IndustriAll Europe; they did not, however, provide any information within the scope of this study. * All together there is 100% coverage of collective bargaining, because of the mandatory membership of the Austrian Federal Chamber of Labour (which delegated the collective bargaining to the trade unions); thus, the collective bargaining coverage for all trade unions together in Austria is 100%. ** Bargaining is done at company level where trade unions are company-specific. There are no qualifying trade union organisations involved in collective bargaining in Latvia.*

Source: *Network of Eurofound Correspondents, 2021*

Table 16 above shows that 49 trade unions are involved in collective bargaining at sector level. Fifty-nine trade unions are involved in bargaining at company level. Combining the two types of bargaining is also fairly common, as is evident from Table 10, showing the sector trade unions' current involvement status.

Out of the 74 trade unions in the sector, 37 (50%) are involved in both sector- and company-level bargaining. Another 22 (30%) are only involved in company-level bargaining, while 12 (16%) are exclusively involved in sector-level bargaining.

Figure 10: Involvement of trade unions in different forms of collective bargaining (number of trade unions), 2021



Note: *n = 74.*
Source: *Network of Eurofound Correspondents, 2021*

The data regarding what proportion of the workforce is covered by collective bargaining are based on estimates that have been either provided by members of the Network of Eurofound Correspondents or inferred from general information about collective bargaining coverage (particularly where such coverage is near universal) and systems for the extension of collective agreements (see, for example, Eurofound, 2011; Oesingmann, 2016). As the last column in Table 16 shows, the estimated collective bargaining coverage varies considerably between Member States but is, on the whole, rather high. In two Member States (Austria and Belgium) the entire workforce in the sector is covered by collective bargaining agreements, while in fourteen countries (Bulgaria, Cyprus, Czechia, Denmark, Germany, Finland, France, Italy, Luxembourg, Portugal, Romania, Slovenia, Spain and Sweden) between 71% and 99% of the sectoral workforce is covered by some form of collective bargaining. More than half of the sectoral workforce, specifically between 51% and 70%, is covered in three central and eastern European countries (Hungary, Poland and Slovakia), while in Ireland the coverage is estimated at 35%. In three countries (Croatia, Greece and Lithuania) the coverage is between 1% and 30%. Estonia, Latvia and Malta are the only countries in which the collective bargaining coverage in this sector is 0%. No data were available for the Netherlands.

2.3. Extractive industries sector employer organisations

Of the 75 employer organisations and 3 business associations active in the sector, none have member companies in all parts of the sector (as defined for the purpose of this study). Similarly to the trade union landscape, the type of sector coverage differs significantly between employer organisations, with some covering companies in only a specific part of the sector, while others cover very large parts of the sector. As with the trade unions, this is most probably a reflection of the types of extractive industries that exist in the countries. More detailed breakdowns of employer organisation representation in the sector by NACE code and sectoral categories are shown in Tables 17–19.

Table 17: Employer organisations by type of sector coverage

	Subsector											
	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other
Number of employer organisations covering subsector	17	17	16	43	23	30	26	28	13	6	7	16
Share of all sector employer organisations covering subsector (%)	23	23	22	59	32	41	36	38	18	8	10	22

Source: *Network of Eurofound Correspondents, 2021*

Table 18: Width of employer organisation coverage (number and %)

Number of subsectors covered	0	1	2	3	4	5	6	7	8	9	10	11	12
Number of employer organisations	1	26	13	4	6	5	9	3	1	4	1	0	0
% of employer organisations	1	36	18	5	8	7	12	4	1	5	1	0	0

Source: *Network of Eurofound Correspondents, 2021*

Table 19: Sector coverage of employer organisations

Member State	Employer organisation	Parts of the sector covered												Involvement in collective bargaining		Affiliations				
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
AT	BIB				■	■	■	■	■	■	■			■						
AT	FBS	■	■	■				■		■		■		■		■				
AT	FSKI				■	■	■	■	■	■	■			■				■	■	
BE	Fediex			■	■		■	■	■				■	■				■	■	
BE	Bedrijfsgroepering Zandgroeven			■	■			■						■						
BE	Fédération de l'Industrie des Carrières de Grès							■	■				■	■						
BE	Belgische Steenkoolfederatie	■												■						
BE	Union des Carrières et Scieries de Marbres de Belgique								■					■						
BE	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique				■				■					■						
BE	Bedrijfsgroepering der Limburgse Baggeraars				■									■						
BG	Bulgarian Chamber of Mining and Geology	■	■		■		■		■				■	■	■	■				
CY	ΟΣΕΟΚ				■									■					■	
CY	CAPA				■														■	
CZ	ZSDNP	■			■	■	■	■	■					■			■			
CZ	Těžební unie	■			■	■	■	■	■	■			■			■				
CZ	SVVAPNO						■											■		
DE	a-vero				■		■	■	■					■	■					
DE	Debriv	■		■										■			■			
DE	VKS									■		■		■		■				
DE	VRB	■	■	■	■	■	■	■	■				■			■				
DE	BV Kalk						■											■		
DE	BV MIRO				■				■					■				■	■	
DE	BSN	■													■		■			
DE	BKRI				■	■	■	■	■				■					■		
DK	Danske Råstoffer			■	■			■	■					■					■	
DK	DI					■	■				■	■		■				■	■	
EE	EMTEL			■	■	■	■													
EE	Turbaliit										■									
EL	GMEA	■	■		■			■	■	■				■		■				
ES	FdA				■	■													■	
ES	Ancade				■		■							■				■		
ES	Confedem		■	■						■						■				

Member State	Employer organisation	Parts of the sector covered												Involvement in collective bargaining		Affiliations				
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
ES	ATEDY				X									X						
ES	Cominroc							X												
ES	Confevicex				X									X						
ES	Afasal											X		X						
ES	Aindex							X												
ES	Primigea		X					X												
ES	Ibersil							X										X		
ES	Carbunión	X																X		
FI	FinnMinn		X		X		X	X		X							X			
FI	Koneyrittäjät ry										X			X						
FI	Kivi				X	X			X					X						
FI	RT				X	X	X		X				X	X					X	
FI	Technology Industry Employers of Finland		X											X						
FI	Infra ry				X	X	X	X	X				X	X					X	
FR	Unicem				X	X	X	X	X	X			X	X					X	
FR	UP Chaux						X							X				X		
FR	UNPG																		X	
HR	HUP UINMGMRH			X	X	X	X						X		X					
HU	MBSZ	X	X		X		X		X				X		X	X			X	
IE	ICF				X														X	
IT	Anepla				X	X								X					X	
IT	Assorisorse	X	X	X	X	X	X	X	X	X		X		X				X		
LT	Association of Lithuanian Quarries																			
LT	Lithuanian Peat Producers Association (LD)																			
LU	*No employer organisation in the sector*																			
LV	BRA				X															
LV	LKA										X									
MT	MDA			X	X	X	X		X											
NL	Cascade				X		X												X	
PL	PPWB	X												X			X			
PL	Polska Miedź		X													X				
PL	SPW						X											X		
PL	GIPH	X					X										X			
PL	PZPK					X													X	
PT	ANIET		X		X									X		X			X	
PT	Assimagra																			
RO	PPAM			X	X	X	X	X	X										X	
RO	PAT RO MIN	X	X	X								X	X				X			
SE	Svemin		X	X	X	X	X	X	X	X			X			X				
SE	GAF		X	X	X	X	X	X	X	X			X	X	X					
SE	SMBI				X	X													X	
SI	GZS-ZKM												X	X						
SI	ZDS	X			X	X	X	X	X	X		X	X							
SI	EZS	X												X						
SK	ZHŤPG	X	X	X	X									X	X					

Member State	Employer organisation	Parts of the sector covered												Involvement in collective bargaining		Affiliations				
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
SK	SZVK				X				X										X	
SK	SBK		X		X			X	X							X			X	

Notes: *The organisations in orange are business associations, which do not qualify as employer organisations; they are listed below in Table 20. In Lithuania, the Association of Lithuanian Quarries has 25 affiliated construction minerals companies and LD has 12 affiliated companies active in construction minerals and the extraction of peat. In Portugal, Assimagra has 80 sectoral affiliated companies active in construction minerals and industrial minerals. Neither the Association of Lithuanian Quarries and LD from Lithuania nor Assimagra from Portugal are involved in social dialogue or collective bargaining; they are business associations and therefore mentioned below in Table 20, but not further considered within the scope of this study.*

Source: *Network of Eurofound Correspondents, 2021*

Three organisations have not been included in Table 19 as they do not meet the qualification criteria. However, they are probably significant for the national sector and are therefore described in Table 20.

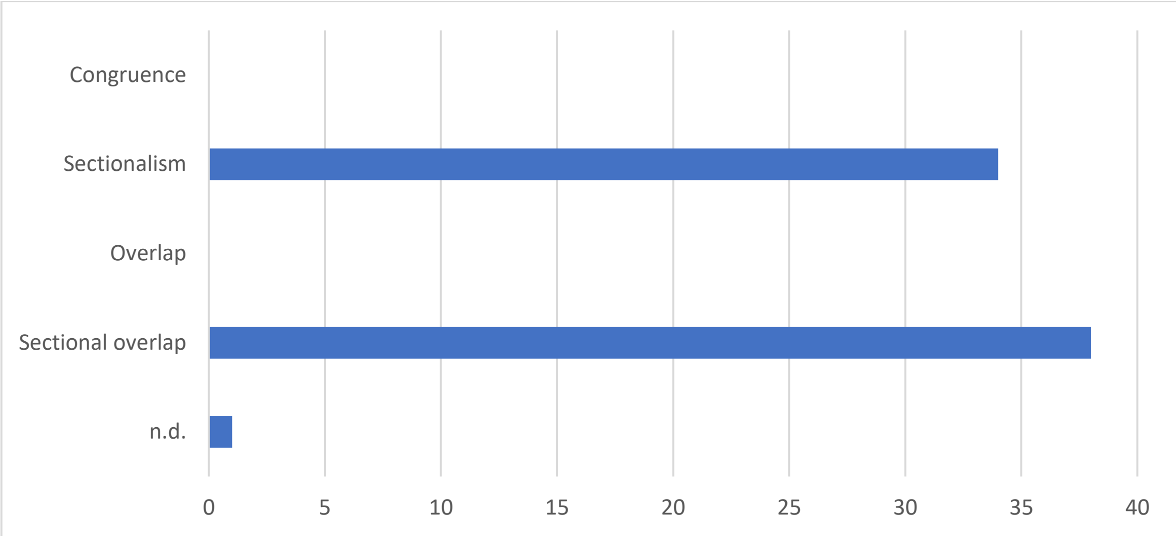
Table 20: Business associations active in extractive industries but not qualifying as employer organisations

Member State	Name/ abbreviation	Notes
LT	Lietuvos karjerų asociacija	Lietuvos karjerų asociacija, or the Association of Lithuanian Quarries, has 25 member companies active in extraction of construction minerals. According to the association, its members cover approximately 40% of the dolomite, sand, gravel and related products in Lithuania. Some 5,200 employees work in member companies. The organisation is neither involved in collective bargaining nor a member of a sector-related European organisation. It is, however, consulted by the government on sector-related matters on an ad hoc basis and is a member of the Confederation of Lithuanian Industrialists (LPK).
	LD	Durpių įmonių asociaciją „Lietuviškos durpės" (LD), or the Lithuanian Peat Producers Association, represents a significant share of the volume of peat production in Lithuania. The number of workers covered is not known. The organisation is neither involved in collective bargaining nor a member of a sector-related European organisation. It is, however, consulted by the government on sector-related matters on an ad hoc basis and is a member of the LPK.
PT	Assimagra	Associação Portuguesa dos Industriais de Mármores, Granitos e Ramos Afins (Assimagra) used to be involved in collective bargaining but is no longer. The organisation has around 80 company members with 2,300 workers in the sector.

Source: *Network of Eurofound Correspondents, 2021*

The sector-relatedness of employer organisations has been assessed regarding whether their membership includes affiliates in the main parts of the sector in terms of economic activities. Figure 11 and Table 21 show the domain coverage of the employer organisations in the sector. As we have seen above, the organisations cover only one or a few parts of the sector. In fact, none of them can be considered to cover the whole sector, neither by a perfectly matching domain (congruence) nor by covering the entire sector and also parts of others (overlap).

Figure 11: Membership domain of employer organisations in the extractive industries sector (number)

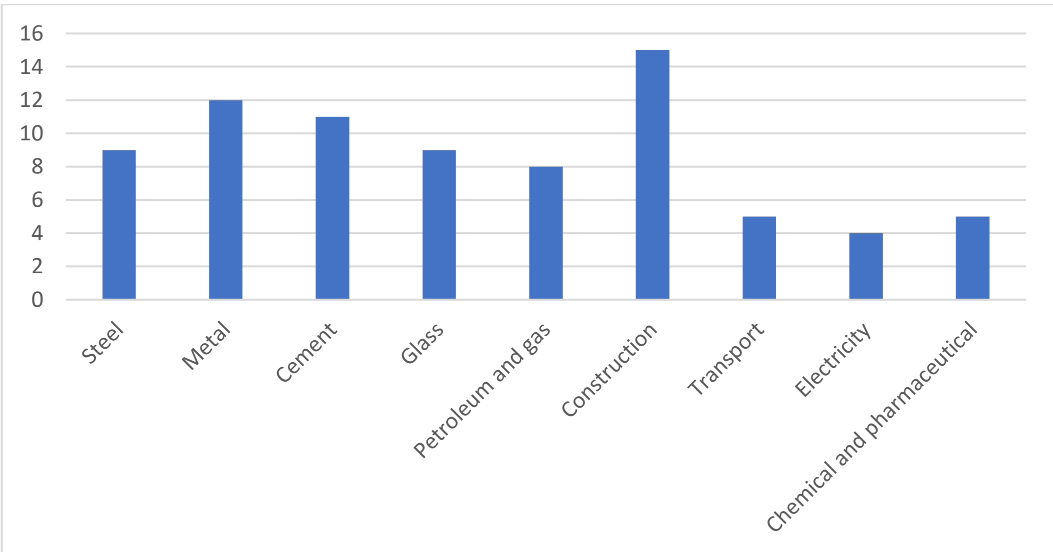


Note: *n.d. = no data.*

Source: *Network of Eurofound Correspondents, 2021*

The employer organisations in the sector are fairly evenly divided between two domain types, sectionalism (34 out of 75, or 45%) and sectional overlap (38 out of 75, or 51%), meaning that they either only cover one part of the sector or, in addition to covering one part of the sector, also cover (parts of) other sectors. The sectors most frequently overlapped with are presented in Figure 12.

Figure 12: Sector overlap – Other sectors covered by employer organisations in extractive industries



Source: *Network of Eurofound Correspondents, 2021*

Table 21 shows the membership domain of each individual employer organisation in the extractive industries sector.

Table 21: Membership domain of employer organisations in the extractive industries sector

Member State	Congruence	Sectionalism	Overlap	Sectional overlap
AT				BIB FBS FSKI
BE		Fediex Bedrijfsgroepering Zandgroeven Fédération de l'Industrie des Carrières de Grès Belgische Steenkoolfederatie Union des Carrières et Scieries de Marbres de Belgique Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique Bedrijfsgroepering der Limburgse Baggeraars		
BG				Bulgarian Chamber of Mining and Geology
CY		CAPA ΟΣΕΟΚ		
CZ				ZSDNP Těžební unie SVVAPNO
DE		Debriv VRB BV Kalk BV MIRO BSN BKRI		a-vero VKS
DK		Danske Råstoffer		DI
EE		Turbaliit		EMTEL
EL		Carbunión		GMEA
ES		FdA Ancade Confedem Confevicex Afasal Aindex		ATEDY Cominroc Primigea Ibersil
FI		FinnMinn		Koneyrittäjät ry Kivi RT Technology Industry Employers of Finland Infra ry
FR[18]		Unicem UP Chaux		
HR				HUP UINMGMRH

[18] No data are available on the domain for UNPG.

Member State	Congruence	Sectionalism	Overlap	Sectional overlap
HU				MBSZ
IE				ICF
IT		Anepla		Assorisorse
LT				
LU				
LV		LKA		BRA
MT				MDA
NL		Cascade		
PL		PPWB SPW GIPH PZPK		Polska Miedź
PT				ANIET
RO		PAT RO MIN		PPAM
SE		Svemin		GAF SMBI
SI				GZS-ZKM ZDS EZS
SK		SZVK		ZHŤPG SBK

Source: *Network of Eurofound Correspondents, 2021*

The following assesses the membership strength (organisational density) of employer organisations in the extractive industries sector. Density can be assessed in two different ways: by looking at the share of employers in the sector represented by different organisations or by looking at the share of sector employees working in companies organised by specific employer organisations.

Density in terms of company coverage varies considerably between the Member States. For instance, Germany has close to full coverage while several other countries have only a few per cent.

Table 22: Organisational density of employer organisations

Member State	Number of sector employees, 2020	Share of employer organisations covered by data	Companies covered by employer organisations	Number of companies in sector	% of companies covered by employer organisation	Workforce of organised companies	Density of workforce of organised companies (%)
AT	5,380	3/3	620	305	n.d.	No number provided, estimation 100%	Estimation 100
BE	2,443	2/8	75	179	42	3,000*[19]	n.d.
BG	21,864	1/1	30	306	10	No number provided, estimation >50%	Estimation >50
CY	0	1/2	16	0	n.d.	0	0
CZ	20,310	3/3	40	435	9	30,800[20]	n.d.

[19] The number provided for one employer organisation (3,000) is higher than the total employment; no data were provided for the remaining two employer organisations.

[20] The sum provided for the three employer organisations (30,800) is higher than the total employment.

Member State	Number of sector employees, 2020	Share of employer organisations covered by data	Companies covered by employer organisations	Number of companies in sector	% of companies covered by employer organisation	Workforce of organised companies	Density of workforce of organised companies (%)
DE	47,306	7/8	1,515	1,654	92	No number provided, estimation 100%	Estimation 100
DK	2,954	2/2	43	215	20	No number provided, estimation 90%	Estimation 90
EE	1,603	2/2	54	152	36	700 (data provided for 1 employer organisation only)	44
EL	5,326	1/1	29	547	5	12,000[21]	n.d.
ES	17,625	10/11	831	1,809	46	No number provided, estimation for two employer organisations – 25%	Estimation 25
FI	7,361	6/6	485	887	55	No number provided, estimations for all 6 employer organisations amounting to 100%	n.d.
FR	14,359	2/3	2 014	984	n.d.*	No number provided, estimations for all employer organisations amounting to 100%	n.d.
HR	1,951	1/1	60	190	32	No number provided, estimation 25%	Estimation 25
HU	3,865	1/1	65	351	19	No number provided, estimation 45%	Estimation 45
IE	2,180	1/1	74	411	18	n.d.	n.d.
IT	15,135	2/2	147	1,736	8	n.d.	n.d.
LT	2,571	No employer organisation	No employer organisation	134	0	No employer organisation	n.d.

[21] The provided number (12,000) is higher than the total employment number.

Member State	Number of sector employees, 2020	Share of employer organisations covered by data	Companies covered by employer organisations	Number of companies in sector	% of companies covered by employer organisation	Workforce of organised companies	Density of workforce of organised companies (%)
LU	265	No employer organisation	No employer organisation	9	0	No employer organisation	n.d.
LV	3,371	2/2	17	339	5	No number provided, estimation 80%	Estimation 80
MT	150	1/1	45	0	n.d.	No number provided, estimation 90%	Estimation 90
NL	5,620	1/1	25	544	5	No number provided, estimation 90% of NACE 8.1	n.d.
PL	119,838	5/5	83	2,481	3	No number provided, estimation for 2 employer organisations – 60%	n.d.
PT	9,639	1/1	100	1,023	10	No number provided, estimation 40%	Estimation 40
RO	19,106	1/2	28	1,001	3	No number provided, estimation 100%	Estimation 100
SE	2,308[22]	3/3	133	587	23	No number provided, estimation 99–100%	Estimation 99–100
SI	0	3/3	4	86	5	No number provided, estimation 100%	Estimation 100
SK	2,765	3/3	96	279	34	No number provided, estimation 80–100%	Estimation 80–100

Notes: *n.d. = no data. * Clear cases of overestimation of employer organisation density. The numbers of affiliated company members in Belgium and France are higher than the number of enterprises in the sector (Eurostat SBS, 2020), which brought us to the conclusion that either the reported number of company members or the number of enterprises in the sector is not correct.*

Sources: *Eurostat SBS, 2020; and data provided by the Network of Eurofound Correspondents, 2021*

[22] There are no Eurostat SBS data for number of employees in Sweden in the mining of metal ores subsector, which is a traditionally significant industry in Sweden. According to Swedish data, mining and quarrying should employ around 7,500 people (SGU, 2024).

2.4. Involvement of employer organisations in collective bargaining

The previous section considered the sector-relatedness and membership strength of employer organisations. This section examines their involvement in collective bargaining and the number of employees covered by collective bargaining agreements signed by these organisations.

Table 23 shows whether employer organisations are involved in sector- and/or company-level bargaining. Company-level bargaining covers only the workers employed by a specific employer, while sector-level bargaining covers all employees of the member companies of employer organisations covered by the agreement. The table also includes the share of workers covered by such agreements, as well as the parts of the sector, the types of workers and the sizes of companies covered.

In 19 countries at least one employer organisation is involved in collective bargaining. In six countries where there are sector-related employer organisations, none of them are involved in collective bargaining. Two countries (Lithuania and Luxembourg) have no employer organisations in the sector.

