

Studienbeiträge zum European Industrial Relations Observatory (EIRO)



Changing Business Landscape in the Electricity sector and Industrial Relations in Europe

The case of Germany

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Köln, November 2012

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Abstract

In general, industrial relations in the electricity sector are characterised by established collective bargaining rounds for the top electricity producers. It is noteworthy that unions have undertaken efforts to organise employees in the renewable energy sectors and get them covered by collective agreements. However, in the aftermath of the Fukushima nuclear disaster, the German government issued a three-month moratorium on several nuclear power plants. In June 2011, it finally presented its decision to phase out nuclear energy in Germany completely.

1. Background information on the energy policy and employment trends

1.1 Main governmental strategies/action in relation to the electricity production and energy source mix.

In September 2010, the federal government released its Energy Strategy Paper (BMWi / BMU, 2010). Whilst the government prolonged the running time of the 17 then operating nuclear power plants by an average of 12 years, its roadmap also emphasised the need to strengthen the position of, and increase the share of, energy from renewable resources.

However, after the earthquake and subsequent nuclear disaster in Japan in March 2011, the German government first issued a moratorium and shut down seven power plants. It then asked the Ethics Commission and the Reactor Safety Commission to assess the risks of German nuclear power (plants). In June 2011 a new strategy paper on the future energy mix was presented by the government. It states that nuclear power generation is to be phased out by 2022 and replaced by a mixture of renewable resources. Those plants already shut down will not go on-line again, whilst the remaining plants will be phased out between the end of 2015 and 2022.

The government calculates in its new strategy paper that the closure of the German nuclear power plants also means faster implementation of the goals set in the Energy Strategy Paper of September 2010. The basic target highlighted in this plan remains unchanged: by 2020 greenhouse gas emissions are to be reduced by 40% over against the benchmark year of 1990, leading to a final reduction of between 80% and 95% by 2050.

The government also announced targets for the energy mix: Electricity produced by RES currently accounts for 17% of gross consumption. This is to be increased to 35% by 2020. It should be noted that electricity consumption is also to be reduced by 10% by 2020. The strategy paper also highlights wind energy as the future growth market for RES. However, it does not describe a specific target. Furthermore, the strategy paper stresses that power from fossil fuels is to play a greater role in the future.

As the government's strategy paper states, grid expansion will be regulated and coordinated under the revised Energy Industry Act (*Energiewirtschaftsgesetz*, EnWG) and a Grid Expansion Acceleration Act (*Netzausbaubeschleunigungsgesetz*, NABEG) is also

planned. Whilst grid expansion is promoted, specific goals were not mentioned in the paper.

The official statistics do not offer a breakdown of employment figures by all three energy sources mentioned. However, the Federal Employment Agency (Bundesagentur für Arbeit, BA) provides data for employees liable to social security contributions. As of December 2009, 31,129 persons were employed in the coal sector, 3,075 in the crude petroleum and natural gas sector and 238,505 in the energy supply sector. Due to a change in the statistical dataset and the classification system used by BA, these figures are not comparable to those of 2005.

The Federal Ministry for the Environment, Nature Conservation and Nuclear Safety (Bundesministerium für Umwelt, Naturschutz und Reaktorsicherheit, BMU) has undertaken research on the development of employment in the RES sector. Their estimations indicate that employment rose from 160,500 persons in 2004 to 367,400 persons in 2010 (BMU, 2011c).

1.2 Government policy for increase of the share of renewable resources according to the RES directive

The Renewable Energy Resources Act (Eneuerbare Energie Gesetz, EEG) regulates the purchase of electricity exclusively generated from RES, the obligation to transmit and therefore the use of grid connections. The act stipulates feed-in tariffs for electricity generated from RES. It should be noted that these tariffs vary according to the different sources of renewable energy. The German Association of Energy and Water Industries (Bundesverband der Energie- und Wasserwirtschaft, BDEW) highlights in a paper on renewable energy that in 2011, plants covered by EEG will receive some € 12 billion in subsidies (compared to some € 3.3 in 2006) (BDEW, 2010).

As stated above, the sum of aid generated for RES-plants under the EEG rose between 2006 and 2011. In a press statement from 2 February 2011, the BMU however explains changes in privileging RES electricity providers (BMU, 2011a). Subsidies for the solar industry will be cut down.

In August 2011, the federal government adopted its sixth energy research programme (BMU, 2011b). From 2011 to 2014 some € 3.4 billion is to be made available for investment in the following major research areas: renewable energy, integration of RES into the energy supply system, grids, energy efficiency and energy storage.

It is noteworthy that, as recently September 2010, before redirecting its policy in the wake of Fukushima, the federal government had actually prolonged the running time of nuclear plants. At that time, the government came to an agreement with power plant owners that part of the extra profits generated from the longer running time would be paid into the Energy and Climate Fund through the nuclear-fuel tax to be levied between 2011 and 2016. (The E.ON Annual Report 2010 quotes estimates that some € 2.3 billion is to be drawn from this tax.) (E.ON, n.d.).

1.3 Studies and documents assessing the employment impact of energy policies and of prospective changes in the energy mix within the electricity sector

The BMU has presented its research on the future employment development in the RES sector. It estimates that, provided that RES companies are successful on the global market, employment at such companies will amount to 520,000 to 640,000 persons in 2030 (BMU, 2011c). However, further information on the future influence of the change in the energy mix on the employment situation of workers in the sector is not yet available.

1.4 Social partners involvement in the governmental energy policy (in relation to employment impacts)

The social partners comment on the government's energy policy. However, so far no special tripartite social dialogue body has been established to deal with energy issues. For further initiatives on the part of the social partners, see section 4.3.

2. Composition, structure and employment trends for the different resources used for electricity production

2.1 Overview of the current sectoral composition of electricity production

A special report issued by the Monopolies Commission in September 2011 shows that the electricity market is dominated by four private companies, E.ON, RWE, EnBW and Vattenfall, which together held a market share of nearly 80% in 2009 (Monopolkommission, 2011). Whilst all of them have affiliates dealing with the different sources of electricity production, apart from the information for nuclear power (see table below), their single market shares cannot be fully analysed. Instead of filling in the table below, I will therefore briefly describe the current situation at the four biggest companies in Germany.

E.ON: The corporation operates facilities in Europe, North America and Russia. E.ON's annual report for 2010 highlights rising electricity sales. Sales increased by 31%, totalling 1,030.4 billion kWh in 2010, of which, according to its website, the group's own plants generated 275.5 billion kWh in 2010 (compared to 270.0 billion kWh in 2009). According to E.ON, its energy is generated from the following sources: natural gas 35%, nuclear energy 26%, coal 23%, hydro 6%, lignite 5%, wind energy 3% and another 2% from other sources. The total number of employees remained stable between 2009 and 2010 at 85,108 and 85,105 respectively, most of them in Germany (35,116 employees in 2010).

RWE: As its 2010 Annual Report highlights, external sales in electricity and gas amounted to 311.2 and 395.4 billion kWh respectively (RWE, 2011). In the 2010 financial year, the company itself generated 225.3 billion kWh (187.2 billion in 2009). The single energy sources were lignite (32%), hard coal (25%), nuclear (20%), gas (19%)

and renewable energy (4%) in 2010. It should also be noted that the company bought 112.8 and 104.4 billion kWh from other parties in 2009 and 2010 respectively. In 2010, RWE employed 70,856 persons, up from 70,726 in 2009 (full-time equivalents). The company's market is mainly European, with most sales being made in Germany, the Netherlands, the United Kingdom and countries in South Eastern and Central Eastern Europe.

EnBW: The group sold 119.7 and 146.9 billion kWh of electricity in 2009 and 2010 respectively. Sales of gas amounted to 65.8 and 53.6 billion in the same years. Its Annual Report 2010 indicates that 7.1 billion kWh came from the company's own generation of renewable energy (EnBW, 2011). Employee numbers fell from 21,124 in 2009 to 20,952 in 2010 (as of 31 December 2009 and 2010). EnBW focuses its business on Baden-Württemberg in Germany and other European markets. This is reflected in the location of its employees. As EnBW states, 73.2% of its staff worked in Baden-Württemberg and 19.3% in other German states in 2010. Only 7.5% were employed in other countries, such as the Czech Republic.