Table 23: Involvement of employer organisations in collective bargaining

Member State	Employer organisation	Collective bargaining level		Collective bargaining coverage												Collective bargaining company size coverage			
		Sector-level bargaining	Company-level bargaining	5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	1–9 employees	10–49 employees	50–249 employees	Over 250employees
AT	BIB																		
AT	FBS																		
AT	FSKI																		
BE	Fediex																		
BE	Bedrijfsgroepering Zandgroeven																		
BE	Fédération de l'Industrie des Carrières de Grès																		
BE	Belgische Steenkoolfederatie																		
BE	Union des Carrières et Scieries de Marbres de Belgique																		
BE	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique																		
BE	Bedrijfsgroepering der Limburgse Baggeraars																		
BG	Bulgarian Chamber of Mining and Geology																		
CY	ΟΣΕΟΚ																		
CY	CAPA																		
CZ	ZSDNP																		

CZ	Těžební unie																		
CZ	SVVAPNO																		
DE	a-vero																		
DE	Debriv																		
DE	VKS																		
DE	VRB																		
DE	BV Kalk																		
DE	BV MIRO																		
DE	BSN																		
DE	BKRI																		
DK	Danske Råstoffer																		
DK	DI																		
EE	EMTEL																		
EE	Turbaliit																		
EL	GMEA																		
ES	FdA																		
ES	Carbunión																		
ES	Ancade																		
ES	Confedem																		
ES	ATEDY																		
ES	Cominroc																		
ES	Confevicex																		
ES	Afasal																		
ES	Aindex																		
ES	Primigea																		
ES	Ibersil																		
FI	FinnMinn																		
FI	Koneyrittäjät ry																		
FI	Kivi																		
FI	RT																		
FI	Technology Industry Employers of Finland																		
FI	Infra ry																		
FR	Unicem																		
FR	UP Chaux																		
FR	UNPG																		
HR	HUP UINMGMRH																		
HU	MBSZ																		
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IT	Anepla																		
IT	Assorisorse																		
LV	BRA																		
LV	LKA																		
MT	MDA																		
NL	Cascade																		
PL	PPWB																		
PL	Polska Miedź																		
PL	SPW																		
PL	GIPH																		
PL	PZPK																		
PT	ANIET																		
RO	PPAM																		
RO	PAT RO MIN																		
SE	Svemin																		
SE	GAF																		
SE	SMBI																		
SI	GZS-ZKM																		
SI	ZDS																		
SI	EZS																		
SK	ZHŤPG																		
SK	SZVK																		

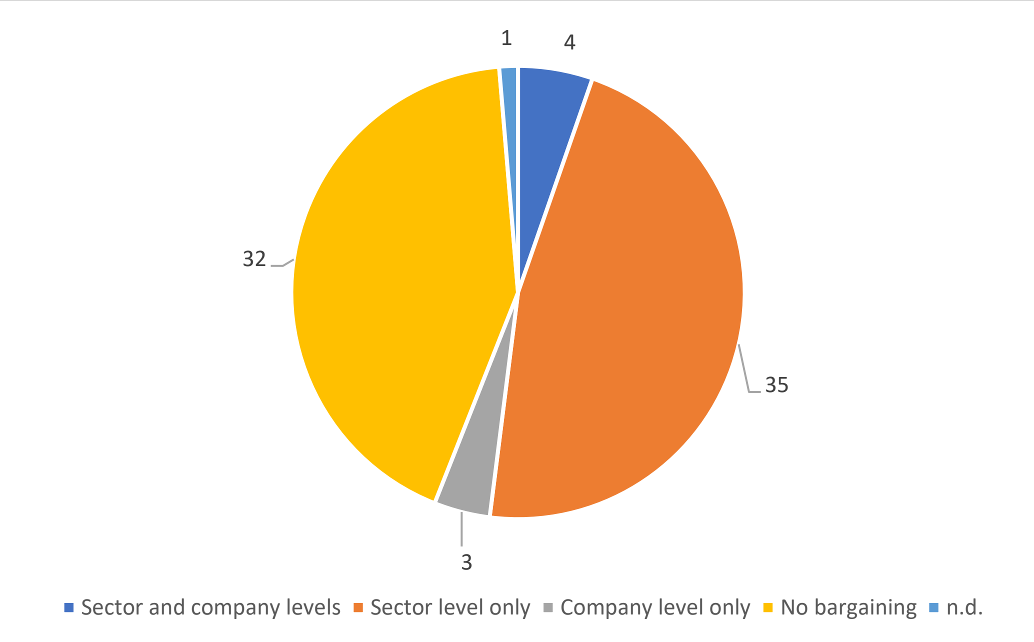
SK	SBK																		

Source: *Network of Eurofound Correspondents, 2021*

In total, 42 of the 75 employer organisations (56%) are involved in collective bargaining. The table shows that 39 employer organisations are involved in collective bargaining at sector level, and that 7 employer organisations are involved at company level.

As shown in Figure 13, only four employer organisations (5%) are involved in both sector- and company-level bargaining. Three (4%) are only involved in company-level bargaining, while the majority, 35 (47%), are exclusively involved in sector-level bargaining. A large proportion of the employer organisations in the sector, 32 (42%), are not involved in bargaining at any level.

Figure 13: Involvement of employer organisations in different forms of collective bargaining (number of organisations), 2021



Note: *n = 75; n.d. = no data.*

Source: *Network of Eurofound Correspondents, 2021*

2.5. Collective bargaining patterns and social dialogue practices

As outlined previously, the representativeness of the national social partner organisations is important for the implementation at national, regional and local levels of any agreements made by European-level organisations. The relevance of European sectoral social dialogue tends to increase along with the ability of national affiliates of the European organisations to regulate employment terms and influence national public policies affecting the sector (Perin and Léonard, 2011).

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). This correlation is also evident in the analysis of extractive industries sector organisations' involvement in bipartite and tripartite bodies, as presented in this section. Multi-employer bargaining tends to have greater significance, primarily because of the macroeconomic impact of such agreements. An exception to this rule is the existence of single-employer agreements with very large employers, which serve as industry standards.

Table 24 summarises the coverage of different types of collective bargaining in terms of numbers of individual trade unions and employer organisations. With the exception of three organisations (4%), all trade unions in the sector are involved in collective bargaining. Among the 74 trade unions, 49 (66%) are involved in multi-employer bargaining. Of those, 12 (16%) only participate in multi-employer bargaining, while 37 (50%) are involved in both multi-employer and single-employer bargaining. The remaining 22 (30%) are only involved in single-employer bargaining.

Of the 75 employer organisations in the sector, 42 (56%) are involved in collective bargaining. Most of them are involved in multi-employer bargaining: 35 (47%) take part in multi-employer bargaining only and 4 (5%) also participate in single-employer bargaining. Only three (4%) are involved exclusively in single-employer bargaining.

Table 24: Collective bargaining in the extractive industries sector (number and % of organisations), 2021

<table>
<tr><th></th><th colspan="5">Trade unions</th><th colspan="5">Employer organisations</th></tr>
<tr><td>No collective bargaining</td><td colspan="4">3 (4%)</td><td rowspan="5">74 (100%)</td><td colspan="4">32 (42%)</td><td rowspan="5">75 (100%)</td></tr>
<tr><td>Multi-employer bargaining only</td><td>12 (16%)</td><td rowspan="2">49 (66%)</td><td></td><td rowspan="3">71 (96%)</td><td>35 (47%)</td><td rowspan="2">39 (52%)</td><td></td><td rowspan="3">42 (56%)</td></tr>
<tr><td>Both single- and multi-employer bargaining</td><td>37 (50%)</td><td rowspan="2">59 (80%)</td><td>4 (5%)</td><td rowspan="2">7 (10%)</td></tr>
<tr><td>Single-employer bargaining only</td><td>22 (30%)</td><td></td><td>3 (4%)</td><td></td></tr>
<tr><td>No data available</td><td></td><td></td><td></td><td></td><td>1 (1%)</td><td></td><td></td><td></td></tr>
</table>

Source: *Network of Eurofound Correspondents, 2021*

Table 25 presents collective bargaining information on a country-by-country basis, illustrating the different national collective bargaining patterns. Combining single-employer and multi-employer bargaining is the most common bargaining pattern, although not necessarily by one and the same organisation. Combination may occur from one national organisation exclusively engaging in single-employer bargaining and another in multi-employer bargaining. Some form of sector-related collective bargaining occurs in all Member States except for Estonia, Latvia and Malta.

Table 25: Type of collective bargaining, by Member State, 2021

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

Source: *Network of Eurofound Correspondents, 2021*

Table 26 shows vertically the level of bargaining that takes place in different countries, and horizontally the proportion of the sectoral workforce covered by collective bargaining.

Table 26: Coverage of collective bargaining, 2021

Type of collective bargaining	Collective bargaining coverage						Information not available
	>94%	75–94%	50–74%	25–49%	1–24%	0%	
Multi-employer bargaining	AT	DK		EL			
Single-employer bargaining and multi-employer bargaining	BE, ES, FR, SE, SI	BG, CY, CZ, DE, FI, IT, PT	PL, SK				
Single-employer bargaining		LU, RO	HU	HR, IE	LT		NL
No collective bargaining					LV[23]	EE, MT	

Source: *Network of Eurofound Correspondents, 2021*

2.6. Participation in sectoral policies and national sectoral social dialogue

Involvement in policymaking is another indicator of the relevance of national social partner organisations in the sector. In a significant number of Member States (particularly in northern and western Europe), social partners' participation in the making of public policy is long established. In a number of other countries (particularly in central and eastern Europe), such involvement has emerged more recently, but in many of these countries it is already rather formalised, for instance in tripartite bodies at central level.

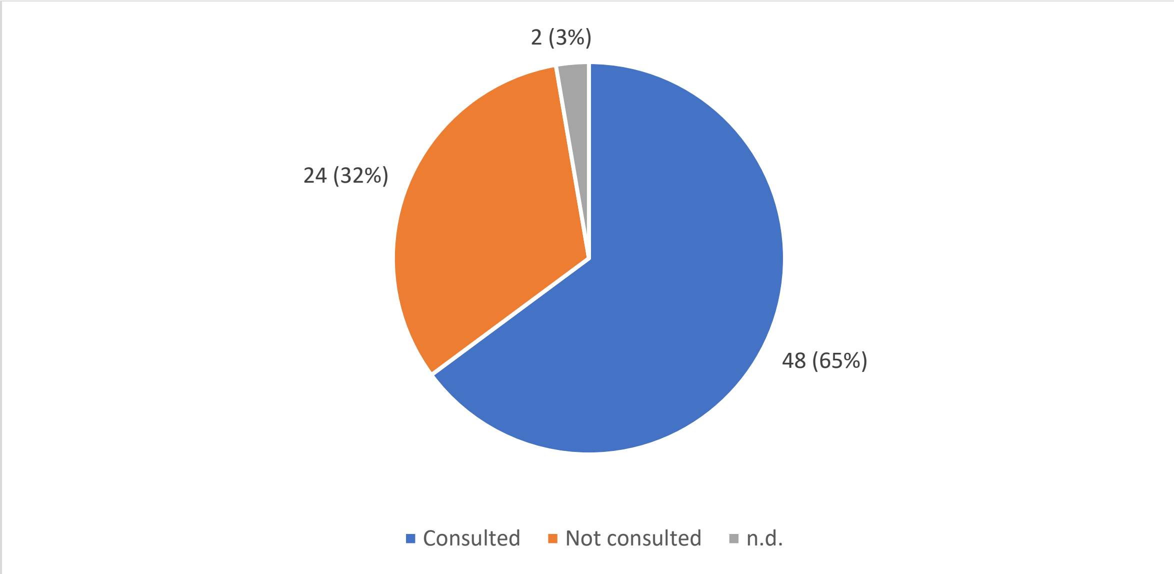
Participation in sectoral policies by trade unions and employer organisations

Figure 14 provides an overview of the involvement of trade unions in relevant policymaking at national level. This shows that 48 trade unions (65%) are consulted by the government on sector-related matters and 24 (32%) are not. For two trade unions (3%), not enough information was available to assess whether or not

[23] Bargaining is done at company level where trade unions are company-specific. There are no qualifying trade union organisations involved in collective bargaining in Latvia.

they are consulted. Among the consulted trade unions, half stated that consultation was done regularly and half stated that it was done on an ad hoc basis.

Figure 14: Trade union involvement in consultation

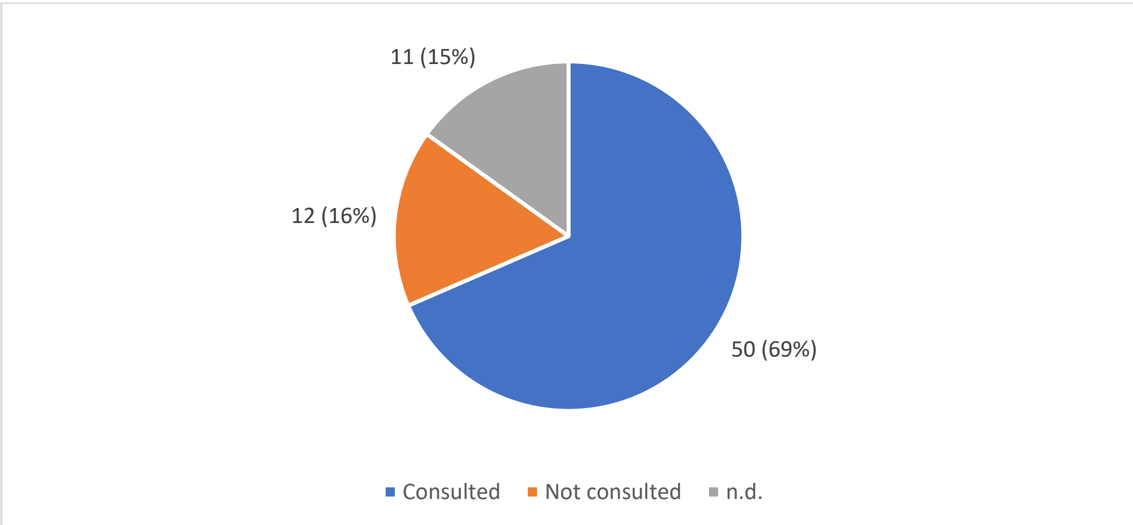


Note: *n.d. = no data.*

Source: *Network of Eurofound Correspondents, 2021*

Of the 75 employer organisations in the extractive industries sector, 50 (69%) are consulted by the government on sector-related matters, while 12 (16%) are not (Figure 15). For 11 employer organisations (15%), not enough information was available to assess whether or not they are consulted. Among the 50 organisations that are consulted, around two-thirds stated that consultation was done on a regular basis and one-third stated that it was done on an ad hoc basis.

Figure 15: Employer organisation involvement in consultation



Note: *n.d. = no data.*

Source: *Network of Eurofound Correspondents, 2021*

Table 27 shows that, in most countries where there was a trade union active in the sector (all but Estonia, Latvia and Malta), at least one trade union in the sector was consulted. The exceptions are Ireland and Luxembourg, where there are trade unions but none were consulted.

Table 27: Consultation of employer organisations and trade unions, by Member State

	Trade unions consulted	No trade unions consulted
Employer organisations/business associations consulted	AT, BE, CZ, DE, DK, EL, ES, FI, FR, HR, HU, IT, PL, RO, SE, SI, SK	EE (no trade union in the sector), LV (no trade union in the sector), MT (no trade union in the sector)
No employer organisations/business associations consulted	BG, CY, LT (no employer organisation in the sector), NL, PT	IE, LU (no employer organisation in the sector)

Source: *Network of Eurofound Correspondents, 2021*

On the employers' side, in five of the countries where there are employer organisations that could potentially be consulted (Bulgaria, Cyprus, Ireland, the Netherlands and Portugal), none of them reported being consulted by the government. In 20 Member States, at least one employer organisation was consulted.

Bipartite and tripartite social dialogue structures for the extractive industries sector

The common involvement of trade unions and employer organisations in tripartite and/or bipartite bodies, in which sector-related topics are dealt with or sector-related bodies are involved, implies some kind of mutual recognition. For EU Member States without established practices of multi-employer bargaining, this involvement can be a way to gain mutual recognition as representative counterparts. Table 28 indicates the trade unions and employer organisations that participate in these structures. In total, 15 countries have sector-related bipartite and/or tripartite bodies. In terms of sector-relatedness, however, it is not always completely clear whether these are strictly sector-related or part of a wider setting.

Table 28: Tripartite and bipartite social dialogue bodies dealing with sector-related issues or involving sector-related social partners, 2021

Member State	Name of body	Domain of activity	Bipartite or tripartite	Origin (agreement or statutory)	Trade unions having representatives	Employer organisations having representatives
AT	Arbitration board	If an employer belongs to more than one sectoral employer organisation, the arbitration board (consisting of representatives of the employer organisations and trade unions) decides which collective agreement is to be applied.	Bipartite	Agreement		
BE	JC 203	Joint committee	Bipartite	Statutory	ACV-CSC BIE; CSC-CNE; ACLVB-CGSLB; ABVV-FGTB ACCG	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique

	JC 205	Joint committee	Bipartite	Statutory	ACV-CSC BIE; CSC-CNE; ABVV-FGTB ACCG	Belgische Steenkoolfederatie
	JC 102.1	Joint committee	Bipartite	Statutory	ACV-SCS BIE; ABVV-FGTB ACCG	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique
	JC 102.2	Joint committee	Bipartite	Statutory	ACV-SCS BIE; ABVV-FGTB ACCG	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique
	JC 102.3	Joint committee	Bipartite	Statutory	ACV-SCS BIE; ABVV-FGTB ACCG	Verbond van ontginnings- en veredelingsbedrijven van onbrandbare gesteenten
	JC 102.4	Joint committee	Bipartite	Statutory	ACV-SCS BIE; ABVV-FGTB ACCG	Fédération de l'Industrie des Carrières de Grès
	JC 102.5	Joint committee	Bipartite	Statutory	ACV-SCS BIE; ABVV-FGTB ACCG	Bedrijfsgroepering Zandgroeven
	JC 102.6	Joint committee	Bipartite	Statutory	ACV-SCS BIE; ABVV-FGTB ACCG	Bedrijfsgroepering Zandgroeven; Bedrijfsgroepering der Limburgse Baggeraars
	JC 102.7	Joint committee	Bipartite	Statutory	ACV-SCS BIE; ABVV-FGTB ACCG	Verbond van ontginnings- en veredelingsbedrijven van onbrandbare gesteenten
	JC 102.8	Joint committee	Bipartite	Statutory	ACV BIE; ACCG	Union des Carrières et Scieries de Marbres de Belgique
	JC 102.9	Joint committee	Bipartite	Statutory	ACV BIE; ACCG	Verbond van ontginnings- en veredelingsbedrijven van onbrandbare gesteenten
	JC 102.11	Joint committee	Bipartite	Statutory	ACV BIE; ACCG	Verbond van ontginnings- en veredelingsbedrijven van onbrandbare gesteenten
BG	Branch council for tripartite cooperation in the Ministry of Energy	Mining of coal, energy resources and mine construction	Tripartite	Agreement	Syndical Miners Federation 'Podkrepa'; CITUB-FNSM-miners	Bulgarian Chamber of Mining and Geology
	Branch council for tripartite cooperation in the Ministry of Economy	Exploration, mining and processing of non-energy products	Tripartite	Agreement	Syndical Miners Federation 'Podkrepa'; CITUB-FNSM-miners	Bulgarian Chamber of Mining and Geology
	Branch council for tripartite cooperation in the	OSH	Tripartite	Agreement	Syndical Miners Federation 'Podkrepa'; CITUB-FNSM-miners	Bulgarian Chamber of Mining and Geology

	Ministry of Energy					
CY	No social dialogue bodies					
CZ	No social dialogue bodies					
DE	No social dialogue bodies					
DK	BFA Industry (trade association industry)	Working environment in the entire manufacturing sector	Bipartite	Statutory	CO-industri; Dansk Metal; 3F Industri; HK Privat; Dansk El-Forbund; Fødevareforbundet NNF; Teknisk Landsforbund	DI (Dansk Industri); Grakom; Mediearbejdsgiverne; Dansk Mode og Textil; Lederne
EE	Occupational Qualification Council: Energy, Mining and Chemical Industry (under the Estonian Qualifica-tions Authority)	Develops a professional system in its field of professional activity. Makes proposals for the development of professional standards and approves professional standards. Gives the right to awarding bodies to award professional qualifications and exercise supervision.	Tripartite	Statutory		EMTEL; EETL
EL	No social dialogue bodies					
ES	Agreement on Just Transition in the Coal Mining Sector	Coal mining	Tripartite	Agreement	UGT-FICA; CCOO Industria; USO FI	Carbunión
FI	Turvet-yöryhmä (Peat working group)	Peat extraction	Bipartite	Agreement	None	Finnish Energy Industries; Finnish Peat Producers
	Sectoral Committee of the technology industry sector	OSH	Bipartite	Agreement	Pro; Teollisuusliitto	Finnish Technology Industries
FR	Commission paritaire permanente de négociation et d'interpréta-tion (CPPNI)	Collective bargaining, interpretation of the national collective agreement	Bipartite	Agreement	FNSCBA-CGT; FNCB-CFDT; FG-FO; BA-TI-MAT CFTC; CFE-CGC BTP (SICMA)	Unicem; FIB; UP Chaux
	Commission paritaire nationale de l'emploi et de la formation des industries de carrières et matériaux de construction (CPNEFP)	Body for mutual information, study, consultation and deliberation in the field of vocational training and employment	Bipartite	Agreement	FNSCBA-CGT; FNCB-CFDT; FG-FO; BA-TI-MAT CFTC; CFE-CGC BTP (SICMA)	

HR	No social dialogue bodies					
HU	Mining Sectoral Dialogue Committee (Bányaipari Ágazati Párbeszéd Bizottság)	Sectoral social dialogue: mining	Bipartite	Statutory	BDSZ	MBSZ
IE	No social dialogue bodies					
IT	No social dialogue bodies					
LT	No social dialogue bodies					
LU	No social dialogue bodies					
LV	No social dialogue bodies					
MT	BICC	To monitor the building industry and to advise policymakers on ways to enhance the industry as a strong social and economic contributor to improve sustainable development.	Tripartite	Agreement	GWU; Union of United Workers (UHM); Forum Unions Malta (For.U.M.)	Malta Chamber of Small and Medium Enterprises (GRTU); Federation of Building and Civil Engineering Contractors (FOBC); Malta Chamber of Commerce Enterprise and Industry (MCCEI); Federation of Estate Agents (FEA); Malta Development Association (MDA)
	Malta Council for Economic and Social Develop-ment (MCESD)	MCESD is an advisory council that issues opinions and recommendations to the Maltese government on matters of economic and social relevance.	Tripartite	Statutory	(GWU); Union of United Workers (UHM); Forum Unions Malta (For.U.M.); Confederation of Malta Trade Unions	Malta Employers Association (MEA); MCCEI; Malta Hotels and Restaurants Association (MHRA); GRTU
NL	Social and Economic Council (SER)	Advisory and research body, as well as forum for policy negotiations	Tripartite	Statutory	CNV; FNV; VCP	VNO-NCW; LTO
	Stichting van de Arbeid (StvdA)	National-level negotiation forum and advisory organisation	Bipartite	Agreement	CNV; FNV; VCP	VNO-NCW; LTO
PL	Tripartite Team for Social Security of Miners	Conducting a tripartite sectoral dialogue to reconcile the interests of the parties and implement government restructuring programmes and strategies for the hard coal mining industry – to maintain social peace	Tripartite	Agreement	SGiE NSZZ Solidarność; ZZG; PZZ Kadra; Trade Union of Lower Workers; Trade Union ‘Przeróbka’; Free Trade Union ‘Sierpień 80’; Trade Union of Mine Extraction Machines in Poland; Secretariat of Mining and Energy NSZZ ‘Solidarność 80’; National Section of Coal Mining of NSZZ ‘Solidarność’; Trade Union of Mining Rescuers in Poland; Trade Union ‘Mining	The representation consists of representatives of companies affiliated to GIPH.