Vattenfall Europe: The company is 100% owned by the Swedish state. Its core markets are Sweden, Germany and the Netherlands. As its Annual Report 2010 indicates, 63.3 and 44.5 TWh of gas and heat were sold in 2010 (Vattenfall, 2011). Electricity generation amounted to 172.5 TWh in 2010. The majority of electricity was produced from coal (44%), followed by nuclear power (25%), hydro power (21%), natural gas (8%), with wind energy and biomass accounting for 1% each. In 2010, Vattenfall employed 38,179 (down from 40,026 in 2009). Figures refer to full-time equivalents.

Electricity production				
Electricity production with	TOP 3 PRODUCING COMPANIES (the largest 3 in market share)	NUMBER OF EMPLOYEES	Reference year for the number of employees	Private/Public STATUS of WORKERS
FOSSIL FUELS	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
NUCLEAR (data from the atw refers to the gross electricity production of the single power plants, reporting date: 31 December 2010)	E.ON	Only total numbers available (see above)	See above	private
	EnBW	Only total numbers available (see above)	See above	private
	RWE	Only total numbers available	See above	private

		(see above)		
HYDRO	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
WIND	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
BIOMASS	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
PHOTO-VOLTAIC	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.	n.a.

2.2 Overview of the current organisation of electricity distribution

Germany has no single exclusive distributing company. The firms Tennet, 50 Hertz Transmission, Amprion and the grid affiliates of EnBW operate the high-voltage grids, dividing up the business by region. However, a multitude of other companies operate the local grids.

2.3 Three largest distributing companies (NUMBER OF EMPLOYEES, public or private STATUS of the EMPLOYMENT RELATIONSHIP)

Since there are only four operators of high-voltage grids, I have listed all four in the following table.

Distribution companies				
	TOP 3 DISTRIBUTING COMPANIES (the largest 3 in market share)	NUMBER OF EMPLOYEES	Reference year for the number of employees	Private/Public STATUS of WORKERS
Distribution GRID	Tennet	Around 750	Information from company website as of Nov. 2011	n.a.
	50 Hertz Transmission	643	As of 31. Dec. 2010 (according to compa-	n.a.

			ny website)	
	Amprion	850	Information from company website as of Nov. 2011	n.a.
	EnBW's grid affiliates EnBW Transportnetze and EnBW Regional	EnBW Transportnetze: 100 (as stated in the company brochure from October 2007) EnBW Regional: in 2010 3,149 staff (according to the company)	Information from company website as of Nov. 2011	n.a.

2.4 Significant developments/changes since 2008 for a specific company or source of electricity production in numbers of employees or in their public/private status

In the course of 2011 all the major producers - Vattenfall, RWE, E.ON and EnBW - have claimed to be suffering from the federal government's decision to phase out nuclear power in Germany. However, between 2008 and the government's decision, all four companies had already introduced cost-saving and/or restructuring programmes and had also undertaken unbundling activities. Amongst other things, RWE, Vattenfall and E.ON have sold their high-voltage grids, which are now operated by Amprion, Tennet and 50 Hertz Transmission. In some cases, job cuts have also been on the agenda. Further details are presented in section 4.2.

3. Industrial relations in the electricity sector: Actors

3.1 Details on the membership in the electricity sector and membership of the top 3 producing and distributing companies in employer's organisation

As I cannot name the top 3 producers for the single subsectors, I will nonetheless list the currently existing collective agreements for the four major producers in Germany, the organisations which represented them in the negotiations and the unions with which they were concluded. However, information on membership densities across the different subsectors or on the membership levels of the unions in single companies is not available.

E.ON: is part of the Energy Collective Bargaining Association (*Tarifgemeinschaft Energie*) comprising the employer organisations *Arbeitgebervereinigung energiewirtschaftlicher Unternehmen* (AVE) and the *Arbeitgebervereinigung Bayerischer Energieversorgungsunternehmen* (AGV). The latest collective agreement was concluded with the United Services Union (Vereinte Dienstleistungsgewerkschaft, ver.di) and the Mining, Chemicals and Energy Industrial Union (Industriegewerkschaft Bergbau, Chemie, Energie, IG BCE) in June 2011.

Vattenfall: For Vattenfall Europe another collective bargaining association was set up in which the active employer organisations are the *Arbeitgeberverband energie- und versorgungswirtschaftlicher Unternehmen* (AVEU) and the *Bundesverband Braunkohle*, the German federal association of all lignite producing companies (DEBRIV). Again ver.di, IG BCE and IG Metall negotiate collective agreements for employees at Vattenfall.

RWE: is part of the RWE Collective Bargaining Group, in which it is joined by the employer organisation *Arbeitgeberverband von Gas-, Wasser- und Elektrizitätsunternehmen* (AGWE). Collective agreements are negotiated by ver.di and IG BCE.

EnBW: the currently effective wage agreement was negotiated by the regional employer organisation *Arbeitgeberverband der Elektrizitätswirtschaft Baden-Württemberg* and ver.di.

Trade union representation and Membership to employers' organisation			
FOSSIL FUELS	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
NUCLEAR	E.ON	See above.	See above.
	EnBW	See above.	See above.
	RWE	See above.	See above.
HYDRO	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
WIND	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
BIOMASS	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
PHOTO-VOLTAIC	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.

And in the distributing companies			
Distribution GRID companies	Tennet	Ver.di, IG BCE	Part of the Energy Collective Bargaining Association (see above)
	50 Hertz Transmission	IG BCE	Single employer collective agreement
	Amprion	Ver.di, IG BCE	Part of collective bargaining group RWE (see above)
	EnBW's grid affiliates EnBW Transportnetze and EnBW Regional	Ver.di.	regional employer organisation <i>Arbeitgeberverband der Elektrizitätswirtschaft Baden-Württemberg</i>

3.2 Extent of employee' coverage in the different subsectors (fossil/nuclear/RES) by trade union representation

The energy sector is mainly the domain of ver.di, IG BCE and the German Metalworkers' Union (Industriegewerkschaft Metall, IG Metall). Apart from falling membership figures for all three unions (Dribbusch, 2011b), further details on the unions' representation in the different subsectors are not available.

3.3 Major reorganisations/splits/mergers of trade unions or employers organisations in the sector during the last five years

No, no major reorganisations have occurred during the last five years with regard to the above mentioned unions or the employer organisations in the sector.

3.4 New actors (trade unions or employers organisations) been founded in recent years

There have been no new unions or employer organisations. However, in 2006, the Federal Employer Association of the Solar Sector (Bundesverband Solarwirtschaft, BSW) was set up by a merger of the two organisations previously representing the solar industry in Germany. BSW is, however, not involved in collective bargaining and has to be considered a business association rather than an employer organisation as such.

3.5 Extension of representation by established sectoral actors (both trade unions and employer organisations)

IG Metall has called for greater action and is trying to organise workers in the renewable energy sector, e.g. solar and wind energy. The union gives examples of successfully concluded single-employer agreements or of setting up works councils in companies in the respective industries. However, it has not yet been able to conclude a sectoral collective agreement for the solar or wind energy industries.

Concerning the employer associations, it is noteworthy that the association for the glass industry decided to set up a unit for the solar industry in 2008, a step reflected in a

change of name to the Association for the German Glass and Solar Industry (Bundesarbeitgeberverband Glas und Solar, BAGV Glas+Solar). In 2010, BAGV Glas+Solar represented a total of 125 companies.

4. Role of collective bargaining and social dialogue

4.1 Structure of collective bargaining in the electricity sector

Collective agreements in the electricity sector are concluded at different levels. Both single-employer and multi-employer collective agreements exist. However, a distinction needs to be made between the private electricity companies and those in public ownership. The Municipal Employers' Association (Vereinigung der kommunalen Arbeitgeberverbände, VKA) and the unions ver.di and ddb tarifunion negotiated a collective wage agreement for employees of municipal energy providers in 2010. For a list of currently effective collective agreements at the top four producers see section 4.2.

The Institute for Employment Research (Institut für Arbeitsmarktforschung, IAB) uses data from its establishment panel (IAB-Betriebspanel) to estimate collective bargaining coverage. According to the latest data, 75% and 49% of the employees in western and eastern Germany respectively were covered by a sectoral collective agreement in the energy, water supply, waste disposal and mining sectors in 2010. This compares to 15% and 24% of employees in the same sectors who were covered by a company-level agreement.

When it comes to the collective bargaining coverage of establishments in the above-mentioned sectors, it should be noted that 61% in western and 26% in eastern Germany were covered by a branch-level collective agreement in 2010. Another 6% (western Germany) and 7% (eastern Germany) had a company-level agreement in place. Please note that, in 2010, out of those 33% of western and 67% of eastern German establishments not covered by any collective agreement, 60% and 31% respectively were oriented towards a collective agreement.