					Unity'; Trade Union 'Kontra'	
	Tripartite Team for the Brown Coal Industry	Conducting a tripartite sectoral dialogue to reconcile the interests of the parties while developing a position on issues important from the point of view of the state's policy towards the lignite industry and the interests of employees and employers	Tripartite	Agreement	SGiE NSZZ Solidarność; (National Brown Coal Section); Federation of Brown Coal Mining Trade Unions; Brown Coal Section of the Alliance of Trade Unions 'Kadra'; National Mining Section of the National Association of Continuous Movement Workers' Union; Brown Coal Mining Section 'Solidarność 80'	PPWB
PT	Sectoral Tripartite Committees at the National Authority for Working Conditions (Autoridade para as Condições de Trabalho, ACT)	OSH			Feviccom	
RO	No social dialogue bodies					
SE	Gramko	OSH	Bipartite	Agreement	IF Metall; Unionen; SI; Ledarna	Svemin
SI	Economic and Social Committee for Energy	Legislation, sector specifics, privatisation	Tripartite	Agreement	Slovenian Energy Workers' Union (SDE)	EZS
SK	Economic and Social Council of the Slovak Republic (Hospo-dárska a sociálna rada SR, HSR SR)	Working conditions, wages and related social policy issues	Tripartite	Statutory	KOZ	APZ
	Industrial bipartite (Priemyselná bipartita)	OSH, social dialogue, working and social conditions of employees, employment conditions, as well as improving the business environment	Bipartite	Agreement	OZ PBGN	ZHŤPG
	Industry tripartite (Odvetvová tripartite)	Issues of the extractive industries – negotiations on the basis of the statute	Tripartite	Agreement	OZ PBGN	ZHŤPG

Source: *Network of Eurofound Correspondents, 2021*

2.7. Fragmentation and pluralism in the extractive industries sector

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

In the extractive industries sector, there is an average of 2.7 trade unions per country. The reasons for fragmentation and pluralism of trade unions in the different countries are shown in Table 29. The most common reason for there being more than one trade union in the sector is that different trade unions may share a sectoral domain but differ in terms of ideology. This is the case in 10 countries. In six countries, fragmentation is (entirely or partly) because the trade unions organise members in specific professions (for instance, engineers) or in different parts of the sector. Other reasons for fragmentation include that trade unions organise different categories of workers (for instance, only white- or blue-collar workers) (the case in five countries) and that they organise different parts of the country (the case in two countries).

Table 29: Reasons for fragmentation and pluralism of trade unions in the extractive industries sector, 2021

Member State	Trade unions have members in specific professions	Trade unions organise different categories of workers in the sector (blue-collar, white-collar, management, etc.)	Trade unions have members in different parts of the country	Trade unions have members in different types of companies, (cooperatives, private companies, self-employed workers, etc.)	Trade unions have members in different parts of the sector/ different types of activities	Trade unions differ in terms of ideology	Other reasons
AT							
BE							
BG							
CY							
CZ							Tradition
DE							
DK							
EE							
EL							
ES							
FI							
FR							
HR							
HU							
IE							
IT							
LT							
LU							
LV							
MT							
NL							Historic reasons (religion)
PL							
PT							
RO							
SE							
SI							
SK							

Source: *Data provided by the Network of Eurofound Correspondents, 2021*

As with the trade unions, there is an average of 2.7 employer organisations per Member State in the sector. Table 30 shows that the main reason for the fragmentation of interest representation on the employers' side is that the organisations have members in different parts of the sector or in different types of activity. This is the case in 17 Member States. Much less common is fragmentation due to regional coverage (the case in three countries), differences in size and ownership of the member companies (the case in one country) or differences in ideology (the case in two countries).

Table 30: Reasons for fragmentation and pluralism of employer organisations in the extractive industries sector, 2021

Member State	Employer organisations have members in different parts of the country	Employer organisations have members in different types of companies (cooperatives, private companies, self-employed workers, etc.)	Employer organisations have members in different parts of the sector/ different types of activities	Employer organisations differ in terms of ideology	Other reasons
AT					
BE					
BG					
CY					
CZ					
DE					
DK					Danske Råstoffer is affiliated to DI
EE					
EL					
ES					
FI					
FR					
HR					
HU					
IE					Business associations are representative bodies; one employer organisation is involved in collective bargaining
IT					
LU					
LT					
LV					
MT					
NL					
PL					
PT					
RO					
SE					
SI					
SK					

Source: *Data provided by the Network of Eurofound Correspondents, 2021*

3. European level of interest representation

This chapter presents detailed data on the representativeness of the European-level social partners in the extractive industries sector. All social partner organisations are listed by the European Commission as organisations to be consulted under Article 154 of the TFEU. The European organisation representing the trade unions, and thus the workers of the sector, is IndustriAll Europe. The employers of the sector are represented at European level by Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, and APEP.

The representativeness of the social partners is assessed in three ways. First, the membership strength of the European-level social partner organisations on both sides is described, based on the membership domains covered by their national affiliates (in Section 3.1 for the trade unions and in Section 3.4 and on Section 3.7 for the employers). Second, their capacity to negotiate is analysed (in Section 3.8); this is their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide. This capacity to negotiate is affected by the involvement of their affiliates in collective bargaining at national level, which ensures not only that they can provide an effective mandate for discussion and negotiation at European level, but also that they are in a position to implement European-level agreements. Third, their effective participation in ESSDC meetings is assessed (in Section 3.9).

Finally, the limits of the representativeness of social partners involved in the ESSDC for the extractive industries sector are assessed in two ways: first by looking at the national organisations not represented by the organisations involved in the ESSDC (in Section 3.2 and Section 3.5), and second by presenting the representativeness of any other European associations in the sector (in Section 3.3 and Section 3.6).

3.1. Membership domains of European-level trade union organisations

Membership domain of IndustriAll Europe

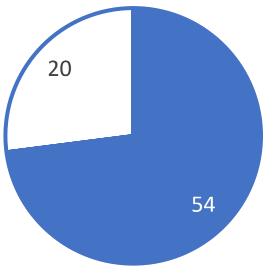
IndustriAll Europe is affiliated to the European Trade Union Confederation (ETUC) and represents workers in the metal, chemical, energy, mining, textile, clothing and footwear sectors across Europe.[24] As a multi-industry federation, the representational domain of IndustriAll Europe also covers the extractive industries sector under review here.

An overview of the membership of IndustriAll Europe is presented in Table 31. Of the 74 national trade unions in the sector, 54 trade unions (73%) are members of IndustriAll Europe. IndustriAll Europe has sector-related members in 20 Member States. In 11 countries, the trade union with most members in the extractive industries sector is affiliated to IndustriAll Europe.

[24] In the statutes of IndustriAll Europe, membership and affiliation are defined in Articles 7 and 8. Member trade unions are required to be democratic and independent, and affiliated to a national cross-sector trade union confederation that is affiliated to the ETUC. The executive committee takes membership-related decisions and can decide, with a two-thirds majority, to make an exception to the required affiliation for a cross-sector confederation that is a member of the ETUC. The statutes of IndustriAll Europe only provide for full membership. See Eurofound (2018).

Figure 16: Scoreboard of the representativeness of IndustriAll Europe

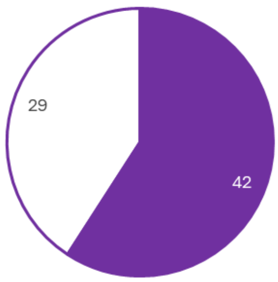
73% of trade unions with members in the sector are affiliated to IndustriAll Europe (54/74).



20 Member States have an IndustriAll Europe member.

AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

58% of trade unions involved in sector-related collective bargaining are affiliated to IndustriAll Europe (42/71).



In 19 Member States IndustriAll Europe has a member doing collective bargaining in the sector.

AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Source: *Network of Eurofound Correspondents, 2021*

IndustriAll Europe has members in all parts of the sector (as defined in this study). While the coverage rate varies, the members of IndustriAll Europe make up at least 50% of the trade unions active in each subsector.

Out of all IndustriAll Europe affiliates, 42 (93%) are involved in collective bargaining. The affiliates make up 57% of all sector-related trade unions involved in sector-level collective bargaining and 61% of all those involved in company-level bargaining. In all Member States where IndustriAll Europe has members, at least one of their members is involved in collective bargaining.

Table 31: Membership domain of IndustriAll Europe

Member State	Trade union	Parts of the sector covered												Involvement in collective bargaining		IndustriAll member	Ranking by share of sector-related members
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level		
AT	PRO-GE																n.d.
	GPA																2
BE	ABVV-FGTB ACCG																1
	ACV-CSC BIE																2
	CSC CNE																n.d.
	ACLVB-CGSLB																n.d.
BG	Syndical Miners Federation 'Podkrepa'																n.d.
	CITUB-FNSM-miners																n.d.
CZ	OS KOVO																3

DE	IG BCE	1
DK	CO-industri	n.d.
	IDA	n.d.
EL	PanHellenic Energy Federation (PEF) [25]	
ES	UGT-FICA	n.d.
	CCOO Industria	n.d.
	USO FI	n.d.
	ELA Industria eta Eraikuntza	n.d.
FI	TEK (affiliated to YTN)	5
	Insinööriliitto (affiliated to YTN)	4
	Teollisuusliitto	1
	Pro	3
	Sähköliitto	6
FR	CFE-CGC Energies	
	CFE-CGC Métallurgie – FCMTM	
	CFTC – Fédération Chimie, Mines, Textiles, Energie	
	Fédération CFE-CGC Enermine	
	Fédération nationale de l'Energie et des Mines CGT-FO	
	Fédération Nationale des Mines et de l'énergie – CGT	
	FGMM-CFDT	
	CFE-CGC BTP (SICMA)	n.d.
HR	SING	1
HU	BDSZ	1
IE	SIPTU	1
IT	Filctem CGIL	n.d.
	FEMCA CISL	n.d.
	Uiltec UIL	n.d.
LU	OGB-L	1
	LCGB-Indusid	2
NL	FNV	n.d.
	CNV[26]	n.d.
PL	SGiE NSZZ Solidarność	1
	ZZG	2
	PZZ Kadra	3
	SPCh NSZZ Solidarność	6
PT	Fiequimetal[27]	1
	STIM (part of Fiequimetal)	1
	SIMA	3
RO	FSGR (O-FS Gaz Romania)	1

[25] The organisations in red are member organisations of IndustriAll Europe participating in the ESSDC for the extractive industries sector. These organisations did not, however, provide information regarding their sector-relatedness to the Network for Eurofound Correspondents.

[26] CNV is likely to have members in the sector, but this has not been confirmed by the organisation.

[27] STIM is affiliated to Fiequimetal.

	IndustriAll BNS[28]																
SE	IF Metall																1
	SEF																4
	SI																3
	Unionen																2
EU 27	54 trade unions in 20 Member States form the membership domain in the sector of IndustriAll Europe in the EU27.	18 27 67%	28 38 74%	27 40 68%	27 47 57%	20 34 59%	23 38 61%	27 43 63%	22 38 58%	20 28 71%	13 19 68%	15 19 79%	18 32 56%	29 49 57%	36 59 61%		

Notes: *n.d. = no data. The numbers in green in the table for the EU27 correspond to the number of trade unions organising this part of the sector that are affiliated to IndustriAll Europe. The black number below is the total number of national trade unions organising this part of the sector. The percentages are the proportion of all trade unions in that part of the sector that are affiliated to IndustriAll Europe.*

Source: *Network of Eurofound Correspondents, 2021*

Table 32: Membership strength of IndustriAll Europe member unions

Member State	Trade union	Members	Work-force (%)	Trade union members (%)	Exact number	Estimate	Regional database	Estimate since not disclosed	Development	Largest
AT	PRO-GE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Stable	
	GPA	1,500	27.9	33.3	n/a	n/a	n/a	n/a	Stable	
BE	ABVV-FGTB ACCG	1,940	79	76.2					n/a	
	ACV-CSC BIE	845	34.6	23.8					n/a	
	CSC-CNE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
	ACLVB-CGSLB	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
BG	Syndical Miners Federation 'Podkrepa'	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Decreasing	
	CITUB-FNSM-miners	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Stable	
CZ	OS KOVO	61	0.3	0.4					Decreasing	
DE	IG BCE	21,209	44.8	100.0					Decreasing	
DK	CO-industri	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Stable	
	IDA	28	0.9	100.0					Stable	n/a
ES	UGT-FICA	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Decreasing	
	CCOO Industria	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Decreasing	
	USO FI	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Decreasing	
	ELA Industria eta Eraikuntza	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Stable	n/a
FI	TEK (affiliated to YTN)	53	0.7	1.3					Stable	
	Insinööriliitto (affiliated to YTN)	57	0.8	1.4					Stable	
	Teollisuusliitto	1,850	25.1	43.9					n/a	

[28] FSGR (O-FS Gaz Romania) and IndustriAll BNS (Former FSLI Metal) are both member unions of IndustriAll Europe and involved in the ESSDC for the extractive industries, but these trade unions have not provided information on their active members in the extractive industries sector.

Member State	Trade union	Members	Work-force (%)	Trade union members (%)	Exact number	Estimate	Regional database	Estimate since not disclosed	Development	Largest
	Pro	1,000	13.6	23.8					n/a	
	Sähköliitto	50	0.7	1.2					n/a	
FR	CFE-CGC Energies[29]									
	CFE-CGC Métallurgie – FCMTM									
	CFTC – Fédération Chimie, Mines, Textiles, Energie									
	Fédération CFE-CGC Enermine									
	Fédération nationale de l'Energie et des Mines CGT-FO									
	Fédération Nationale des Mines et de l'énergie – CGT	60								
	FGMM-CFDT									
	CFE-CGC BTP (SICMA)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
HR	SING	300	15.4	66.7					Decreasing	
HU	BDSZ	1,951	50.5	100.0					Stable	
IE	SIPTU	>1,000							Stable	
IT	Filctem CGIL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Stable	
	FEMCA CISL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Stable	
	Uiltec UIL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Stable	
LU	OGB-L	0.6	0.2						Increasing	
	LCGB-Indusid	0.4	0.2						Stable	
NL	FNV	n/a	n/a	n/a					Decreasing	
	CNV	1,960	34.9	100.0					n/a	
PL	SGiE NSZZ Solidarność	43,000	35.9	52.4					Decreasing	
	ZZG	25,000	20.9	30.5					Decreasing	
	PZZ Kadra	11,243	9.4	13.7					Decreasing	
	SPCh NSZZ Solidarność	400	0.3	0.5					Stable	
PT	Fiequimetal	1,000	10.4	33.3					n/a	
	STIM (part of Fiequimetal)	1,000	10.4	33.3					n/a	
	SIMA	<350							Stable	
RO	FSGR	14,600	76.4	84.4					Decreasing	

[29] The organisations in red are member organisations of IndustriAll Europe participating in the ESSDC for the extractive industries sector. These organisations did not, however, provide information regarding their sector-relatedness to the Network for Eurofound Correspondents.

Member State	Trade union	Members	Work-force (%)	Trade union members (%)	Exact number	Estimate	Regional database	Estimate since not disclosed	Development	Largest
SE	IF Metall	6,903	300[30]	80.9	■				Increasing	■
	SEF	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
	SI	583	25.3	6.8	■				Increasing	
	Unionen	1,051	45.5	12.3	■				n/a	

Note: *n/a = not applicable.*

Source: *Network of Eurofound Correspondents, 2021*

3.2. National trade unions not represented by the ESSDC

In 16 Member States, there are trade unions that are not affiliated to IndustriAll Europe and thus not represented on the ESSDC. Table 33 gives an overview of these organisations.

The 30 unrepresented trade unions are all involved in collective bargaining, either at sector level or at company level (or both). The trade unions are fairly widespread in terms of sectoral coverage. The coverage rate varies, and the unaffiliated trade unions make up between 21% and 44% of the trade unions active in each subsector.

In eight countries (Austria, Cyprus, Czechia, Greece, France, Lithuania, Slovakia and Slovenia), the trade union with the most members in the sector is not affiliated to IndustriAll Europe.

Table 33: Characteristics of extractive industries sector trade unions not represented on the ESSDC

Member State	Trade union	Parts of the sector covered												Involve-ment in collective bargaining		European affiliations	Ranking by share of sector-related members
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level		
AT	GBH			■	■		■	■	■		■		■	■		EFBWW	1
CY	Oikodomoi-PEO		■	■	■	■	■	■	■				■	■	■		2
	OOIM-SEK		■	■	■	■	■	■	■				■	■	■	EFBWW	1
	DEOK		■		■				■				■		■		3
CZ	OS PHGN	■		■	■	■	■	■	■				■	■			1
	OSEH	■		■										■	■		2
DE	IG BAU				■	■	■	■	■				■	■	■		n.d.
EL	OME	■	■			■		■		■			■	■			1
	Ochmee	■	■	■	■	■	■	■	■	■	■	■	■	■			2
	GFWECI				■	■								■		EFBWW	3
ES	CIG Industria	■		■	■		■	■	■	■				■	■		n.d.

[30] The reported number of IF Metall members in the sector is three times more than the number of sectoral employees in Sweden. This may be due to a different (wider) understanding of the scope of the sector, including also members outside the scope of the sector as defined in this study, as seen in Table 2.

Member State	Trade union	Parts of the sector covered: 5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Involvement in collective bargaining: Sector level	Company level	European affiliations	Ranking by share of sector-related members
FI	YTN[31]																n/a
	Rakennusliitto																2
FR	BA-TI-MAT CFTC															EFBWW	n.d.
	FNCB-CFDT															EFBWW	n.d.
	FG-FO															EFBWW	n.d.
	FNSCBA-CGT															EFBWW	1
HR	SGH															EFBWW	2
IE	Unite																2
	Connect																2
LT	LBMAĮDPS																1
PL	SBiPD NSZZ Solidarność															EFBWW	5
	Budowlani															EFBWW	4
PT	Feviccom																3
RO	FNS Salroca																2
	FNME																3
SI	SPESS																1
	SDRES																2
	ZSSS-KNG																3
SK	OZ PBGN																1
EU 27	30 sector-related trade unions in 16 Member States are unaffiliated to the ESSDC.	9 27 33%	10 38 26%	13 40 33%	20 47 43%	14 34 41%	15 38 39%	16 43 37%	16 38 42%	8 28 29%	6 19 32%	4 19 21%	14 32 44%	21 49 43%	23 59 39%		

Notes: *n/a = not applicable; n.d. = no data. The numbers in green in the table for the EU27 correspond to the number of trade unions organising this part of the sector that are not affiliated to IndustriAll Europe. The black number below is the total number of national trade unions organising this part of the sector. The percentages are the proportion of all trade unions in that part of the sector that are unaffiliated to IndustriAll Europe.*

Source: *Network of Eurofound Correspondents, 2021*

Table 34: Membership strength of extractive industries sector trade unions not represented on the ESSDC

Member State	Trade union	Members	Work-force (%)	Trade union members (%)	Exact number	Estimate	Regional database	Estimate since not disclosed	Development	Largest
AT	GBH	3,000	55.8	66.7					Decreasing	Yes
CY	Oikodomoi-PEO	81		29.9					Decreasing	No
	OOIM-SEK	160		59.0					Decreasing	Yes
	DEOK	30		11.1					Stable	No
CZ	OS PHGN	11,000	54.2	81.1					Decreasing	Yes

[31] YTN is the negotiating organisation; Insinööriliitto and TEK are members. Thus, their ranking by membership size is irrelevant.

	OSEH	2,500	12.3	18.4					Stable	No
DE	IG BAU	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Stable	No
EL	OME	1,800	33.8	60.0					Increasing	Yes
	Ochmee	2,000	37.6	66.7					Stable	No
	GFWECI	200	3.8	6.7					Stable	No
ES	CIG Industria	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Decreasing	n/a
FI	YTN (negotiating organisation; Insinööriliitto and TEK are members)	110	1.5	2.6					Stable	No
	Rakennusliitto	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	No
FR	BA-TI-MAT CFTC	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	No
	FNCB-CFDT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	No
	FG-FO	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	No
	FNSCBA-CGT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Yes
HR	SGH	150	7.7	33.3					Decreasing	No
IE	Unite	<500							Stable	No
	Connect	<500							Stable	No
LT	LBMAĮDPS	40	1.6	100.0					Stable	Yes
PL	SBiPD NSZZ Solidarność	1,160	1.0	1.4					Decreasing	No
	Budowlani	1,200	1.0	1.5					Decreasing	No
PT	Feviccom	700	7.3	23.3					n/a	No
RO	FNS Salroca	1,400	7.3	8.1					Decreasing	No
	FNME	1,300	6.8	7.5					Decreasing	No
SI	SPESS	800		71.1					Stable	Yes
	SDRES	300		26.7					Decreasing	No
	ZSSS-KNG	25		2.2					Stable	No
SK	OZ PBGN	2,260	81.7	100.0					Decreasing	Yes

Note: *n/a = not applicable.*

Source: *Network of Eurofound Correspondents, 2021*

3.3. Other European trade union associations

Most Member States have no, or relatively few, affiliations with European associations other than IndustriAll Europe. The most common alternative or complementary affiliation is to the European Federation of Building and Woodworkers (EFBWW), which is the case for 11 trade unions in six countries. This is to be expected given that there is a significant sectoral overlap, with almost 60% of trade unions in extractive industries also having members in the construction sector (as shown in Figure 9). But in only 1 of the 11 cases is the trade union a member of both EFBWW and IndustriAll Europe. In other words, almost all trade unions in the sector affiliated to EFBWW are not represented on the ESSDC for the extractive industries sector.

Other European associations with members in the extractive industries sector include UNI Europa, EFFAT, FEANI, CESI and EPSU. However, all national trade unions affiliated to these organisations are also members of IndustriAll Europe.

Table 35: Other EU associations with extractive industries sector national trade unions as members, 2021

Abbreviation	Full name	Assessment of sector-relatedness	Member States with an affiliate according to organisation websites	Member States with an extractive industries sector affiliate
CESI	The European Confederation of Independent Trade Unions	Most of CESI's affiliates are employed in the fields of central, regional and local administration; security and justice; education, training and research; healthcare; postal services and telecommunications; defence; and transport.	15	1 (NL)
EFBWW	The European Federation of Building and Woodworkers	The EFBWW has members in building, woodworking, forestry, and allied industries and trades. Many trade unions in the extractive industries also have members in construction.	27	6 (AT, CY, EL, FR, HR, PL)
EFFAT	The European Federation of Trade Unions in the Food, Agriculture, and Tourism sectors and allied branches	EFFAT represents workers in the food, agriculture, tourism and domestic work sectors as well as other related sectors, services and activities in Europe.	27	3 (AT, DK, ES)
EPSU	The European Federation of Public Service Unions	EPSU represents 8 million public service workers across Europe.	27	1 (RO)
FEANI	The European Federation of National Engineering Associations	FEANI is a federation of professional engineers that unites national engineering associations.	27	2 (DK, SE)
UNI Europa	UNI Europa	UNI Europa is the European trade union federation for service workers.	27	4 (AT, DK, IE, SE)

Sources: *Data provided by the Network of Eurofound Correspondents, 2021; and websites of the respective organisations*

3.4. Membership domains of European-level employer organisations

Employers in the extractive industries sector are represented on the ESSDC by Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, and APEP. The membership domain of each of these organisations is presented separately in this chapter.

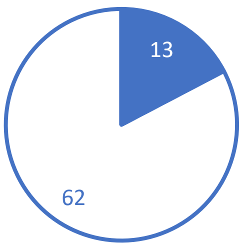
Membership domain of Euromines

Euromines is the recognised representative of the European metals and minerals mining industry. Euromines represents large and small companies and subsidiaries in Europe and in other parts of the world with an aggregated employment of over 350,000 people. Through the activities and operations of these members, more than 54 different metals and minerals are produced.[32]

Table 36 and Table 37 present an overview of the national employer organisations affiliated to Euromines. The directly affiliated companies are listed in Table 38. Of the 75 national employer organisations involved in the extractive industries sector, 13 (17%) are members of Euromines. Euromines has sector-related employer organisations as members in 12 Member States. In eight countries, the employer organisation with most members in the extractive industries sector is affiliated to Euromines.

Figure 17: Scoreboard of the representativeness of Euromines

17% of employer organisations with members in the sector are affiliated to Euromines (13/75).	12 Member States have an employer organisation affiliated.	14% of trade unions involved in sector-related collective bargaining are affiliated to Euromines (6/42).	In 6 Member States Euromines has a member doing collective bargaining in the sector.



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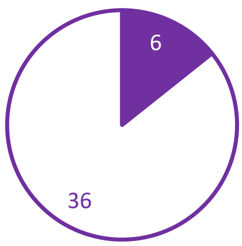
EE	LT	SI
EL	LU	SK



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DK	IT	SE
EE	LT	SI
EL	LU	SK

Notes: *In Ireland, the Netherlands and Romania, Euromines has no employer organisation, but does have companies directly affiliated. These Member States are marked in grey in the scoreboard. Luxembourg is marked red because there is no employer organisation or affiliate in that country.*

Source: *Authors' calculations based on data received from the Network of Eurofound Correspondents, 2021*

Euromines has employer organisation members in all parts of the sector except for peat production. The coverage rate varies considerably between the subsectors, but in absolute terms the most common activities for their members to cover are metal minerals and construction minerals. In metal minerals and fertilisers, the members of Euromines make up more than half of the active employer organisations.

Table 38 presents an overview of Euromines' company members, 14 in total. In three countries where Euromines has no employer organisations as members, they have companies with direct membership.

Out of all Euromines affiliates in the extractive industries sector (both employer organisations and companies included), 19 (70%) are involved in collective bargaining. Among employer organisations, the members of Euromines make up 15% of those involved in collective bargaining. In 12 Member States, Euromines has at least one employer organisation or company member involved in collective bargaining.

[32] For more information on Euromines, see https://euromines.org/about-euromines/

Table 36: Membership domain of Euromines – Employer organisations

Member State	Employer organisation	Parts of the sector covered												Involvement in collective bargaining		Affiliations					Ranking by share of sector-related employment
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP	
AT	FBS																				2
BG	Bulgarian Chamber of Mining and Geology																				1
CZ	Těžební unie																				2
DE	VKS																				3
DE	VRB																				1
EL	GMEA																				1
ES	Confedem																				2
FI	FinnMinn																				1
HU	MBSZ																				1
PL	Polska Miedź																				n.d.
PT	ANIET																				1
SE	Svemin																				1
SK	SBK																				1
EU 27	13 employer organisations in 12 Member States form the employer organisation membership domain in the sector of Euromines.	6 17 35 %	11 17 65 %	3 16 19 %	9 43 21 %	3 23 13 %	6 30 20 %	7 26 27 %	7 28 25 %	7 13 54 %	0 6 0%	2 7 29 %	5 16 31 %	5 38 13%	2 7 29%	Three employer organisation members of Euromines are also affiliated to other sector-related associations.					

Notes: *n.d. = no data. The orange cells indicate European affiliation, the green cells indicate the membership domain of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining.*

Source: *Network of Eurofound Correspondents, 2021*

Table 37: Membership strength of Euromines member organisations

Member State	Name (abbreviation)	Members	Exact number	Estimate	Regional database	Not disclosed	Development	Sectoral workforce	Largest	Second largest	Third largest
AT	FBS	58					Stable	n/a			
BG	Bulgarian Chamber of Mining and Geology	30					Increasing	>50%			
CZ	Těžební unie	23					Stable	17,000			
DE	VKS	7					Decreasing	19%			
	VRB	n/a	n/a	n/a	n/a	n/a	Stable	50%			
EL	GMEA	29					Stable	12,000			
ES	Confedem	32	n/a	n/a	n/a	n/a	Increasing	20%			

FI	FinnMinn	15					Increasing	100%			
HU	MBSZ	65					Stable	n/a			
PL	Polska Miedź	11					Stable	10%			
PT	ANIET	100					n/a	16%			
SE	Svemin	33	n/a	n/a	n/a	n/a	Stable	99%			
SK	SBK	46					Stable	80%			

Notes: *n/a = not applicable. There are three Member States where Euromines has no affiliated employer organisations, but instead has companies directly affiliated. These three additional Member States, where Euromines has company members only, are Ireland, the Netherlands and Romania.*

Source: *Network of Eurofound Correspondents, 2021*

Table 38: Membership domain of Euromines – Companies

Member State	Company name	Parts of the sector covered												Involvement in collective bargaining	Affiliations				
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other		Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
AT	Salinen																		
BG	Dundee Precious Metals Inc.																		
EL	Eldorado Gold Corp.																		
ES	MGR																		
ES	MAGNA																		
FI	AEF																		
IE	Boliden Tara Mines																		
NL	Nedmag B.V.																		
PL	KGHM Polska Miedź																		
PT	Somincor																		
RO	National Salt Company																		
SE	Boliden																		
SE	LKAB																		
SE	Lundin Mining																		
EU 27	14 companies in 11 Member States form the company membership domain in sector of Euromines in the EU27.	0	10	0	0	0	0	1	0	0	0	3	2	13	Four company members of Euromines are also affiliated to other sector-related associations.				

Notes: *The orange cells indicate European affiliation, the green cells indicate the membership domain of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining.*

Source: *Network of Eurofound Correspondents, 2021*

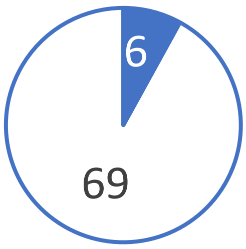
Membership domain of Euracoal

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 Treaty establishing the European Coal and Steel Community (ECSC).

Table 39 and Table 40 present an overview of the membership of Euracoal. Of the 75 national employer organisations involved in the extractive industries sector, six (8%) are members of Euracoal. Euracoal has sector-related employer organisations as members in four Member States. In three countries, the employer organisation with most members in the extractive industries sector is affiliated to Euracoal.

Figure 18: Scoreboard of the representativeness of Euracoal

8% of employer organisations with members in the sector are affiliated to Euracoal (6/75).	4 Member States have a Euracoal member.	10% of employer organisations involved in sector-related collective bargaining are affiliated to Euracoal (4/42).	In 3 Member States Euracoal has a member doing collective bargaining in the sector.



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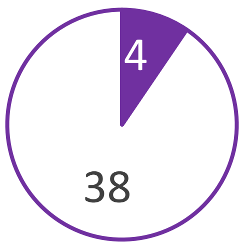
EE	LT	SI
EL	LU	SK



AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Notes: *The blue marked Member States are those where Euracoal has an affiliated employer organisation. The purple marked Member States are those where there is a member involved in collective bargaining or setting working conditions of the sectoral workforce. Euracoal has directly affiliated member companies in Bulgaria, Greece, Spain, Slovakia and Slovenia (marked in grey). Greece and Slovenia are marked grey because Euracoal does not have an affiliated employer organisation but has directly affiliated companies. Luxembourg is marked red because there is no employer organisation or affiliate in that country.*

Source: *Authors' calculations based on data received from the Network of Eurofound Correspondents, 2021*

Euracoal has employer organisation members in all parts of the sector except for peat and fertiliser production. In both absolute and relative terms, Euracoal's coverage rate is the highest in the hard coal and lignite subsector, where its member share of the sector amounts to 35% of the active employer organisations.

Table 41 presents an overview of Euracoal's company members, eight in total. In five countries where Euracoal has no employer organisations as members, it has affiliated companies with direct membership. The five Member States where Euracoal only has affiliated companies are marked in grey on the left panel above in Figure 18, and the blue marked Member States indicate where there is an affiliated sectoral employer organisation.

Out of all Euracoal affiliates in the extractive industries sector (both employer organisations and companies included), 10 (71%) are involved in collective bargaining. Among employer organisations, the members of Euracoal make up 10% of those involved in collective bargaining. In seven Member States, Euracoal has at least one employer organisation or company member involved in collective bargaining. This is the case for Czechia, Germany, Greece, Poland, Spain, Slovakia and Slovenia.

Table 39: Membership domain of Euracoal – Employer organisations

Member State	Employer organisation	Parts of the sector covered												Involvement in collective bargaining		Affiliations					Ranking by share of sector-related employment
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP	
CZ	ZSDNP	X			X	X	X	X	X					X			X				1
DE	Debriv	X		X										X			X				2
DE	BSN	X													X		X				n.d.
PL	PPWB	X												X			X				1
PL	GIPH	X					X										X				2
RO	PAT RO MIN	X	X	X								X	X				X				1
EU 27	6 employer organisations in 4 Member States form the employer organisation membership domain in the sector of Euracoal in the EU27.	6 17 35%	2 17 12%	2 16 13%	2 43 5%	1 23 4%	2 30 7%	2 26 8%	2 28 7%	0 13 0%	0 6 0%	1 7 14%	1 16 6%	3 38 8%	1 7 14%						

Notes: *n.d. = no data. The orange cells indicate European affiliation, the green cells indicate the membership domain of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining.*

Source: *Network of Eurofound Correspondents, 2021*

Table 40: Membership strength of Euracoal member organisations

Member State	Name (abbrev.)	Members	Exact number	Estimate	Regional database	Not disclosed	Development	Sectoral workforce (%)	Largest	Second largest	Third largest
CZ	ZSDNP	10	X				Stable	40	X		
DE	Debriv	10	X				Stable	32		X	
DE	BSN	6	X				n/a	n/a	n/a	n/a	n/a
PL	PPWB	11	X				Decreasing	n/a	X		
PL	GIPH	14		X			Stable	60		X	
RO	PAT RO MIN	n/a	X				Stable	90	X		

Note: *n/a = not applicable.*

Source: *Network of Eurofound Correspondents, 2021*

Table 41: Membership domain of Euracoal – Companies

Member State	Company name	Parts of the sector covered: 5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Involvement in collective bargaining	Affiliations: Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
BG	Mini Maritsa Iztok EAD																		
DE	DMT																		
EL	PPC DEI																		
ES	Subterra Ingeniera																		
PL	PGG																		
PL	Lubelski Węgiel 'Bogdanka'																		
SI	Premogovnik Velenje																		
SK	HBP																		
8 companies in 7 Member States form the company membership domain in the sector of Euracoal in the EU27.		8	1	0	0	0	0	0	0	0	0	0	0	6	No company members of Euracoal are affiliated to other sector-related associations.				

Notes: *The orange cells indicate European affiliation, the green cells indicate the membership domain of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining.*

Source: *Network of Eurofound Correspondents, 2021*

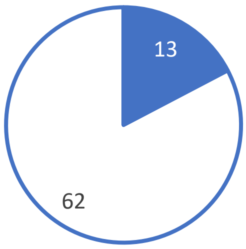
Membership domain of IMA-Europe

IMA-Europe is an umbrella organisation that brings together a number of European associations specific to individual minerals: ground calcium carbonate, precipitated calcium carbonate, dolomite, andalusite, bentonite, borates, diatomite, feldspar, kaolin, lime, mica, plastic clays, sepiolite, silica, talc and vermiculite.

Table 42 and Table 43 present an overview of the national sectoral employer organisations affiliated to IMA-Europe, while Table 44 adds the affiliated companies. Of the 75 national employer organisations involved in the extractive industries sector, 13 (17%) are members of IMA-Europe. IMA-Europe has sector-related employer organisations as members in nine Member States. In four countries, the employer organisation with most members in the extractive industries sector is affiliated to IMA-Europe.

Figure 19: Scoreboard of the representativeness of IMA-Europe

17% of employer organisations with members in the sector are affiliated to IMA-Europe (13/75).	9 Member States have an IMA-Europe member.	17% of employer organisations involved in sector-related collective bargaining are affiliated to IMA-Europe (7/42).	In 7 Member States IMA-Europe has an affiliated employer organisation doing collective bargaining in the sector.



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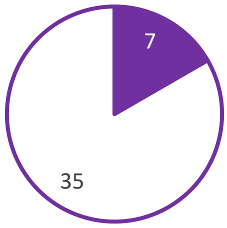


AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Notes: *The blue marked Member States are those where IMA-Europe has an affiliated employer organisation. The purple marked Member States are those where there is a member involved in collective bargaining or setting working conditions of the sectoral workforce. IMA-Europe has directly affiliated employer organisations in nine Member States. Eleven Member States are marked grey as IMA-Europe does not have an affiliated employer organisation but has directly affiliated companies. Some of the affiliated companies are multinationals operating in several Member States. For Croatia, Estonia, Hungary, Latvia, Lithuania, Luxembourg and Malta, it is not clear if any of the affiliated companies do have operations in those Member States. Luxembourg is red because there is no employer organisation for that country.*

Source: *Authors' calculations based on data received from the Network of Eurofound Correspondents, 2021*

IMA-Europe has employer organisation members in all parts of the sector. The lime production subsector has the most employer organisations among IMA-Europe's members, followed by construction minerals. In relative terms, IMA-Europe's highest coverage rate in terms of the proportion of affiliated organisations is in lime and the extraction of peat, where their member share of the sector amounts to 33% of the active employer organisations. In terms of production figures, expressed in tonnages, the main activities of IMA-Europe members are in construction minerals and industrial minerals.

Table 44 presents an overview of IMA-Europe's company members, 35 in total. In 11 countries where IMA-Europe has no employer organisations as members, it has companies with direct membership. Some of the affiliated companies, such as Imerys, Sibelco and Omya, are multinational companies that operate mineral sites in several European Member States. Table 44 only includes the operations in the home country, not the activities in other European Member States, as, despite their affiliation to IMA-Europe, these foreign operations do add up for the EU-wide representativeness of IMA-Europe.

Out of all of IMA-Europe's affiliates in the extractive industries sector (both employer organisations and companies included), 27 (56%) are involved in collective bargaining. Among employer organisations, the members of IMA-Europe make up 17% of those involved in collective bargaining. In 12 Member States, IMA-Europe has at least one employer organisation or company member involved in collective bargaining.

Table 42: Membership domain of IMA-Europe – Employer organisations

Member State	Employer organisation	Parts of the sector covered												Involvement in collective bargaining		Affiliations					Ranking by share of sector-related employment
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP	
AT	FSKI																				1
BE	Fediex																				1
CZ	SVVAPNO																				3
DE	BV Kalk																				n.d.
DE	BV MIRO																				n.d.
DE	BKRI																				n.d.
DK	DI																				1
ES	Ancade																				n.d.
ES	Carbunión																				
ES	Ibersil																				n.d.
FR	UP Chaux																				2
IT	Assorisorse																				1
PL	SPW																				n.d.
13 employer organisations in 9 Member States form the employer organisation membership domain in sector of IMA-Europe in the EU27.		2	1	2	6	4	10	5	5	2	2	2	2	7	0	Four employer organisation members of IMA-Europe are also affiliated to other sector-related associations.					
		17	17	16	43	23	30	26	28	13	6	7	16	38	0						
		12 %	6 %	13 %	14 %	17 %	33 %	19 %	18 %	15 %	33 %	29 %	13 %	18%	0%						

Notes: *n.d. = no data. The orange cells indicate European affiliation, the green cells indicate the membership domain of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining.*

Source: *Network of Eurofound Correspondents, 2021*

Table 43: Membership strength of IMA-Europe member organisations

Member State	Name (abbreviation)	Members	Exact number	Estimate	Regional database	Not disclosed	Development	Sectoral workforce	Largest	Second largest	Third largest
AT	FSKI	>50					Stable	60%			
BE	Fediex	60					n/a	n/a	n/a		
CZ	SVVAPNO	7					Stable	n/a			
DE	BV Kalk	50					n/a	5%			
	BV MIRO	800	n/a	n/a	n/a	n/a	Stable	n/a	n/a	n/a	n/a
	BKRI	42					Stable	2%			
DK	DI	15					Stable	90%			
ES	Ancade	15					Increasing	1,212			
	Ibersil	8					Stable	n/a	n/a	n/a	n/a
	Carbunión										

FR	UP Chaux	16	n/a	n/a	n/a	n/a	Stable	n/a			
IT	Assorisorse	97					Stable	n/a			
PL	SPW	7					Stable	n/a			

Note: *n/a = not applicable.*

Source: *Network of Eurofound Correspondents, 2021*

Table 44 lists the member companies that are directly affiliated to IMA-Europe in 16 Member States. There are 9 Member States where IMA-Europe has affiliated employer organisations and another 11 Member States where IMA-Europe does not have an affiliated employer organisation but does have directly affiliated companies. Together, this gives IMA-Europe some proven sector-related membership for 20 Member States. Some of the affiliated companies are multinationals operating in several Member States. For Croatia, Estonia, Hungary, Latvia, Lithuania, Luxembourg and Malta, it is not clear if any of the affiliated companies do have operations in those Member States. Such data have not been collected in the scope of this study.

Table 44: Membership domain of IMA-Europe – Companies

Member State	Company name	Parts of the sector covered												Involvement in collective bargaining	Affiliations				
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other		Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
BG	Kaolin AD																		
CY	Peletico Ltd																		
CZ	Sedlecky kaolin, a.s.																		
CZ	LB Minerals, s.r.o.																		
DE	CyPlus																		
DE	Clariant Produkte GmbH																		
DE	VKD																		
DK	FAXE Kalk																		
EL	Imerys Greece																		
ES	Cavisa																		
ES	MGR																		
ES	Sepiolsa																		
ES	MAGNA																		
ES	Sibelco Minerales S.A.																		
ES	Cales de Llierca																		
ES	Grupo SAMCA																		
ES	MYTA SA																		
ES	Arcillas y Feldespatos Río Pirón																		
ES	Incusa																		
ES	Tolsa																		
ES	Cales de Llierca																		
FI	Nordkalk																		
IE	Clogrennane Lime Ltd																		
IT	Unicalce																		
IT	Lvaiosa Chimica Mineraria SpA																		
NL	Sibelco Europé Minerals Plus																		
PT	Adelino Duarte da Mota																		

Member State	Company name	Parts of the sector covered												Involvement in collective bargaining	Affiliations				
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other		Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
PT	Sibelco Portuguesa				X												X		
RO	S.C. Omya Calcita S.R.L.				X												X		
RO	National Salt Company											X		X	X		X		
SE	LKAB		X											X	X		X		
SE	Sibelco Nordic				X			X						X			X		
SE	SMA						X							X			X		
SI	Calcit				X	X		X	X	X		X	X				X		
SK	Carmeuse	X												X			X		
35 companies in 16 Member States form the company membership domain in the sector of IMA-Europe in the EU27.		1	4	1	16	2	10	20	1	4	0	2	7	20	Four company members of IMA-Europe are also affiliated to other sector-related associations.				