A further breakdown by subsector is not available.

4.2 Most recent collective agreements reached at sector level and at company level

The Federal Statistical Office (Statistisches Bundesamt Deutschland, destatis) announced in June 2011 that collectively agreed wages in the private economy had risen by 1.8% in 2010 over the previous year (destatis, 2011). Similarly, data from the WSI Collective Agreement Archive shows that collectively agreed wages coming into effect in 2011 rose by an average of 2% (Dribbusch, 2011a). As shown in the table below the wage increases agreed upon by the social partners at the four major energy producers in Germany were higher.

I have listed the results of the currently effective single collective bargaining agreements in the table below.

Currently effective collective agreements at the top electricity producers			
	Wage development	Running time	Affected employees
Collective bargaining association Energy, including E.ON (AVE, AGV) – ver.di, IG BCE and IG Metall	Wage increase by 3.2% (from June 2011 onwards) and another 1.7% (from June 2012 onwards) (ver.di, 2011a)	19 months from 1 June 2011	Around 30,000 employees at E.ON group
Collective bargaining association Vattenfall Europe (AGWE, DEBRIV) – ver.di, IG BCE, IG Metall	Wage increase by 3.4% (ver.di, 2011c)	13 months from 1 January 2011	Around 20,000 employees at Vattenfall Europe
Collective bargaining group RWE (AGWE) – ver.di, IG BCE	Wage increase by 3.4% (ver.di, 2011b)	13 months from 1 November 2010	Around 26,000 employees at RWE group
regional employer organisation Arbeitgeberverband der Elektrizitätswirtschaft Baden-Württemberg (also covering EnBW) – ver.di	Wage increase by 3.4% for the first 12 month, another 1.8% for the following nine months	21 months from 1 January 2011	Around 25,000 (at EnBW and other companies in the region)

Concerning the above-mentioned restructuring programmes introduced by some companies, the following compromises between the social partners should be noted:

- 1.E.ON’s management and its works council negotiated several conditions under which its restructuring programme “Perform to Win” introduced in 2009 was to be realised. Enforced dismissals were ruled out and job reduction was to be realised by early retirement schemes, non-renewal of fixed-term contracts, voluntary resignation compensation and natural fluctuation.

In November 2010, E.ON’s new strategy “Cleaner&Better Energy” was launched. By August 2011, the company had to announce losses in its adjusted net income. To remedy the situation, E.ON wants to save an annual € 1.5 billion and to simplify the firm’s organisational structure. E.ON stated that 9,000 to 11,000 jobs might be affected (according to ver.di 6,500 jobs in Germany). Detailed plans, however, have not yet been released. Ver.di has strongly objected to E.ON’s latest plans and announced protests and rallies.

- 2.In February 2010, the union ver.di has reported on the token strikes related to Vattenfall Europe’s plans to cut 1,500 out of around 21,000 jobs (ver.di, 2010). In Germany, the company has signed a collective agreement ruling out direct dis-

missals and employees are therefore protected until the end of 2012. Job cuts are to be realised by an early retirement scheme.

4.3 Cooperation between the social partners and government

In 2006 and 2007, the federal government held three summit meetings on energy issues with representatives from employer organisations, unions, NGOs, research institutions and other organisations. The government also holds round tables, e.g. on the port infrastructure for off-shore wind energy in 2010 (to which representatives of the states, municipalities and the respective industries were invited).

In 2009, the Federal Minister for the Environment initiated a dialogue on 'Environmental protection, business and politics' (*Klimaschutzdialog Wirtschaft und Politik*). Representatives of business and energy associations as well as individual companies took part and a final report was presented in February 2011 (BMU, 2011d).

The social partners have also taken the initiative themselves. To name but a few examples: In October 2010, the BDEW launched a new initiative, the so-called Energy debate. BSW Solar takes part in the European Solar Days. During the last campaign week in May 2011, over 5,600 events were staged to promote the use of solar energy and more than 400,000 participants attended. In February 2008, the Trade Union for Building, Forestry, Agriculture and the Environment (Industriegewerkschaft Bauen-Agrar-Umwelt, IG Bau) joined the Climate Alliance (Klima-Allianz). This alliance calls for a reduction in electricity usage, energy-friendly buildings, climate-friendly electricity production, phase-out of nuclear energy, expansion of RES, etc.