Source: *Network of Eurofound Correspondents, 2021*

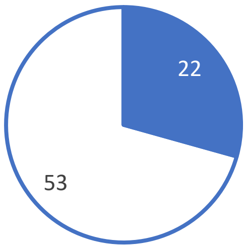
Membership domain of Aggregates Europe – UEPG

UEPG stands for Union Européenne des Producteurs de Granulats (European Aggregates Association in English and Europäischer Gesteinsverband in German). Aggregates covered by Aggregates Europe – UEPG are sand, gravel (including marine aggregates), crushed rock, and recycled and manufactured aggregates.

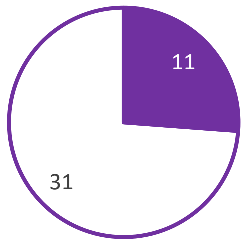
Table 45 and Table 46 present an overview of the membership of Aggregates Europe – UEPG. Of the 75 national employer organisations involved in the extractive industries sector, 22 (29%) are members of Aggregates Europe – UEPG. It has sector-related employer organisations as members in 17 Member States. The Polish organisation PZPK ended its membership in 2013, and the Greek Mining Association joined in 2024. In eight countries, the employer organisation with most members in the extractive industries sector is affiliated to Aggregates Europe – UEPG.

Figure 20: Scoreboard of the representativeness of Aggregates Europe – UEPG

29% of employer organisations with members in the sector are affiliated to Aggregates Europe – UEPG (22/75).	17 Member States have an Aggregates Europe – UEPG member.	26% of employer organisations involved in sector-related collective bargaining are affiliated to Aggregates Europe – UEPG (11/42).	In 10 Member States, Aggregates Europe – UEPG has a member doing collective bargaining in the sector.



AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK



AT	ES	LV
BE	FI	MT
BG	FR	NL
CY	HR	PL
CZ	HU	PT
DE	IE	RO
DK	IT	SE
EE	LT	SI
EL	LU	SK

Notes: *The blue marked Member States are those where Aggregates Europe – UEPG has an affiliated employer organisation. The purple marked Member States are those where there is a member involved in collective bargaining or setting working conditions of the sectoral workforce. For Estonia and Luxembourg, Aggregates Europe – UEPG does not have an affiliated employer organisation but has directly affiliated companies. This is why those two Member States are marked grey, because of the companies affiliated from those countries. Luxembourg is red, as there is no employer organisation.*

Source: *Authors' calculations based on data received from the Network of Eurofound Correspondents, 2021*

Aggregates Europe – UEPG has employer organisation members in all parts of the sector. In absolute terms, their coverage rate is the highest in the construction minerals subsector. The coverage rates of the other associations represented on the ESSDC are highest in the construction minerals, aggregates from recycling and ornamental stone subsectors, where their member share of the sector amounts to around 40% of the active employer organisations.

Table 47 presents an overview of Aggregates Europe – UEPG's company members, three in total. In two countries where Aggregates Europe – UEPG has no employer organisations as members, it has companies with direct membership.

Out of all Aggregates Europe – UEPG's affiliates in the extractive industries sector (both employer organisations and companies included), 12 (48%) are involved in collective bargaining. Among employer organisations, the members of Aggregates Europe – UEPG make up 26% of those involved in collective bargaining. In 10 Member States, Aggregates Europe – UEPG has at least one employer organisation or company member involved in collective bargaining.

Since the beginning of this representativeness study, several changes to the membership structure have occurred within the organisation. First, on 1 January 2024, the Greek Mining Enterprise Association (GMEA) joined Aggregates Europe – UEPG as a full member (the association is also a member of Euromines). For this reason, Lafarge Beton Greece stopped being a direct company member of Aggregates Europe – UEPG, and continued being active through the GMEA, to which Lafarge Beton Greece is affiliated. That reduces the number of associated company members from three down to two, one each from Estonia and Luxembourg. In addition, the Polish organisation PZPK is no longer a member of Aggregates Europe – UEPG (as of 2024).

Table 45: Membership domain of Aggregates Europe – UEPG – Employer organisations

Member State	Employer organisation	Parts of the sector covered												Involvement in collective bargaining		Affiliations					Ranking by share of sector-related employment
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level	Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP	
AT	FSKI																				1
BE	Fediex																				1
CY	CAPA																				1
CY	ΟΣΕΟΚ																				
DE	BV MIRO																				n.d.
DK	Danske Råstoffer																				1
DK	DI																				1
EL	*GMEA*																		Since 2024		
ES	FdA																				n.d.
FI	RT																				2
FI	Infra ry																				n.d.
FR	Unicem																				1
FR	UNPG																				n.d.
HU	MBSZ																				1
IE	ICF																				1
IT	Anepla																				2
NL	Cascade																				1
PL	~~PZPK~~[33]																				~~3~~
PT	ANIET																				2
RO	PPAM																				2
SE	SMBI																				2
SK	SZVK																				2
SK	SBK																				1
22 employer organisations in 17 Member States form the employer organisation membership domain in the sector of Aggregates Europe – UEPG in the EU27.		1	3	3	19	9	9	7	11	2	2	1	5	10	1	7 employer organisation members of Aggregates Europe – UEPG are also affiliated to other sector-related associations.					
		17	17	16	44	23	30	26	28	13	6	7	16	38	7						
		6 %	18 %	19 %	43 %	39 %	30 %	27 %	39 %	15 %	33 %	14 %	31 %	26%	14%						

Notes: *n.d. = no data. The orange cells indicate European affiliation, the green cells indicate the membership domains of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining. Changes in company status are marked in red. On 1 January 2024, the GMEA joined Aggregates Europe – UEPG as a full member. The association is also member of Euromines. When GMEA joined Aggregates Europe – UEPG, Lafarge Beton Greece stopped being a direct company member and continued being active through GMEA, of which Lafarge Beton Greece is a member. That reduces the number of associated company members from three down to two (one each from Estonia and Luxembourg). Since 2024, PZPK from Poland is no longer affiliated to Aggregates Europe – UEPG.*

Source: *Network of Eurofound Correspondents, 2021*

[33] Since 2024, PZPK is no longer a member of Aggregates Europe – UEPG.

Table 46: Membership strength of Aggregates Europe – UEPG member organisations

Member State	Name (abbreviation)	Members	Exact number	Estimate	Regional database	Not disclosed	Development	Sectoral workforce (%)	Largest	Second largest	Third largest
AT	FSKI	>50					Stable	60	1	0	0
BE	Fediex	60					n/a	n/a	n/a		
CY	CAPA	16					n/a	n/a			
CY	ΟΣΕΟΚ										
DE	BV MIRO	800	n/a	n/a	n/a	n/a	Stable	n/a	n/a	n/a	n/a
DK	Danske Råstoffer	43					Stable	80			
	DI	15					Stable	90			
ES	FdA	700					Stable	80–90% in NACE 8.1			
FI	RT	250					Increasing	60			
	Infra ry	15					n/a	n/a			
FR	Unicem	1,998					Decreasing	74			
	UNPG	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
HU	MBSZ	65					Stable	n/a			
IE	ICF	74					n/a	n/a			
IT	Anepla	50					Stable	n/a			
NL	Cascade	25					Stable	90% in NACE 8.1			
PL	~~PZPK~~[34]	40					Stable	25			
PT	ANIET	100					n/a	16			
RO	PPAM	28					Increasing	30			
SE	SMBI	100					Increasing	n/a			
SK	SZVK	38					Stable	65			
	SBK	46					Stable	80			

Note: *n/a = not applicable.*

Source: *Network of Eurofound Correspondents, 2021*

[34] Since 2024, PZPK is no longer a member of Aggregates Europe – UEPG.

Table 47: Membership domain of Aggregates Europe – UEPG – Companies

Member State	Company name	Parts of the sector covered													Involvement in collective bargaining	Affiliations				
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other			Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
EE	Kunda Nordic Tsement																			
EL*	Lafarge Beton Greece*																			
LU	Cloos SA																			
Three companies in three Member States form the company membership domain in the sector of Aggregates Europe – UEPG in the EU27.		0	0	0	3	1	1	2	1	0	0	0	1		1	None of Aggregates Europe – UEPG's company members are affiliated to other associations in the ESSDC.				

Notes: *The orange cells indicate European affiliation, the green cells indicate the membership domain of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining. * On 1 January 2024, the GMEA joined Aggregates Europe – UEPG as a full member. The association is also member of Euromines. When the GMEA joined Aggregates Europe – UEPG, Lafarge Beton Greece stopped being a direct company member and continued being active through the GMEA, of which it is a member. That reduces the number of associated company members from three down to two (one each from Estonia and Luxembourg). In December 2023, the company Mogotteaux joined Aggregates Europe – UEPG.*

Source: *Network of Eurofound Correspondents, 2021*

Membership domain of APEP

APEP stands for Association des Producteurs Européens de Potasse (European Potash Producers Association in English). APEP has no employer organisations as members. Instead, it has only companies as direct members, three in total in three Member States. An overview of APEP's membership domain in the sector is presented in Table 48.

The affiliates of APEP together cover five of the subsectors in extractive industries, namely construction minerals, industrial minerals, fertilisers, salt, and support activities for other mining and quarrying.

All of APEP's affiliates are involved in collective bargaining in the sector.

Table 48: Membership domain of APEP – Companies

Member State	Company name	Parts of the sector covered												Involvement in collective bargaining	Affiliations				
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other		Euromines	Euracoal	IMA-Europe	Aggregates Europe – UEPG	APEP
DE	K+S Kali GmbH																		
ES	ICL Iberia																		
FR	K+S KALI France																		
Three companies in three Member States form the membership domain in the sector of APEP in the EU27.		0	0	0	1	0	0	1	0	1	0	1	1	3	None of APEP's company members are affiliated to other associations in the ESSDC.				

Notes: *The orange cells indicate European affiliation, the green cells indicate the membership domain of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining.*

Source: *Network of Eurofound Correspondents, 2021*

3.5. National employer organisations not represented on the ESSDC

In 12 Member States, there are employer organisations that are not affiliated to Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, or APEP, and thus not represented on the ESSDC. Table 49 gives an overview of these organisations. Most of the 28 unrepresented employer organisations are involved in collective bargaining. Their sectoral coverage is quite broad but more than half of them are active in the subsector in construction minerals. Their highest relative coverage is in peat production, where the unaffiliated employer organisations make up 67% of all employer organisations. In five Member States (Croatia, Latvia, Malta, Slovakia and Slovenia) the employer organisation with the most members in the sector is not represented on the ESSDC.

Table 49: Characteristics of employer organisations not represented on the ESSDC

Member State	Employer organisation	Parts of the sector covered												Involvement in collective bargaining		European affiliation	Ranking by share of sector-related employment
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	Sector level	Company level		
AT	BIB				■	■	■	■	■	■	■			■			2
BE	Bedrijfsgroepering Zandgroeven			■	■			■						■			n.d.
BE	Fédération de l'Industrie des Carrières de Grès							■	■				■	■			n.d.
BE	Belgische Steenkoolfederatie	■												■			n.d.
BE	Union des Carrières et Scieries de Marbres de Belgique								■					■			n.d.
BE	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique				■				■					■			n.d.
BE	Bedrijfsgroepering der Limburgse Baggeraars				■									■			n.d.
DE	a-vero				■		■	■	■					■	■		n.d.
EE	EMTEL			■	■	■	■									European Federation of Explosives Engineers (EFEE)	n.d.
EE	Turbaliit										■					Growing Media Europe; International Peatland Society	n.d.
ES	ATEDY				■									■		Eurogypsum	n.d.
ES	Cominroc							■									1*
ES	Confevicex				■									■			n.d.
ES	Afasal											■		■			n.d.
ES	Aindex							■									n.d.
ES	Primigea		■					■									n.d.
FI	Koneyrittäjät ry										■			■			n.d.
FI	Kivi				■	■			■					■		Euroroc	n.d.
FI	Technology Industry Employers of Finland		■											■			3

HR	HUP UINGMRH																1
LV	BRA																2
LV	LKA															Growing Media Europe AISBL; Energy Peat Europe; International Peat Society	1
MT	MDA															Build Europe	1
SE	GAF															Eurometaux; Eurofer	1*
SI	GZS-ZKM															CAEF	3
SI	ZDS																1
SI	EZS															Eurelectric	2
SK	ZHŤPG																1
28 employer organisations in 12 Member States are actively involved in the extractive industries sector in the EU but not represented on the ESSDC.		4 17 24 %	4 17 24 %	6 16 38 %	15 43 35 %	7 23 30 %	7 30 23 %	9 26 35 %	9 28 32 %	3 13 23 %	4 6 67 %	2 7 29 %	5 16 31 %	18 38 47%	4 7 57%		

Notes: *n.d. = no data. The green cells indicate the membership domain of the organisations and the part of the sector that they cover, and the purple cells indicate the organisations that are involved in collective bargaining. * Membership shared with other, ESSDC-represented, organisations.*

Source: *Network of Eurofound Correspondents, 2021*

Table 50: Membership strength of the employer organisations not represented on the ESSDC

Member State	Name (abbreviation)	Members	Exact number	Estimate	Regional database	Not disclosed	Development	Sectoral workforce	Largest	Second largest	Third largest
AT	BIB	517					Stable	40%			
BE	Bedrijfsgroepering Zandgroeven	15	n/a	n/a	n/a	n/a	n/a	500	n/a	n/a	n/a
	Fédération de l'Industrie des Carrières de Grès	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Belgische Steenkoolfederatie	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Union des Carrières et Scieries de Marbres de Belgique	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Bedrijfsgroepering der Limburgse Baggeraars	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
DE	a-vero	600					n/a	n/a	n/a	n/a	n/a
EE	EMTEL	27					Increasing	n/a	n/a	n/a	n/a
	Turbaliit	27					Increasing	700	n/a	n/a	n/a
ES	ATEDY	27					Increasing	n/a			
	Cominroc	1					Increasing	n/a			

	Confevicex	3					Decreasing	n/a	n/a	n/a	n/a
	Afasal	14					Decreasing	n/a			
	Aindex	30					Stable	95% in industrial minerals	n/a	n/a	n/a
	Primigea	1					Increasing	n/a	n/a	n/a	n/a
FI	Koneyrittäjät ry	217					Decreasing	70% in peat extraction			
	Kivi	74					Stable	55% ornament al stone			
	Technology Industry Employers of Finland	6					Increasing	57%			
HR	HUP UINGMRH	60					Stable	25%			
LV	BRA	8					Increasing	n/a			
	LKA	9					Stable	80%			
MT	MDA	45					Increasing	90%			
SE	GAF	33					Stable	99%			
SI	GZS-ZKM	2					Stable	10%			
	ZDS	1					Stable	50%			
	EZS	1					Stable	50%			
SK	ZHŤPG	12					Stable	80%			

Note: *n/a = not applicable.*

Source: *Network of Eurofound Correspondents, 2021*

3.6. Other European-level organisations with sectoral employer organisations affiliated

Like the trade unions, most employer organisations in the sector have few or no affiliations to European associations other than Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, and APEP (see Table 51). Only in one case – the European Lime Association (EuLA) – do the listed organisations have an extractive industries member organisation in more than two Member States. However, as EuLA is in fact affiliated to IMA-Europe, this is not an indicator of a representation deficit of the organisations not included on the ESSDC.

Table 51: Other EU associations with extractive industries sector national employer organisations as members, 2021

Abbreviation	Full name	Assessment of sector-relatedness	Member States with an affiliate according to organisation websites	Member States with an extractive industries sector affiliate
BIBM	Federation of the European Precast Concrete Industry	BIBM is a European association that represents the interests of the precast concrete industry.	n.d.	1 (IE)
Build Europe	Build Europe	Build Europe is the umbrella organisation for national federations of developers and house builders.	11	1 (MT)
CAEF	The European Foundry Association	CAEF is an umbrella organisation of the European foundry industry.	18	1 (SI)
CCA-Europe (part of IMA-Europe)	European Calcium Carbonate Association	CCA-Europe is a non-profit association whose members cooperate on scientific and legislative issues of common interest related to calcium carbonate and dolomite.	11	1 (PL)
Cerame-Unie	The European Ceramic Industry Association	Cerame-Unie represents the European ceramic industry.	24	1 (AT)
Construction Products Europe	Construction Products Europe	Construction Products Europe is a European association that represents the interests of construction products manufacturers.	9	2 (AT, FI)
EFFE	European Federation of Explosives Engineers	European Federation of Explosives Engineers is a membership organisation with the aim of educating, unifying and improving working standards in the blasting and explosives industry across Europe.	19	1 (EE)
EPE	Energy Peat Europe	EPE represents the energy peat industry at EU level.	n.d.	1 (LV)
ERMCO	European Ready Mixed Concrete Organization	ERMCO is a European Association that represents the interests of ready-mixed concrete manufacturers.	15	1 (IE)

EuLA (part of IMA-Europe)	European Lime Association	EuLA is a sector-based representation for the European lime industry.	21	6 (CZ, DE, DK, ES, FR, PL)
Eurelectric	Eurelectric	Eurelectric is the sector association that represents the common interests of the electricity industry at pan-European level.	n.d.	1 (SI)
Eurofer	The European Steel Association	Eurofer represents the steel industry in Europe.	n.d.	2 (AT, SE)
Eurogypsum	Eurogypsum	Eurogypsum is a European federation representing the gypsum product manufacturing industry.	14	2 (AT, ES)
Eurometaux	The European Non-Ferrous Metals Association	Eurometaux is the association for non-ferrous metals producers and recyclers in Europe.	n.d.	2 (FI, SE)
Euroroc	European & International Federation of Natural Stone Industries	Euroroc is the umbrella organisation of the European natural stone associations.	11	2 (FI, FR)
Eurosil (part of IMA-Europe)	The European Association of Industrial Silica Producers	Eurosil is a non-profit association whose members cooperate on scientific and legislative issues of common interest related to silica.	6	1 (DE)
FIEC	European Construction Industry Federation	FIEC represents the interests of the European construction industry.	23	1 (FI)
Growing Media Europe AISBL	Growing Media Europe AISBL	Growing Media Europe AISBL is an international non-profit organisation representing the producers of growing media and soil improvers at European level.	15	2 (EE, LV)
IPS	International Peatland Society	The International Peatland Society is an organisation of individual, corporate and institutional members dedicated to the responsible management and wise use of peatlands and peat.	n.d.	2 (EE, LV)
KPC Europe (part of IMA-Europe)	European Kaolin and Plastic Clays Association	KPC-Europe is a non-profit association whose members cooperate on scientific and legislative issues of common interest related to kaolin and plastics clays.	n.d.	1 (DE)
Orgalim	Europe’s Technology Industry	Orgalim represents Europe’s technology industries at EU level.	18	1 (DK)

Note: *n.d. = no data.*

Sources: *Data provided by the Network of Eurofound Correspondents, 2021; and websites of the respective organisations*

3.7. Collective representativeness of Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, and APEP on the ESSDC, and comparative analysis between them

Table 52 presents the collective representativeness of the European employer organisations on the extractive industries ESSDC. As the landscape on the employers' side combines represented national employer organisations with individual companies, this does not allow a clear comparison in terms of membership strength. It does, however, make it possible to see the parts of the sector in which each organisation has the strongest membership base.

Euromines has the most activity (in terms of numbers of members involved) in metal minerals and construction minerals. In metal minerals and fertilisers, the members of Euromines make up more than half of the active employer organisations.

Euracoal and Euromines have the most activity in hard coal and lignite, where their member share of the sector each amounts to 35% of the active employer organisations.

Among IMA-Europe's members, the lime production subsector has the most national employer organisations. In relative terms, IMA-Europe's highest coverage rate in terms of affiliated organisations is in lime and peat production, where its member share of the sector amounts to 33% of the active employer organisations. In terms of tonnage of production, IMA-Europe members are the strongest in the production of construction minerals and industrial minerals.

In relation to the other associations represented on the ESSDC, Aggregates Europe – UEPG's coverage rate is high in construction materials, aggregates from recycling and ornamental stone, where its member share of the sector amounts to around 40% of the active employer organisations.

The three company affiliates of APEP together cover five of the subsectors in extractive industries, namely construction minerals, industrial minerals, fertilisers, salt, and support activities for other mining and quarrying.

Table 52: Comparative analyses of the representativeness of the European employer organisations with members in the extractive industries sector

Employer organisations	Type of affiliation/coverage	Parts of the sector covered												Employer organisation involvement in collective bargaining
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	
All employer organisations	Number of employer organisations covering this part of the sector: **75**	17	17	16	43	23	30	26	28	13	6	7	16	42 (56%)
Euromines	Number of employer organisations affiliated to Euromines: **13**	6	11	4	9	3	6	7	7	7	0	2	5	6 (46% of Euromines members)
	Share (%) of employer organisations that are affiliated to Euromines: **17%**	35	65	25	21	13	20	27	25	54	0	29	31	14% (of all employer organisations involved in collective

Employer organisations	Type of affiliation/coverage	Parts of the sector covered												Employer organisation involvement in collective bargaining
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	
														bargaining in the sector)
	Number of Member States with Euromines employer organisation affiliate(s): **12**	6	11	4	9	3	6	7	7	7	0	2	5	6
	Number of company members: **14**	0	10	0	0	0	0	1	0	0	0	3	2	13
	Number of Member States with Euromines employer organisation and/or company affiliate(s): **15**	6	12	4	9	3	6	7	7	7	0	3	6	12
Euracoal	Number of employer organisations affiliated to Euracoal: **6**	6	2	2	2	1	2	2	2	0	0	1	1	4 (67% of Euracoal members)
	Share (%) of employer organisations that are affiliated to Euracoal: **8%**	35	12	13	5	4	7	8	7	0	0	14	6	10% (of all employer organisations involved in collective bargaining in the sector)
	Number of Member States with Euracoal employer organisation affiliate(s): **4**	4	2	2	2	1	2	2	2	0	0	1	1	3
	Number of company members: **8**	8	1	0	0	0	0	0	0	0	0	0	0	6
	Number of Member States with Euracoal employer organisations and/or company affiliate(s): **9**	9	3	2	2	1	2	2	2	0	0	1	1	7
IMA-Europe	Number of employer organisations affiliated to IMA-Europe: **13**	2	1	2	6	4	10	5	5	2	2	2	2	7 (54% of IMA-Europe members)
	Share (%) of employer organisations that are affiliated to IMA-Europe: **17%**	7	6	13	14	17	33	19	18	15	33	29	13	17% (of all employer organisations involved in collective bargaining in the sector)
	Number of Member States with IMA-Europe employer organisation affiliate(s): **9**	1	1	2	5	4	9	5	5	2	2	2	2	7
	Number of company members: **35**	1	4	1	16	2	10	20	1	4	0	2	7	20
	Number of Member States with IMA-Europe employer organisations	2	4	3	11	12	14	10	5	6	2	4	6	12

Employer organisations	Type of affiliation/coverage	Parts of the sector covered												Employer organisation involvement in collective bargaining
		5.1–2 Hard coal/lignite	7 Metal minerals	9.9 Mining support	Construction minerals	Aggregates from recycling	Lime	Industrial minerals	Ornamental stone	8.91 Fertilisers	8.92 Peat	8.93 Salt	8.99 Other	
	and/or company affiliate(s): **20**													
Aggregates Europe– UEPG	Number of employer organisations affiliated to Aggregates Europe – UEPG: **22**	1	3	3	19	9	9	7	11	2	2	1	5	12 (48% of Aggregates Europe – UEPG members)
	Share (%) of employer organisations that are affiliated to Aggregates Europe – UEPG: **29%**	6	18	19	44	39	30	27	39	15	33	14	31	26% (of all employer organisations involved in collective bargaining in the sector)
	Number of Member States with Aggregates Europe – UEPG employer organisation affiliate(s): **17**	1	3	3	16	8	8	7	9	2	2	1	4	10
	Number of company members: **3**	0	0	0	3	1	1	2	1	0	0	0	1	1
	Number of Member States with Aggregates Europe – UEPG employer organisations and/or company affiliate(s): **19**	1	3	3	19	9	9	8	10	2	0	0	5	10
APEP	Number of employer organisations affiliated to APEP: **0**	0	0	0	0	0	0	0	0	0	0	0	0	0
	Share (%) of employer organisations that are affiliated to APEP: **0%**	0	0	0	0	0	0	0	0	0	0	0	0	0%
	Number of Member States with APEP employer organisation affiliate(s): **0**	0	0	0	0	0	0	0	0	0	0	0	0	0
	Number of company members: **3**	0	0	0	1	0	0	1	0	1	0	1	1	3
	Number of Member States with APEP employer organisations and/or company affiliate(s): **3**	0	0	0	1	0	0	1	0	1	0	1	1	3

Source: *Network of Eurofound Correspondents*, *2021*

Table 53: Overview of the representativeness of European social partners through their national member organisations and member companies

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
IndustriAll Europe Trade union																											
Euromines Employer organisation																											
Member companies																											
Euracoal Employer organisation																											
Member companies																											
IMA-Europe Employer organisation																											
Member companies																											
Aggregates Europe – UEPG Employer organisation																											
Member companies																											
APEP																											
Member companies																											

Notes: *The grey marked cells indicate Member States where the social partner organisations have affiliated trade unions or employer organisations that are not involved in collective bargaining, and the purple cells indicate Member States where they have an affiliated national sectoral organisation that is involved in collective bargaining. The yellow cells indicate where there is an affiliated company not involved in collective bargaining, and the orange cells indicate the Member States where there is a company affiliated that is involved in collective bargaining.*

Source: *Network of Eurofound Correspondents, 2021*

3.8. Capacity of European social partners to negotiate

The European Commission's criteria for EU-level social partners to be part in an ESSDC are twofold.

> *(b) They shall consist of organisations, which are themselves an integral and recognised part of Member State social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States.*
>
> *(c) They shall have adequate structures to ensure their effective participation in the work of the Committees.*

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 of the TFEU.

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 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.

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 or 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.

At national level, the representative status of the member organisations, giving them the legitimate right to engage in negotiations to determine working conditions, in collective bargaining or social dialogue, and the extent to which they are actually doing this, are illustrated for IndustriAll Europe in Table 31, for Euromines in

Table 36 and Table 38, for Euracoal in Table 39 and Table 41, for IMA-Europe in Table 42 and Table 44, for Aggregates Europe – UEPG in Table 45 and Table 47, and for APEP in Table 48. On a country-by-country basis, this is also reflected in Table 53, in 3.7. **Collective representativeness of Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, and APEP on the ESSDC, and comparative analysis between them**.

At European level, the mandate or mandating procedure can be either **statutory** (that is, laid down in the statutes, for example the constitution, of the organisation or annexed to them) or **non-statutory** (for example, laid down in secondary documents, such as rules of procedure, memoranda of understanding or ad hoc decisions by the governing bodies of the organisation). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in binding agreements in the past.

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 a specific negotiation, and 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. European social partners will be asked to provide proof of their statutes or any other written documentation describing their mandate and capacity to negotiate, and of the ratification procedures in place (Eurofound, 2016b).

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 and the ratification procedures in place. This section assesses the capacity to negotiate of all European social partners involved.

The ESSDC 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 ESSDC (Eurofound, 2009). The NEPSI agreement was signed by IndustriAll Europe on the trade union side and by Euromines, IMA-Europe, Aggregates Europe – UEPG, and 13 other European employer associations on the employer organisations side. Recent achievements of the extractive industries ESSDC include:

- activities in the EU-funded project on the role of social dialogue in sustainable raw materials (Sodisees) (2023–2025)
- a review of the sectoral social dialogue (2023)
- a joint statement on the Critical Raw Materials Act (2023)
- joint letters on NEPSI (2022)
- a call for ‘A long-term and ambitious EU Raw Materials Strategy’ (2020)
- a joint opinion with regard to the revision of the EU Emissions Trading System directive for the post-2020 period (2016)
- a joint opinion on the 2030 climate and energy package (2014)
- discussions with the Directorates-General for Internal Market, Industry, Entrepreneurship and SMEs, Justice and Consumers, Climate Action, and Environment, on the future of the sector

Table 54: Capacity and mandate to negotiate agreements of the European social partners[35]

EU social partners	Statutes	Statutory mandate	Non-statutory mandate	Intrinsic capacity to negotiate agreements	Agreements signed
APEP	Transmitted	No	No	Declared in a letter in 2020	None
Euracoal	Transmitted	No	No (but an ad hoc mandate is possible)[36]	Ad hoc possible	None
Euromines	Publicly available	No	No	Yes	NEPSI[37]
IMA-Europe	Transmitted	Yes (limited)[38]	Yes (limited)	n/a	NEPSI
Aggregates Europe – UEPG	Transmitted	Yes (limited)[39]	n/a	n/a	NEPSI
IndustriAll	Publicly available	Yes	n/a	n/a	NEPSI

Notes: *n/a = not applicable. Analyses made by Christian Welz (Eurofound) based on the statutes provided by the organisations.*

The situation of each European social partner of the extractive industries with regard to its capacity to negotiate agreements is described below.

APEP

The statutes of APEP as of 1 February 2013 include neither a statutory nor a non-statutory mandate to negotiate binding agreements with other social partners on behalf of its members. However, in a letter addressed to the Directorate-General for Employment, Social Affairs and Inclusion on 6 January 2020, APEP said that in its meeting on 12 December 2019 the General Assembly adopted a resolution empowering the Board of Directors to 'represent, negotiate and decide on social manners on the level of the EU, in particular in the scope of the Sectoral Social Dialogue of the Extractive Industries'. This is the only factual element

[35] A full list of European social partner organisations consulted under Article 154 of the TFEU can be found at http://ec.europa.eu/social/main.jsp?catId=329&langId=en

[36] According to Euracoal, 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 has the power to activate this kind of mandate.

[37] On 25 April 2006 the members of NEPSI signed the multisector Agreement on Workers Health Protection through the Good Handling and Use of Crystalline Silica and Products Containing It.

[38] According to Article 7 of IMA-Europe's internal rules, 'IMA-Europe has been empowered to negotiate and ratify social dialogue agreements in the fields of health and safety at work, skills and education'. This was confirmed by the 2016 representativeness study (see Eurofound, 2016a).

[39] According to Article 5 of Aggregates Europe – UEPG's statutes, the scope of these agreements is limited (for example, to health and safety, or training and education) and some topics are even explicitly excluded (such as collective bargaining, wages, benefits and working time).

addressing the capacity to negotiate of this employer organisation. APEP has not signed the NEPSI agreement.

Euracoal

According to its statutes in the version modified on 24 January 2011, Euracoal does not possess an explicit statutory capacity to negotiate binding agreements. Although its statutes mention that Euracoal participates in the EU-level sectoral 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. According to the 2016 representativeness study, however, Euracoal may receive an ad hoc non-statutory mandate if need be, as 'EURACOAL clarified that its statutes (notably Article 2 and 6) have to be interpreted as follows: if EURACOAL needs to negotiate and enter 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' (Eurofound, 2016a).

Euracoal has not signed the NEPSI agreement.

Euromines

In light of its statutes of 19 April 2023 and its internal rules, Euromines possesses neither a statutory nor a non-statutory capacity to negotiate.

The internal rules of Euromines only include the following statement about its specific goals, excluding tariffs, working time and labour related issues.

> *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 [General Assembly] 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.*

Euromines has, however, signed the NEPSI agreement and thus seems to possess an intrinsic capacity to negotiate.

IMA-Europe

On the grounds of Article 16.1(n) of the by-laws from 22 April 2020, 'the General Assembly shall have the powers specifically granted to it by law or these by-laws. In particular, the General Assembly shall have the following powers of the adoption/approval of social dialogue agreements in the fields of health and safety at work, skills and education in the name and on behalf of the Members, upon proposal of the Board of Directors'. In a similar vein, IMA-Europe's internal rules of 6 May 2015 include point 7, a section on the mandating procedure to negotiate and ratify agreements in the ESSDC 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.*

Thus, IMA-Europe possesses a limited statutory and non-statutory mandate, which is, however, restricted as regards the scope of these agreements (for instance, limited to health and safety at work, or skills and education). The statues also specify that any agreement signed must be ratified by the General Assembly. According to Article 20.3 of the by-laws, the majority to be obtained needs to be 'of at least fifty per cent (50%) plus one (1) vote of the votes cast by the Sections present or represented'.

As a factual proof of its capacity to negotiate, IMA-Europe has signed the NEPSI agreement.

Aggregates Europe – UEPG

Aggregates Europe – UEPG also holds a statutory mandate on the basis of Article 5 of its statutes, which were revised on 3 June 2016. Similarly to IMA-Europe, the scope of these agreements is limited (such as to health and safety, or training and education) and some topics are even explicitly excluded (such as collective bargaining, wages, benefits and working time). It reads:

> *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.*

According to Article 18 of the statutes, 'decisions will preferably be reached by consensus, except when any of the voting members requests a vote, in which case a specific vote will be organized on the particular issue'.

As a factual proof of its capacity to negotiate, Aggregates Europe – UEPG has signed the NEPSI agreement.

IndustriAll Europe

IndustriAll possesses a very concrete and detailed statutory mandate proving its capacity to negotiate binding agreements. Article 29 of the statutes of 16 May 2012 sets out the scope and content of the Policy Committees. Among these, the statutes explicitly mention a 'Collective Bargaining and Social Policy Committee (CBSPC).'

In conjunction with Article 21m of the statues, Appendix II contains very detailed provisions on the decision on platform and delegation, on the negotiation of social dialogue texts and for information and consultation duty towards affiliates, on the adoption of texts, on what happens if no agreement is reached and on the implementation of agreements. Appendix II also calls for a specific procedure and majority for the adoption of agreements: 'the Executive Committee shall adopt the text by a qualified majority of at least two-thirds – possibly via a written procedure. Abstentions or failure to reply within the given deadline shall be counted as votes in favour'.

As a factual proof of its capacity to negotiate, IndustriAll Europe has signed the NEPSI agreement.

Table 55: Agreed texts in the extractive industries ESSDC

Date	Signatory parties						Title of the joint text
	IndustriAll Europe	Euracoal	Euromines	IMA-Europe	Aggregates Europe – UEPG	APEP	
7 February 2023							Joint statement on the Critical Raw Materials Act
4 December 2020							A long-term ambitious EU Raw Materials Strategy
24 October 2016							Position of the Social Dialogue Committee of the extractive industry with regards to the revision of the EU ETS directive for the post 2020 period
1 October 2014							Extractive industries reaction to the 2030 climate and energy package
28 February 2014							Joint opinion on the draft recommendations of the SCOEL for occupational exposure limits on the workplace for NO_2 and NO
25 February 2013							Joint opinion on ETS backloading
6 September 2012							Joint statement on the further improvement of the working conditions and occupational health of employees in the extractive industries
27 January 2012	EMCEF						Budapest III declaration on Coal Policy
9 September 2011	EMCEF						Position – Reinhard Butifoker report
2 July 2010	EMCEF						Opinion of the social partners on the potential unilateral increase of the EU GHG reduction target to -30%
19 November 2009	EMCEF						Joint position of the Social Dialogue Extractive Industries on COP 15 and its impact on EU extractive industries
21 May 2008	EMCEF						Position paper on EU Commission's climate package of 23 January 2008
12 December 2007	EMCEF						Energy policy and the future of the extractive industries: Inseparably linked
22 July 2007	EMCEF						Joint position on the Commission proposal for EU Framework Directive on Soil Protection (COM 2006(232))
22 November 2005	EMCEF						Need for a European Mineral Resources Strategy

18 November 2004	EMCEF						Joint Declaration of the Social Dialogue for the mining sector on general questions of health and safety in raw materials extraction
13 January 2004	EMCEF						Position of the European social partners, sectoral committee mines on training and continuing training
2 January 2004	EMCEF						Opinion of the European Social Partners Sectoral Committee 'Mines' on the anti-dumping proceedings of the European Commission
15 December 2003	EMCEF						Social dialogue position on the proposed directive on the management of waste from the extractive industries
1 April 2003	EMCEF						Position of the European social partners, sectoral committee mines on training and continuing training
1 February 2003	EMCEF						Joint statement on the preservation of the safety and health commission for the mining and other extractive industries
21 January 2003	EMCEF						Position on the SCOEL recommendation for an occupational exposure limited for nitrogen monoxide (NO)
8 November 2002	EMCEF	CECSO					Position on the planned EU directive on emission trading
18 November 2000	EMCEF	CECSO					Joint declaration

Source: *European Commission, undated-a,* European social dialogue texts database

3.9. Effective participation in the extractive industries sector ESSDC

Between 2019 and 2022, there were three meetings each year of the extractive industries ESSDC. In 2021 the meetings were in May, October and December; in 2022, they took place in March, September and December. All meetings in 2020 were videoconferences. In 2021, the first two meetings continued the online format but the last one reverted to being in person. In 2022, the meetings were held in all formats, online (first), hybrid (second) and in person (third).

Looking at Table 56, it appears that the set of Member States represented was stable during 2019–2022, with trade union representatives from six or seven Member States present and employer organisation representatives from seven or eight Member States.

IndustriAll Europe has affiliated sectoral trade unions in 20 Member States. In 2019–2022, delegates from 10 Member States participated in ESSDC meetings. The 10 Member States from which a trade union delegate participated are Austria, Belgium, Bulgaria, France, Hungary, Italy, Poland, Portugal, Spain and Sweden. The 10 Member States where IndustriAll Europe has members but none participated in ESSDC meetings in this four-year period are Croatia, Czechia, Denmark, Finland, Germany, Greece, Ireland, Luxembourg, the Netherlands and Romania. Among those, Czechia and Germany are countries with more than 10,000 employees in the sector, and Greece, Finland and the Netherlands have more than 5,000 sectoral employees.

All together, Euromines, Euracoal, IMA-Europe and Aggregates Europe – UEPG have affiliated employer organisations in 20 Member States. The seven Member States where this is not the case are Croatia, Estonia, Latvia, Lithuania, Luxembourg, Malta and Slovenia. Adding the member companies affiliated to Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, and APEP, there is an affiliated company or employer organisation in 23 Member States. The four Member States where there is neither a company nor an employer organisation represented in the ESSDC are Croatia, Latvia, Lithuania and Malta.

In 2019–2022, employers’ delegates from nine Member States participated. These nine are Austria, Belgium, Czechia, Germany, Greece, Hungary, Poland, Spain and Sweden. There are 14 Member States that have employer organisations or companies affiliated to the European employer organisations but none participated in the ESSDC meetings in 2019–2022. These are Bulgaria, Cyprus, Denmark, Estonia, Finland, France, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Romania, Slovakia and Slovenia. Among those are four Member States in which there are more than 10,000 employees in the extractive industries: Bulgaria, France, Italy and Portugal. In Finland and the Netherlands, there are more than 5,000 employees in the sector and also no employers’ delegate participating during 2019–2022.

Effective participation details for each of the four years can be found in Table 56 on the next page.

Table 56: Effective participation in the extractive industries ESSDC

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
IndustriAll Europe Trade unions																											
2019 (7 Member States)																											
2020 (6 Member States)																											
2021 (7 Member States)																											
2022 (7 Member States)																											
Number of years with participation	2	1	4							4		4		4		2						1	4		1		
Member employer organisations																											
Member companies																											
2019 (7 Member States)																											
2020 (8 Member States)																											
2021 (7 Member States)																											
2022 (8 Member States)																											
Number of years with participation	3	4			3	3			2	4				4								4			3		

Notes: *Purple indicates the Member States where there is a national trade union or employer organisation represented by the European social partners in the ESSDC at national level and involved in collective bargaining shaping the working conditions in the sector. Blue indicates the Member States that have member organisations but they are not involved* *in collective bargaining. Orange indicates the Member States where there is a member company involved in company-level collective bargaining. Yellow indicates Member States where there is a company represented but it is not involved in collective bargaining. Green indicates the Member States from which there were delegates participating in meetings of the ESSDC. Red indicates the Member States with more than 10,000 employees in the sector and no participating employer organisations. Grey indicates Member States with more than 5,000 employees in the sector and no participating employer organisations.*

3.10. The Member States with the largest sectoral workforces

This section looks first at the membership structures in the five EU Member States with the largest extractive industries sector workforces in absolute numbers. Subsequently, it examines the membership of the ESSDC organisations in the EU Member States with the largest employment as a share of total national employment.

Table 57 and Table 58 demonstrate that, in most countries with the highest numbers employed in the extractive industries sector, organisations are represented on the ESSDC by at least one trade union organisation and at least one employer organisation. All of them also have at least one organisation on the trade union side and one on the employer side represented on the ESSDC and involved in collective bargaining, with the exception of Romania, which lacks an employer organisation represented on the ESSDC that engages in collective bargaining.

Table 57: Affiliations in the Member States with the largest sectoral employment

Member State	Total number employed in the sector (2020)	At least one trade union represented on the ESSDC	At least one trade union represented on the ESSDC involved in collective bargaining	At least one employer organisation represented on the ESSDC	At least one employer organisation represented on the ESSDC involved in collective bargaining
PL	119,838				
DE	47,306				
BG	21,864				
CZ	20,310				
RO	19,106				

Notes: *Countries are ordered according to the total number employed. Grey shading indicates a positive response, while orange shading indicates a negative response.*

Sources: *Eurostat SBS, 2021; and data provided by the Network of Eurofound Correspondents, 2021*

Looking at the five Member States with the highest proportions of the national workforce in the extractive industries sector, most have at least one trade union affiliated to one of the organisations on the ESSDC. The same is true on the employers' side. One clear exception is Latvia, where, despite the fact that the sector accounts for a relatively large share of total employment (more than 0.5%), there is neither a sector-related trade union nor an employer organisation involved in collective bargaining.

Table 58: Affiliations in the Member States where the extractive industries sector is largest as a share of total employment

Member State	Share of total employment (2020) (%)	At least one trade union represented on the ESSDC	At least one trade union represented on the ESSDC involved in collective bargaining	At least one employer organisation represented on the ESSDC	At least one employer organisation represented on the ESSDC involved in collective bargaining
PL	1.20				
BG	1.14				
CZ	0.55				
LV	0.54				
FI	0.48				

Notes: *Countries are ordered according to share of total employment. Grey shading indicates a positive response, while orange shading indicates a negative response.*

Sources: *Eurostat SBS, 2021; and data provided by the Network of Eurofound Correspondents, 2021*

4. Conclusions

In 2020 there were around 365,842 employees in the extractive industries sector in the EU27.