4.4 Views of the trade unions and employer organisations on changes regarding employment and working conditions affecting the sector since 2008

The unions in the industry have highlighted the advantages and pitfalls of the new energy strategy in Germany. In response to the government's decision to phase out nuclear energy in Germany, ver.di has published an information leaflet describing the need to further develop the skills of employees in the industry in preparation for the ongoing and planned modification of the German transmission networks to make them 'smart grids'. ver.di points out that IT and telecommunications skills are gaining in importance and the union wants to foster a debate on future skills needs in energy companies.

Alongside IG Metall, ver.di additionally criticizes the 'poor' collective agreements and co-determination structures in companies in the renewable energy sector. Whilst ver.di wants to set up a campaign which aimed at extending the usual collectively agreed standards and co-determination rights of the energy industry to the renewable energy sector, IG Metall calls for the conclusion of separate collective agreements in the renewable energy sector, e.g. a sectoral collective agreement in the solar industry.

In May 2011, the president of the German Confederation of Employers' Associations (Bundesvereinigung der Deutschen Arbeitgeberverbände, BDA), Dieter Hundt, criticised the moratorium on nuclear power plants issued by the federal government in response to Fukushima. Mr Hundt stated that German industry needed secure conditions to safe-

guard its worldwide competitiveness. He also stressed that Germany, and especially its energy-intensive industries, needed ecological and inexpensive electricity but should not be dependent on electricity imports. All in all, nuclear energy should not be phased out until electricity supply from RES could be guaranteed.

The Federation of German Industries (Bundesverband der Deutschen Industrie, BDI) has also commented on the government's new energy strategy (BDI, 2010). BDI stated that any national energy plan had to serve the customers and the competitiveness of German industry. In this context, the BDI warned against planned increases in energy and electricity taxes which could endanger 'many 100,000s of jobs'. However, BDI also calls for a further expansion of the German grids and greater investments in modernising buildings to make them energy-efficient.

5. Commentary

Industrial relations in the electricity sector are characterised by a multitude of actors. The IAB data on collective bargaining coverage shows that many employees are covered by a sectoral or company-level agreement. As shown above, the major producers RWE, E.ON, Vattenfall and EnBW have collective wage agreements for their companies in place. Finally, it should also be noted that unions such as IG Metall are trying to organise employees especially at solar and wind energy firms.

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Final Questionnaire

1. General background information on the energy policy in your country and employment trends

1.1 Please explain briefly the main governmental strategies/action in relation to the electricity production and energy source mix. In your answer, please include information on the following aspects, where possible:

- Is there an outspoken policy or plan in your country for any kind of change towards an increase or decrease of electricity production with any of the different sources (coal, oil, gas, hydro, eolic, sun, etc.)?
- Which is the targeted energy mix for the future (see material provided)? How, in which subsequent steps, such targets are expected to be met?
- Are investments in networks (new connections, upgrade) envisaged? To what extent? With which specific goals?
- What is the Government stance and what are the ongoing/envisaged action towards generation of electricity from the different broad groups of sources: nuclear /fossile /renewable energy?
- What are the recent employment trends in the different subsectors of power generation according to the different broad groups of sources: nuclear/fossile/renewable energy? Please indicate development since 2005 with reference to generation, distribution, and sale separately.

1.2 Government policy for increase of the share of renewable resources according to the RES directive

- Are any subsidies being granted for different types of RES for electricity providers? If yes, please provide briefly the details
- Have subsidies for RES been cut recently? Was this a result of the crisis, of budget constraints, or the result of a policy revision (following a policy assessment, due to a disproportionate use of subsidies, etc.)? Please provide brief details.
- Are there any other forms of support foreseen for promoting electricity generation of RES?

Please include any other aspects you consider to be worth mentioning regarding the state of play and the future prospects of RES in your country.

1.3 Are there any studies and documents assessing the employment impact of energy policies and of prospective changes in the energy mix within the electricity sector? This could include, for instance,

- Employment effects resulting from the unbundling of activities (production from distribution)
- Employment effects (on quantity and quality of work) resulting from the possible shifts within the electricity production sector from traditional sources to RES
- Employment effects from investments in infrastructure (renewal of grids, introduction of smart meter technology, district heating)
- The need for retraining of workers or provision of new qualifications linked to the sector transformations
- Possible spatial mobility of workers as a result of more decentralised production (linked both to new activities and to restructuring of existing ones)

Please include any other aspects you consider to be worth mentioning regarding prospective impacts on employment and industrial relations

1.4 To what extent are the social partners involved or consulted concerning the governmental energy policy, notably in relation to employment impacts? Has this happened on an ad-hoc basis or on a structural, permanent basis? Is there a special tripartite social dialogue body for such consultations? Did consultation take place at national level, at sector level, or at the initiative of individual companies? Please briefly provide details.

2. Composition, structure and employment trends for the different resources used for electricity production

2.1 Please give an overview of the current sectoral composition of electricity production in your country, by giving for each of these seven groups of energy sources, the NAME of the three largest producing, the NUMBER OF EMPLOYEES of these companies, and the public or private STATUS of the EMPLOYMENT RELATIONSHIP with their employees.

For all companies listed, as a summary, please indicate:

- Total production and its distribution across different energy sources
- Total employment and its distribution across different energy sources
- Production plants and their respective energy source(s)

2.2 Please provide an overview of the current organisation of electricity distribution in your country. Is there a single distributing company/body? Are there multiple companies? At national or territorial level?

2.3 Please indicate the NAME of the three largest distributing companies, the NUMBER OF EMPLOYEES of these companies, and the public or private STATUS of the EMPLOYMENT RELATIONSHIP with their employees.

2.4. Where there any significant developments/changes since 2008 for a specific company or source of electricity production in numbers of employees or in their public/private status? Was this due to the current economic crisis? Were there any instances of unbundling or mergers? With what consequences in terms of employment and industrial relations?

3. Industrial relations in the electricity sector: Actors

3.1 Please provide details on the membership in the electricity sector and membership of the top 3 producing and distributing companies in employer's organisation (see questions 2.1-2.3 above). Please provide information on the name of the trade unions organising in this subsector and the level of their membership, or otherwise provide overall data but please include indications on differences in membership densities across subsectors.

3.2 To what extent are employees in the different subsectors (fossil/nuclear/RES) covered by trade union representation? Has there been any impact of the crisis on trade union representation?

3.3 Have there been major reorganisations/splits/mergers of trade unions or employers organisations in the sector during the last five years?

3.4 Have new actors (trade unions or employers organisations) been founded in recent years, especially in the newly evolving RES industries? Or is the industry covered by established actors?

3.5 Have the established sectoral actors (both trade unions and employer organisations) started any initiative to extend their representation to the new emerging parts of the sector? Please describe such initiatives and their results so far.

4. Role of collective bargaining and social dialogue

4.1 Please provide information on the structure of collective bargaining in the electricity sector. Please, briefly mention the main characteristics of collective bargaining:

- At what level are collective agreements within the subsectors of the electricity sector (traditional providers, newly emerging providers) concluded (company, sectoral level and/or inter-sectoral level)? Is there a difference between the producers and the distributors?
- Estimate the coverage rate of collective bargaining in terms of companies and employees: are there any differences in coverage across different subsectors of electricity production?

4.2 Please comment on the most recent collective agreements reached at sector level and at company level. Please address the following topics:

- Pay and working time: level and trends relative to the national average and significant differences across subsectors of the electricity industry.

4.3 Cooperation between the social partners and government

- Have the government started any social dialogue or social concentration in the electricity sector since 2008? Please illustrate the features and results of any such initiatives.
- Have bipartite and/or tripartite bodies dealing with specific issues of the electricity industry been created since 2008?
- Have there been since 2008 any joint initiatives of cooperation between social partners to influence or steer the energy policy developed by the government in your country? Or have such initiatives been taken separately by certain social partner organisations?
- Have the social partners been involved in the making of the national action plan to reach the 2020 target, or in issues aiming to secure the supply of enough electricity?

4.4 Please provide information about the views of the trade unions and employer organisations on the main changes regarding employment and working conditions affecting

the sector since 2008 and especially on the impact of the current crisis (for instance on employment trends, quality of jobs, working hours, wages, fixed-term employment, part-time, temporary agency work, participation in training, outsourcing, subcontracting etc.).

5. Commentary