Just under half of the sector employment is in the somewhat vaguely named category 'other mining and quarrying' (NACE 8), which encompasses a vast array of different economic activities, including the quarrying of limestone, ornamental and building stone, gypsum, chalk and slate, and the mining of chemical and fertiliser minerals, peat and salt. The second largest part of the sector in terms of employment is the mining of coal and lignite, with around 36% of the total workforce. The remaining sectors – support activities for other mining and quarrying (NACE 9.9) and mining of metal ores (NACE 7) – employ respectively 12% and 5% of the sector-related workforce.[40]

Both the employment and company landscapes are heterogenous across the Member States. Some countries have few if any employers, and thus also few employees, in the sector, while the sector is a large employer of great national importance in other countries (such as in Poland, Bulgaria, Czechia, Latvia and Finland, where the sector stands for between 0.5% and 1.2% of the total national workforce). This is not surprising, as the distribution of extractive industry employers is inherently dependent, albeit not solely, on the location of natural resources. Company sizes and the national company structures vary a great deal, but across the EU27 large employers with 500 or more employees are important in the sector, employing almost two-thirds of the total sector workforce.

Standard employment practices are the most common in the sector, with open-ended contracts being the norm in most parts of the sector. The shares of part-time employment and self-employment are both very low. The sector has traditionally been and still is male dominated.

The sector has undergone a series of fundamental changes during the past few decades. The central role of extractive industries in the decarbonisation of the EU entails that the speed and scope of these changes are likely to only increase. This has a significant impact on the companies and workers active in this sector. The sector workforce has seen a decrease in the last decade.

This study has identified 74 trade unions and 75 employer organisations in the extractive industries sector in the EU27. This corresponds to an average of 2.7 trade unions and 2.7 employer organisations per Member State. The three EU Member States where there are no sector-related trade unions are Estonia, Latvia and Malta. The two countries where there are no sector-related employer organisations are Lithuania and Luxembourg.

None of the identified trade unions or employer organisations cover the entire sector as it has been defined in this study. With only a few exceptions, trade unions in the sector cover workers in only one or a few parts of extractive industries (most probably linked to those types of extractive industries that exist in the country in question) and at the same time cover workers in other sectors (here known as sectional overlap). Similarly to trade unions, employer organisations in the sector cover only one or a few parts of the sector. Around half are only active in extractive industries (sectionalism), and the other half have members active in other sectors as well (sectional overlap).

[40] Slightly different numbers are given in Section 2.1, based on the SBS data referred to in Note 16.

Of all sector-related trade unions, 96% are involved in collective bargaining, with a predominance of combined sector- and company-level bargaining. Among the employer organisations, 56% are involved in collective bargaining, predominantly sector-level bargaining.

On the workers' side, there is one European trade union organisation operating at European level: IndustriAll Europe. The organisation has members in all parts of the sector (as defined in this study), and, while the coverage rate varies, the members of IndustriAll Europe make up at least 50% of the trade unions active in each subsector. IndustriAll Europe has sector-related members in 20 Member States and has the trade union with most members in the extractive industries sector in 11 of them.

The five Member States with the largest sectoral workforces are all represented on the ESSDC by IndustriAll Europe. With only one exception (Latvia), the same is true for the Member States with the largest sectoral workforce as a share of national total workforce.

An assessment has also been made about the representativeness of the national sectoral trade unions not affiliated to IndustriAll Europe and thus not represented on the extractive industry ESSDC. These are 30 sector-related trade unions in 16 Member States. In eight countries, the trade union with the most members in the sector is not affiliated to IndustriAll Europe.

No other European trade union organisation was found that had any significant representativeness in the sector, allowing the conclusion that **IndustriAll Europe is the only European trade union organisation in the extractive industries sector that is fully representative of all employees in all activities in the sector**. IndustriAll Europe has proven its capacity to negotiate and is able to make commitments on behalf of all the member organisations it represents.

On the employers' side, there are five European employer organisations involved in the extractive industries ESSDC: Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, and APEP. Their membership domains largely overlap one another, but in terms of number of members there are clear concentrations in certain subsectors. Euromines has the most activity in metal minerals and construction minerals, Euracoal and Euromines in hard coal and lignite, IMA-Europe has the most national employer organisations in the lime sector, and Aggregates Europe – UEPG in construction minerals. The three company affiliates of APEP together cover five of the subsectors in extractive industries, namely construction minerals, industrial minerals, fertilisers, salt, and support activities for other mining and quarrying.

Euromines has 13 employer organisation members in 12 Member States. In eight countries, the employer organisation with most members in the extractive industries sector is affiliated to Euromines. In three countries where Euromines has no employer organisations as members, it has companies with direct membership. Euromines has affiliates in the extractive industries sector (both employer organisations and companies included), involved in collective bargaining in 12 Member States. Euromines has an intrinsic negotiation capacity, proven as a co-signing party in the NEPSI agreement.

Euracoal has six employer organisation members in four Member States. In Czechia, Poland and Romania, the employer organisation with most members in the extractive industries sector is affiliated to Euracoal, and in Germany the second largest is affiliated. In five countries where Euracoal has no employer organisations as members, it has companies with direct membership. There are Euracoal affiliates in the extractive industries sector (both employer organisations and companies included) involved in collective bargaining in seven Member States. Euracoal has no formalised negotiation capacity, but it can agree on joint opinions on an ad hoc basis.

IMA-Europe has 13 employer organisation members in 9 Member States. In four countries, the employer organisation with most members in the extractive industries sector is affiliated to IMA-Europe. In 11 countries where IMA-Europe has no employer organisations as members, it has companies with direct membership. IMA-Europe has affiliates in the extractive industries sector (both employer organisations and companies included), involved in collective bargaining in 12 Member States. IMA-Europe has a statutory-based negotiation capacity, proven as a co-signing party in the NEPSI agreement.

Aggregates Europe – UEPG has 22 employer organisation members in 17 Member States. In nine countries, the employer organisation with most members in the extractive industries sector is affiliated to it. In two countries where it has no employer organisations as members, it has companies with direct membership. Aggregates Europe – UEPG has affiliates in the extractive industries sector (both employer organisations and companies included), involved in collective bargaining in 10 Member States. Aggregates Europe – UEPG has a statutory-based negotiation capacity, proven as a co-signing party in the NEPSI agreement.

APEP has no employer organisations as members. Instead, the organisation has only companies as direct members, three in total in three different Member States. All of its affiliated companies are involved in sector-related collective bargaining, in three different Member States. APEP has, in December 2019, declared its negotiation capacity, formalised in a letter from January 2020.

An analysis of the national employer organisations that are not affiliated to any of the 5 European employer organisations on the ESSDC listed 28 employer organisations from 12 Member States. Most of them are involved in collective bargaining. In five Member States (Croatia, Latvia, Malta, Slovakia and Slovenia) the employer organisation with the most members in the sector is not represented on the ESSDC.

Some other European associations were identified, although none with a significant degree of representativeness.

IndustriAll Europe, IMA-Europe and Aggregates Europe – UEPG all have a statutory mandate to negotiate agreements. Euromines, Euracoal and APEP do not have this. Euromines, however, has a proven capacity to negotiate agreements, as it has signed the NEPSI agreement. Euracoal has the possibility of an ad hoc mandate. APEP has declared to have negotiation capacity in a letter from 2020.

Altogether Euromines, Euracoal, IMA-Europe, Aggregates Europe – UEPG, and APEP are the most representative European employer organisations in the extractive industries sector. The Member States with the largest workforces, both in absolute and relative terms, are also represented.

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Annex 1: Supplementary tables

Table 59: List of all sector-related trade unions

Member State	Name of trade union in original language	Abbreviation	Name in English
AT	Gewerkschaft Bau-Holz	GBH	Construction and Woodworkers Union
AT	Produktionsgewerkschaft PRO-GE	PRO-GE	Production Union
AT	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	GPA	Union of Private Sector Employees, Printing, Journalism, and Paper
BE	Algemene Centrale – Centrale Generale	ABVV-FGTB ACCG	General Union
BE	(Algemeen Christelijk Vakverbond) Bouw Industrie en Energie	ACV-CSC BIE	(General Christian Trade Union) Construction, Industry and Energy
BE	(Confédération des syndicats chrétiens) Centrale Nationale des Employés	CSC-CNE	(Confederation of Christian Trade Unions) National Centre of Employees
BE	Algemene Centrale der Liberale Vakbonden van België – Centrale Générale des Syndicats Libéraux de Belgique	ACLVB-CGSLB	General Federation of Liberal Trade Unions in Belgium
BG	Синдикална миньорска федерация „Подкрепа”	Syndical Miners Federation ‘Podkrepa’	Syndical Miners Federation ‘Podkrepa’
BG	Федерация на независимите синдикати на миньорите	CITUB-FNSM-miners	Federation of the Independent Trade Union of Miners
CY	Συντεχνία Οικοδόμων, Ξυλουργών, Μεταλλωρύχων και Γενικών Εργατών Κύπρου-ΠΕΟ	Oikodomoi-PEO	Cyprus Building, Wood, Mine and General Workers Trade Union-PEO
CY	Δημοκρατική Εργατοϋπαλληλική Ένωση Οικοδόμων και Ξυλουργών-ΔΕΟΚ	DEOK	Democratic Trade Union of Builders and Carpenters-DEOK
CY	Ομοσπονδία Οικοδόμων – Μεταλλωρύχων και Συναφών Επαγγελμάτων Κύπρου	OOIM-SEK	Federation of Builders, Miners and Relevant Professions
CZ	Odborový svaz pracovníků hornictví, geologie a naftového průmyslu	OS PHGN	Trade Union of Workers in Mines, Geology and Oil Industry
CZ	Odborový svaz energetiky a hornictví	OSEH	Trade Union of Energy and Mining
CZ	Odborový svaz KOVO	OS KOVO	Czech Metalworkers’ Federation
CZ	Odborový svaz ECHO	OS ECHO	Trade union ECHO
CZ	Odborový svaz sklářského, keramického, bižuterního průmyslu a porcelánu	OSSKP	Trade Union of Glass, Ceramics and Porcelain
DE	Industriegewerkschaft Bergbau, Chemie, Energie	IG BCE	Mining, Chemical and Energy Industries Union
DE	Industriegewerkschaft Bauen Agrar Umwelt	IG BAU	Trade Union Construction, Agriculture and the Environment
DK	Centralorganisationen af Industriansatte i Danmark	CO-industri	CO-industri
DK	Ingeniørforeningen	IDA	Danish Society of Engineers

EE	No trade unions identified		
EL	Omospondia Metalorihon Elladas	OME	Federation of Miners of Greece
EL	Omospondia Hiriston Mihanimaton Ergou Elladas (OHMEE)	OHMEE	Hellenic Federation of Site Machine Operators
EL	Omospondia Ergaton Tehniton & Ipallilon Tsimenton Ellados	GFWECI	Greek Federation of Workers and Employees in Cement Industry (GFWECI)
ES	Unión General de Trabajadores – Federación de Industria, Comercio y Agro	UGT-FICA	Federation of Industry, Construction and Agriculture of the General Union of Workers
ES	CCOO – Comisiones Obreras	CCOO Industria	Workers' Commissions – Industry
ES	Federación de Industria de la Unión Sindical Obrera	USO FI	Industry Federation of Workers' Trade Union
ES	Eusko Langileen Alkartasuna Industria eta Eraikuntza	ELA Industria eta Eraikuntza	Solidarity of Basque Workers, Industry and Construction
ES	Confederación Intersindical Galega Industria	CIG Industria	Galician Trade Union Confederation
FI	Ylemmät toimihenkilöt YTN	YTN	Federation of Professional and Managerial Staff
FI	Tekniikan Akateemiset	TEK	Academic Engineers and Architects in Finland
FI	Insinööriliitto	No abbreviation	Union of Professional Engineers
FI	Teollisuusliitto	No abbreviation	Finnish Industrial Union
FI	Ammattiliitto Pro ry	Pro	Trade Union Pro
FI	Sähköliitto	No abbreviation	Finnish Electrical Workers' Union
FI	Rakennusliitto	No abbreviation	Finnish Construction Trade Union
FR	Fédération BA-TI-MAT CFTC	BA-TI-MAT CFTC	BA-TI-MAT Federation CFTC
FR	Syndicat national des Cadres, Techniciens, Agents de Maîtrise et assimilés, des industries du Bâtiment, des Travaux Publics et des activités annexes et connexes	CFE-CGC BTP (section SICMA)	National trade unions of managers, technicians, supervisors and similar staff in the building, public works and related industries
FR	Fédération Nationale Construction Bois – CFDT	FNCB-CFDT	National Construction and Wood Federation – CFDT
FR	Fédération Générale FO	FG-FO	General Federation FO
FR	Fédération nationale des salariés de la construction, bois et ameublement CGT	FNSCBA-CGT	National Federation of Construction, Wood and Furniture Workers CGT
HR	Sindikat graditeljstva Hrvatske	SGH	Trade Union of Construction Industry of Croatia
HR	Sindikat naftnog gospodarstva	SING	Oil Economy Trade Union
HU	Bánya-, Energia- és Ipari Dolgozók Szakszervezete	BDSZ	Mining-, Energy- and Industrial Workers' Union

IE	Services Industry Professional Technical Union	SIPTU	Services Industry Professional Technical Union
IE	Unite the Union	Unite	Unite the Union
IE	Connect	Connect	Connect Trade Union
IT	Federazione Italiana Lavoratori Chimici Tessile Energia Manifatture	Filctem CGIL	Italian Federation for Chemical, Textile, Energy and Manufacturing Workers
IT	Federazione Lavoratori Energia Moda Chimica e Affini	FEMCA CISL	Federation for Energy, Fashion, Chemical and Related Workers
IT	Unione Italiana Lavoratori Tessile, Energia, Chimica	Uiltec UIL	Italian Union Textile, Energy and Chemical Workers
LT	Lietuvos baldų ir medžio apdirbimo įmonių darbuotojų profesinė sąjunga	LBMAĮDPS	Trade Union of Furniture and Woodworking Workers of Lithuania
LU	Lëtzebuerger Chrëschtleche Gewerkschaftsbond – Industrie et sidérurgie	LCGB-Indusid	Luxembourg Christian Trade Union Confederation – Industry and steel
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre de l'OGB-L	OGB-L	Wood, Rubber, Ceramics, Chemicals, Cement, Paper, Plastic, Textiles and Glass Union of the Independent Luxembourg Trade Union Confederation
LV	Latvijas Industriālo nozaru arodbiedrība	LIA (LINA)	Latvian Industrial Workers Trade Union
MT	General Workers Union	GWU	GWU
NL	Christelijk Nationaal Vakverbond	CNV	National Federation of Christian Trade Unions
NL	Federatie Nederlandse Vakbeweging	FNV	The Netherlands Trade Union Confederation
PL	Sekretariat Górnictwa i Energetyki NSZZ Solidarność	SGiE NSZZ Solidarność	Secretariat of Mine and Energy Workers of NSZZ Solidarność
PL	Związek Zawodowy Górników w Polsce	ZZG	Trade Union of Miners in Poland
PL	Porozumienie Związków Zawodowych Kadra	PZZ Kadra	Alliance of Trade Unions 'Kadra'
PL	Sekretariat Przemysłu Chemicznego NSZZ Solidarnośc	SPCh NSZZ Solidarność	Chemical Industry Workers' Secretariat of NSZZ Solidarność
PL	Sekretariat Budownictwa i Przemysłu Drzewnego NSZZ Solidarność	SBiPD NSZZ Solidarność	Secretariat of Construction and Wood Workers of NSZZ Solidarność
PL	Związek Zawodowy 'Budowlani'	Budowlani	Trade Union 'Builders'
PT	Sindicato dos Trabalhadores da Indústria Mineira	STIM	Union of Mineworkers
PT	Federação Intersindical das Indústrias Metalúrgicas, Químicas, Eléctricas, Farmacêutica, Celulose, Papel, Gráfica, Imprensa, Energia e Minas	Fiequimetal	Interunion Federation of Metal, Chemical, Electric, Pharmaceutical, Pulp, Paper, Printing, Press, Energy and Mining Industries
RO	Federația Sindicatelor "Gaz România"	FSGR	Trade Union Federation 'Gas Romania'
RO	Federatia Nationala Sindicala Salroca	FNS Salroca	Trade Union Federation Salroca
RO	Federatia Nationala Mine Energie	FNME	National Federation for Mining and Energy

SE	IF Metall	IF Metall	The Swedish Metalworkers' Union
SE	Svenska Elektrikerförbundet	SEF	The Swedish Electricians' Union
SE	Sveriges Ingenjörer	SI	Engineers of Sweden
SE	Unionen	Unionen	Unionen
SI	Sindikat delavcev rudarstva in energetike Slovenije	SDRES	Trade Union of Mining and Energy Workers of Slovenia
SI	Sindikat pridobivanja energetskih surovin Slovenije (Sindikat premogovnika Velenje)	SPESS	Trade Union for the Extraction of Energy Raw Materials of Slovenia (trade union of company Premogovnik Velenje)
SI	Zveza svobodnih sindikatov Slovenije, Sindikat kemične, nekovinske in gumarske industrije Slovenije	ZSSS-KNG	Association of Free Trade Unions of Slovenia – Trade Union of Chemical, Non-metallic and Rubber Industry of Slovenia
SK	Odborový zväz Pracovníkov baní, geológie a naftového priemyslu SR	OZ PBGN	Trade Union of Workers of Mining, Geology and Petroleum Industry of the Slovak Republic

Source: *Network of Eurofound Correspondents*, *2021*

Table 60: List of all sector-related employer organisations and business associations

Member State	Name of employer organisation/business association in original language	Abbreviation	Name in English
AT	Bundesinnung der Bauhilfsgewerbe	BIB	Federal Association of the Construction Ancillary Trades
AT	Fachverband der Stein- und keramischen Industrie	FSKI	Federal Association for the Building Materials and Ceramic Industries
AT	Fachverband Bergwerke und Stahl	FBS	Austrian Mining and Steel Association
BE	Verbond van ontginningsbedrijven	Fediex	Association of Mining Companies
BE	Bedrijfsgroepering Zandgroeven	No abbreviation	Business Group of Sand Quarries
BE	Fédération de l'Industrie des Carrières de Grès	No abbreviation	Federation of the Stone Industry
BE	Belgische Steenkoolfederatie	No abbreviation	Belgian Coal Federation
BE	Union des Carrières et Scieries de Marbres de Belgique	No abbreviation	Union of Marble Quarries and Sawmills of Belgium
BE	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique	No abbreviation	Belgian Federation of Small Blue-Granite Stone Quarries

BE	Bedrijfsgroepering der Limburgse Baggeraars	No abbreviation	Company Grouping of Limburg Dredgers
BG	Българска минно-геоложка камара	БМГК	Bulgarian Chamber of Mining and Geology
CY	Ομοσπονδία Συνδέσμων Εργολάβων Οικοδομών Κύπρου	ΟΣΕΟΚ	Cyprus Building Contractors Association
CY	ΠΑΓΚΥΠΡΙΟΣ ΣΥΝΔΕΣΜΟΣ ΣΚΥΡΟΠΟΙΩΝ	CAPA	Cyprus Aggregates Producers Association
CZ	Zaměstnavatelský svaz důlního a naftového průmyslu-Společenstvo těžařů České republiky	ZSDNP	Employers Association of Mining and Oil Industry of the Czech Republic
CZ	Těžební unie	No abbreviation	Mining Association of the Czech Republic
CZ	Svaz výrobců vápna České republiky	SVVAPNO	Czech Lime Association
DE	a-vero	No abbreviation	a-vero
DE	Branchenverband Steinkohle und Nachbergbau	BSN	Federal Association Hard Coal and Post-mining Services
DE	Bundesverband der keramischen Rohstoffe und Industriemineralien	BKRI	German Ceramic Raw Materials and Industrial Minerals Association
DE	Verband der Kali- und Salzindustrie	VKS	Association of the Potash and Salt Industry in Germany
DE	Bundesverband Mineralische Rohstoffe e.V.	BV MIRO	German Aggregates Federation
DE	Deutsche Braunkohlen-Industrie-Verein	Debriv	German Lignite Industry Association
DE	Bundesverband der deutschen Kalkindustrie	BV Kalk	Federal Association of the German Lime Industry
DK	Dansk Industri	DI	The Confederation of Danish Industry
DK	Danske Råstoffer	Danske Råstoffer	Danish Aggregates Association
EE	Eesti Mäetööstuse Ettevõtete Liit	EMTEL	Association of Estonian Mining Enterprises
EE	Eesti Turbaliit	Turbaliit	Estonian Peat Association
EL	Sindesmos Metaleftikon Epihiriseon	GMEA	Greek Mining Enterprises Association
ES	Federación de Áridos	FdA	Aggregates Federation
ES	Asociación Nacional de Fabricantes de Cal y Dolomía de España	Ancade	Spanish Lime Manufacturers Association
ES	Confederación de Empresarios de la Minería y la Metalurgia	Confedem	Association of Mining and Metallurgy Companies

ES	Asociación Técnica y Empresarial del Yeso	ATEDY	Gypsum Technical and Business Association
ES	Federación nacional de empresarios de minas de carbón	Carbunión	National Coal Mining Employers Association
ES	Confederación Empresarial Española del Vidrio y la Cerámica	Confevicex	Spanish Business Confederation of Glass and Ceramics
ES	Asociación Ibérica de Fabricantes de Sal	Afasal	Iberian Association of Salt Producers
ES	Asociación Nacional Empresarial de los Productores Españoles de Minerales Industriales	Aindex	National Business Association of Spanish Industrial Mineral Producers
ES	Ibersil	No abbreviation	Ibersil
ES	Confederación Española de las Industrias de las Materias Primas Minerales	Primigea	Spanish Confederation of Mineral Raw Materials Industries
FI	Kaivosteollisuus ry	FinnMinn	Finnish Mining Association
FI	Koneyrittäjät ry	No abbreviation	Trade Association of Finnish Forestry and Earth Moving Contractors
FI	Kivi Ry	Kivi	Stone from Finland
FI	Rakennusteollisuus RT	RT	Confederation of Finnish Construction Industries RT
FI	Infra ry	Infra ry	Infra Contractors Association in Finland
FR	Union nationale des industries de carrières et matériaux de construction	Unicem	French National Association of Construction Material
FR	UP Chaux	No abbreviation	UP Limestone
HR	Hrvatska udruga poslodavaca, Udruga industrije nemetala, građevinskog materijala i rudarstva Hrvatske	HUP UINGMRH	Croatian Employers' Association, Non-metal, Building Materials and Mining Industry Association
HU	Magyar Bányászati Szövetség	MBSZ	Hungarian Mining Association
IE	Irish Concrete Federation	ICF	Irish Concrete Federation
IT	Assorisorse	No abbreviation	Assorisorse
IT	Associazione Nazionale Estrattori Produttori Lapidei ed Affini	Anepla	National Association of Stone and Related Producers Extractors
LT	Lietuvos karjerų asociacija	No abbreviation	Association of Lithuanian Quarries
LT	Durpių įmonių asociaciją „Lietuviškos durpės"	LD	Lithuanian Peat Producers Association

LU	*No employer organisation or business association identified.*		
LV	Latvijas Kūdras asociācija	LKA	Latvian Peat Association
LV	Būvmateriālu Ražotāju Asociācija	BRA	Latvian Association of Building Material Producers
MT	Malta Developers Association	MDA	Malta Developers Association
NL	Cascade	No abbreviation	Cascade
PL	Porozumienie Producentów Węgla Brunatnego	PPWB	Alliance of Brown Coal Producers
PL	Związek Pracodawców "Polska Miedź"	Polska Miedź	Employers Association 'Polish Copper'
PL	Stowarzyszenie Przemysłu Wapienniczego	SPW	Polish Lime Association
PL	Górnicza Izba Przemysłowo-Handlowa	GIPH	Polish Mining Chamber of Industry and Commerce
PL	Polski Związek Producentów Kruszyw	PZPK	Polish Association of Aggregate Producers
PT	Associação Nacional da Indústria Extractiva e Transformadora	ANIET	National Association of Extractive and Manufacturing Industry
PT	Associação Portuguesa dos Industriais de Mármores, Granitos e Ramos Afins	Assimagra	Portuguese Association of Marble, Granite and Related Industries
RO	Patronatul Producatorilor de Agregate Minerale	PPAM	Mineral Aggregate Producers Association
RO	Asociația Patronală Minieră din România	PAT RO MIN	Romanian Mining Employers Association
SE	Svemin – branschorganisationen för gruvor, mineral- och metallproducenter i Sverige	Svemin	Swedish Association of Mines, Mineral and Metal Producers
SE	Industriarbetsgivarna – Gruvornas Arbetsgivareförbund	GAF	The Swedish Association of Industrial Employers – Mining Industry Contractual Sector
SI	Energetska zbornica Slovenije	EZS	Energy Industry Chamber of Slovenia
SI	Gospodarska Zbornica Slovenije – Združenje kovinskih materialov in nekovin	GZS-ZKM	Chamber of Commerce and Industry of Slovenia – Metals and Nonmetals Association
SI	Združenje delodajalcev Slovenije – Sekcija za kemijo	ZDS	Association of Employers of Slovenia – Chemistry Section

SK	Zväz hutníctva, ťažobného priemyslu a geológie Slovenskej republiky	ZHŤPG	Association of Metallurgy, Mining Industry and Geology of the Slovak Republic
SK	Slovenské združenie výrobcov kameniva	SZVK	Slovak Association of Aggregate Producers
SK	Slovenská Banská Komora	SBK	Slovak Mining Chamber

Source: *Network of Eurofound Correspondents*, *2021*

Table 61: Demarcation of extractive industries sector by NACE code

NACE code	Corresponding economic activity	Description
5	**Mining of coal and lignite**	This division includes the extraction of solid mineral fuels through underground or open-cast mining, and includes operations such as 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 (9.90) or the manufacture of briquettes (19.20).
5.1	Mining of hard coal	This class includes: - mining of hard coal either underground or through surface mining, including mining through liquefaction methods - cleaning, sizing, grading, pulverising, compressing of coal to classify, improve quality or facilitate transport or storage This class also includes: - recovery of hard coal from culm banks
5.2	Mining of lignite (brown coal)	This class includes: - mining of lignite (brown coal) either underground or through surface mining, including mining through liquefaction methods - washing, dehydrating, pulverising, compressing of lignite to improve quality or facilitate transport or storage
7	**Mining of metal ores**	This division includes mining for metallic minerals (ores), performed through underground or open-cast extraction, seabed mining, etc. Also included are ore dressing and beneficiating operations, such as crushing, grinding, washing,

		drying, sintering, calcining or leaching ore, gravity separation or flotation operations. This division does not include roasting of iron pyrites (20.13), production of aluminium oxide (24.42) or operation of blast furnaces (24).
7.1	Mining of iron ores	This class includes: - mining of ores valued chiefly for iron content - beneficiation and agglomeration of iron ores
7.2	Mining of non-ferrous metal ores	This group includes the mining of non-ferrous metal ores.
7.21	Mining of uranium and thorium ores	This class includes: - mining of ores chiefly valued for uranium and thorium content, including pitchblende - concentration of such ores - manufacture of yellowcake
7.29	Mining of other non-ferrous metal ores	This class includes: - mining and preparation of ores chiefly valued for non-ferrous metal content: • aluminium (bauxite), copper, lead, zinc, tin, manganese, chrome, nickel, cobalt, molybdenum, tantalum, vanadium, etc. • precious metals including gold, silver and platinum
8	**Other mining and quarrying (mining/quarrying of construction minerals and industrial minerals)**	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 (such as sands or stones), manufacture of materials (such as clay, gypsum or calcium), and manufacture of chemicals. This division does not include processing (except crushing, grinding, cutting, cleaning, drying, sorting and mixing) of the minerals extracted.
8.1	Quarrying of stone, sand and clay	This group includes the quarrying of stone, sand and clay.
8.11	Quarrying of ornamental and building stone, limestone, gypsum, chalk and slate	This class includes: - quarrying, rough trimming and sawing of monumental and building stone such as marble, granite and sandstone - breaking and crushing of ornamental and building stone - quarrying, crushing and breaking of limestone - mining of gypsum and anhydrite - mining of chalk and uncalcined dolomite
8.12	Operation of gravel and sand pits; mining of clays and kaolin	This class includes: - extraction and dredging of industrial sand, sand for construction and gravel

		- breaking and crushing of gravel - quarrying of sand - mining of clays, refractory clays and kaolin
8.9	**Mining and quarrying (not elsewhere classified)**	This group includes activities related to mining and quarrying not elsewhere classified.
8.91	Mining of chemical and fertiliser minerals	This class includes: - mining of natural phosphates and natural potassium salts - mining of native sulphur - extraction and preparation of pyrites and pyrrhotite (except roasting) - mining of natural barium sulphate and carbonate (barytes and witherite), natural borates, natural magnesium - mining of sulphates (kieserite) - mining of earth colours, fluorspar and other minerals valued chiefly as a source of chemicals This class also includes: - guano mining
8.92	Extraction of peat	This class includes: - peat digging - preparation of peat to improve quality or facilitate transport or storage
8.93	Extraction of salt	This class includes: - extraction of salt from underground including by dissolving and pumping - salt production by evaporation of sea water or other saline waters - crushing, purification and refining of salt by the producer
8.99	Other mining and quarrying not elsewhere classified	This class includes: - mining and quarrying of various minerals and materials, such as • abrasive materials, asbestos, siliceous fossil meals, natural graphite, steatite (talc), feldspar, etc. • natural asphalt, asphaltites and asphaltic rock; and natural solid bitumen • gemstones, quartz, mica, etc.
9	**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 redrilling for oil wells and metallic and non-metallic minerals. Other typical services cover 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, etc.

9.1	Support activities for petroleum and natural gas extraction	This class includes: - oil and gas extraction service activities provided on a fee or contract basis, such as • exploration services in connection with petroleum or gas extraction, such as traditional prospecting methods, such as making geological observations at prospective sites • directional drilling and redrilling; 'spudding in'; erecting derricks in situ, and repairing and dismantling them; cementing oil and gas well casings; pumping of wells; plugging and abandoning wells, etc. • liquefaction and regasification of natural gas for the purpose of transport, done at the mine site • draining and pumping services, on a fee or contract basis • test drilling in connection with petroleum or gas extraction This class also includes: - oil and gas field firefighting services
9.9	Support activities for other mining and quarrying	This class includes: - support services on a fee or contract basis, required for mining activities of divisions 05, 07 and 08, such as • exploration services, including traditional prospecting methods, such as taking core samples and making geological observations at prospective sites • draining and pumping services, on a fee or contract basis • test drilling and test hole boring

Source: *Eurostat, Statistical classification of economic activities in the European Community (NACE Rev. 2), 2008*

Table 62: Sectoral coverage, number of employees, trade union presence, affiliation to employer organisations and collective bargaining application of the two largest (in terms of number of employees) extractive industries companies per Member State

Member State	Name of largest employers in the sector	Estimated number of (sector-related) employees	Parts of the sector covered					Name of trade union(s) organising the employees in the enterprise/company	Name of employer organisation(s) to which this employer is affiliated	Type of collective bargaining applied to this employer (single-employer, multi-employer or both)
			5.1–2 Hard coal/lignite	7 Metal minerals	8 Construction minerals/aggregates	8 Industrial mineral	9 Mining support service activities			
AT	RHI Magnesita	1,750			X	X		GBH GPA	FBS	Multi-employer bargaining
	VA Erzberg	220		X				PRO-GE GPA	FBS	Multi-employer bargaining
BE	Carrières du Hainaut	427			X	X		ACV-CSC BIE ABVV-FGTB ACCG ACLVB	Fédération des Carrières de Petit Granit-Pierre Bleue de Belgique	Both
	Sibelco	332			X	X		ACV BIE ACCG ACLVB-CGSLB	Bedrijfsgroepering Zandgroeven	Both
BG	Mini Maritsa Iztok EAD	7,264	X					Syndical Miners Federation 'Podkrepa' CITUB-FNSM-miners	Bulgarian Chamber of Mining and Geology	Both
	Kaolin AD	1,000			X			CITUB-FNSM-miners	Bulgarian Chamber of Mining and Geology	No information
CY	Hellenic Minerals Ltd	Approx. 100		X				Oikodomoi-PEO OOIM-SEK DEOK	None	Single-employer bargaining
CZ	Severočeské doly a.s.	2,625	X					OS PHGN OSEH OS KOVO Four other basic trade union organisations	ZSDNP	Both
	DIAMO, státní podnik	2,223 (2019)		X				OS PHGN	ZSDNP	Both

Member State	Name of largest employers in the sector	Estimated number of (sector-related) employees	Parts of the sector covered					Name of trade union(s) organising the employees in the enterprise/company	Name of employer organisation(s) to which this employer is affiliated	Type of collective bargaining applied to this employer (single-employer, multi-employer or both)
			5.1–2 Hard coal/lignite	7 Metal minerals	8 Construction minerals/aggregates	8 Industrial mineral	9 Mining support service activities			
DE	RWE Power	Approx. 9,700 (as of mid-2017)	X					IG BCE (for RWE Power's mining activities)	Member of Debriv (affiliated to Euracoal) Parent company RWE Power is affiliated to an employer organisation from the electricity sector (AGWE)	Single-employer bargaining
	K+S (Kali und Salz)	Approx. 9,000				X		IG BCE	VKS	Single-employer bargaining
DK	Imerys Industrial Minerals Denmark A/S	Approx. 100			X			3f (United Federation of Danish Workers) Lederne (The Organisation of Managerial and Executive Staff in Denmark) TL (Danish Association of Professional Technicians) HK (The Union of Commercial and Clerical Employees in Denmark) Dansk Metal (Danish Metalworkers' Union)	DI	Both (as it follows the main DI agreements and also does local bargaining)
	Dansk Salt	24 in the sector (138 on virk.dk)[41]				X		3f (United Federation of Danish Workers) MMF (Danish Engineers' Association) Dansk Metal (Danish Metalworkers' Union) DEF (Danish Union of Electricians)	DI	Both (as it follows the main DI agreements and also does local bargaining)
EE	Paekivitoodete Tehase OÜ	78			X		X	n.d. (probably none)	EMTEL EETL (not dealing with extractive industries)	None

[41] According to company information, Dansk Salt is the largest in the sector, with a total of 138 employees, but the contact answered that it had only 24 employees in the sector. This answer makes Imerys Industrial the largest and FAXE Kalk the second largest, with 68 sectoral employees. However, since we have included a company sheet for FAXE Kalk, we have decided to keep Dansk Salt in this table.

Member State	**Name of largest employers in the sector**	**Estimated number of (sector-related) employees**	**Parts of the sector covered**					**Name of trade union(s) organising the employees in the enterprise/company**	**Name of employer organisation(s) to which this employer is affiliated**	**Type of collective bargaining applied to this employer (single-employer, multi-employer or both)**
			5.1–2 Hard coal/lignite	7 Metal minerals	8 Construction minerals/aggregates	8 Industrial mineral	9 Mining support service activities			
	Harku Karjäär	77			X			n.d. (probably none)	EMTEL EETL (no fact sheet provided, explained above – not dealing exactly with extractive industries)	None
EL	PPC/DEI Public Power Corporation SA	Approx. 1,630	X					GENOP PPC GENOP PPC-affiliated primary unions	PPC/DEI Public Power Corporation SA	Single-employer bargaining
EL	Eldorado Gold Corporation – Hellas Gold	Approx. 800 blue-collar employ-ees		X				3 trade unions at company level: 1. Trade Union of Workers and Employees of the Companies Aktor ATE – Greek Gold 'Agia Varvara' 2. Professional Association of Miner Workers in the Underground Mines of Kassandra, Chalkidiki 3. Workers' Union at the Construction Site of the Mines of Olympiada, Halkidiki – Gallery 59	Gold Hellas SA	Single-employer bargaining
ES	Minas de Aguas Teñidas SA	744				X		CCOO UGT-FICA USO FI	Confedem Aminer	Single-employer bargaining
ES	Saint Gobain Placo Iberica	587			X			CCOO UGT-FICA	n.d.	Single-employer bargaining
FI	Terrafame Oy	754		X				Teollisuusliitto (probably) YTN (probably) Pro (probably)	Finnish Technology Industries/FinnMinn	Probably multi-employer bargaining
FI	Agnico Eagle	500		X				Teollisuusliitto (probably) YTN (probably) Pro (probably)	Finnish Technology Industries/FinnMinn	Multi-employer bargaining
FR	Lafarge (08)	1,450			X	X		CFDT CFE-CGC BTP (SICMA) FNSCBA-CGT CGT-FO	Unicem	**Both**

Member State	Name of largest employers in the sector	Estimated number of (sector-related) employees	Parts of the sector covered					Name of trade union(s) organising the employees in the enterprise/company	Name of employer organisation(s) to which this employer is affiliated	Type of collective bargaining applied to this employer (single-employer, multi-employer or both)
			5.1–2 Hard coal/lignite	7 Metal minerals	8 Construction minerals/aggregates	8 Industrial mineral	9 Mining support service activities			
	Cemex (08)	1,000			X	X		CFDT CFE-CGC BTP (SICMA) FNSCBA-CGT	Unicem	**Both**
HR	Golubovečki kamenolom d.o.o.	77			X			SGH	n.d.	Single-employer bargaining
HR	Wienerberger Ilovac d.d.	60			X			SGH	n.d.	Single-employer bargaining
HU	Lasserberger Hungaria Ltd	294			**X**			BDSZ Lasselsberger Hungaria Ltd. Nyékládháza Trade Union Committee (BDSZ member union)	MBSZ	Single-employer bargaining (company-level union with the employer)
HU	KÖKA Kő- és Kavicsbányászati Kft (KÖKA Quarrying and Gravel Mining Ltd)	221			**X**	**X**		BDSZ – KÖKA Quarrying and Gravel Mining Ltd Trade Union Committee Union of Ore and Mineral Workers (BDSZ member union)	MBSZ	Single-employer bargaining (company-level union and employer; BDSZ supports the process with expertise and legal support)
IE	Boliden Tara Mines	570		X				SIPTU Unite Connect	Ibec	Single-employer bargaining
IE	Roadstone	350			X			SIPTU Unite Connect	n.d.	Single-employer bargaining
IT	Unicalce	n/a			X (lime)			n/a	Confindustria Federbeton	Multi-employer bargaining
LT	UAB Klasmann-Deilmann Šilutė	215				08.92		LBMAĮDPS	LD	Single-employer bargaining
LT	AB Dolomitas	210			08.12			n/a	Association of Lithuanian Quarries	-

Member State	Name of largest employers in the sector	Estimated number of (sector-related) employees	Parts of the sector covered					Name of trade union(s) organising the employees in the enterprise/company	Name of employer organisation(s) to which this employer is affiliated	Type of collective bargaining applied to this employer (single-employer, multi-employer or both)
			5.1–2 Hard coal/lignite	7 Metal minerals	8 Construction minerals/aggregates	8 Industrial mineral	9 Mining support service activities			
LU	Cloos SA	50–249			X	X		OGB-L LCGB-Indusid	No employer organisation or business association in the sector	Single-employer bargaining
LV	Pindstrup Latvia SIA	414				X (peat)		None	LKA	n/a
	Laflora	291				X (peat)		None	LKA	n/a
MT	Bonnici Brothers	Approx. 50			X			n/a	MDA	n/a
	Schembri Brothers	Approx. 50			X			n/a	MDA	n/a
NL	Fugro N.V.	8,484					X	None	None	None
	Royal Dutch Shell	3,864					X	FNV CNV	VNONCW	Single-employer bargaining
PL	PGG (holding group)	40,000	X					There are many trade unions.	The company is only affiliated to a business association (GIPH).	Single-employer bargaining (there is no single agreement; the current company is the result of sector restructuring, and the provisions of earlier agreements remain in force)
	KGHM Polska Miedź (holding group)	20,000		X				There are many trade unions.	Związek Pracodawców Polska Miedź	Single-employer bargaining
PT	Somincor	1,251		X				STIM, affiliated to Fiequimetal	ANIET	Single-employer bargaining
	Almina	500		X				STIM, affiliated to Fiequimetal	None	No information
RO	Societatea Nationala a Sarii SA	1,617			X	X		FNS Salroca, Sindicat Astraia	PAT RO MIN	Single-employer bargaining

Member State	Name of largest employers in the sector	Estimated number of (sector-related) employees	Parts of the sector covered					Name of trade union(s) organising the employees in the enterprise/company	Name of employer organisation(s) to which this employer is affiliated	Type of collective bargaining applied to this employer (single-employer, multi-employer or both)
			5.1–2 Hard coal/lignite	7 Metal minerals	8 Construction minerals/aggregates	8 Industrial mineral	9 Mining support service activities			
	OMV Petrom Global Solutions SRL	1,075					X	Sindicatul National Petrom	Federatia Asociatiilor Companiilor de Utilitati din Energie (ACUE)	Single-employer bargaining
SE	Luossavaara-Kiirunavaara AB	4,000–5,000		X				IF Metall SEF SI Unionen	GAF Svemin	Multi-employer bargaining
	Boliden Mineral AB	3,000–4,000		X				IF Metall SEF SI Unionen	GAF Svemin	Multi-employer bargaining
SI	Premogovnik Velenje	1,164	X					SPESS SDRES	ZDS EZS	Both
	Calcit	165			X			n.d.	n.d.	Multi-employer bargaining
SK	Hornonitrianska bane Prievidza	2,658	X					OZ PBGN	ZHŤPG	Single-employer bargaining
	Slovenské magnezitové závody	500–999				X		OZ PBGN	ZHŤPG	Single-employer bargaining

Note: *n/a = not applicable; n.d. = no data.*

Source: *Network of Eurofound Correspondents, 2021*

Annex 2: Network of Eurofound Correspondents

Table 63: Network of Eurofound Correspondents who have contributed to this study

Member State	Correspondent(s)	Organisation
AT	Bernadette Allinger	Working Life Research Centre (FORBA)
BE	Dries Van Herreweghe	HIVA – Research Institute for Work and Society, KU Leuven
BG	Rositsa Makelova	Institute of Social and Trade Union Research (ISTUR) and Balkan Institute for Labour and Social Policy
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs
CY	Pavlos Kalosinatos and Alexandros Perdikes	Cyprus Labour Institute of the Pancyprian Federation of Labour (NEK-PEO)
DE	Sandra Vogel Birgit Kraemer	German Economic Institute Institute of Economics and Social Sciences (WSI)
DK	Maria Hansen and Frida Lilli Schlanbusch Nørkjær	Employment Relations Research Centre (FAOS), University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Penny Georgiadou	Labour Institute of the General Confederation of Greek Workers (INE GSEE)
ES	Oscar Molina	Institute for Labour Studies, Universitat Autònoma de Barcelona
FI	Amanda Kinnunen	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejakovic and Irena Klemencic	Institute of Public Finance (IPF)
HU	Nóra Krokovay and Szilvia Borbély	Kopint-Tárki Institute for Economic Research
IE	Andy Prendergast	IRN Publishing
IT	Anna Mori	Department of Social and Political Sciences, University of Milan
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
LV	Krišs Karnītis	EPC Ltd
MT	Christine Scerri	University of Malta
NL	Pim Zijlstra and Thomas de Winter	Panteia BV
PL	Barbara Surdykowska	Foundation Institute of Public Affairs
PT	Reinhard Naumann	Friedrich-Ebert-Stiftung (Lisbon)
RO	Victoria Stoiciu and Nicoleta Voicu	Association Centre for Public Innovation
SE	Anna-Karin Gustafsson	Oxford Research AB
SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Rastislav Bednarik	Institute for Labour and Family Research

EF/23/025

TJ-01-24-012-EN-N

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

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the EU Member States. This study assesses the representativeness of IndustriAll Europe, representing trade unions in the extractive industries sector, and Euracoal, Euromines, IMA-Europe, Aggregates Europe – UEPG, and APEP, representing the employers and companies, in the European sectoral social dialogue committee for extractive industries.

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

Publications Office
of the European Union

ISBN 978-92-897-2449-4
doi:10.2806/1024192