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**STUDY ON THE REPRESENTATIVENESS OF THE SOCIAL PARTNER ORGANISATIONS
IN THE SHIPBUILDING INDUSTRY: SUMMARY**

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STAFF WORKING ON THIS STUDY

Author of the report

Delphine ROCHET, researcher

Coordinators

Prof. Armand SPINEUX and Prof. Evelyne LEONARD

Research Team

Prof. Bernard FUSULIER

Prof. Pierre REMAN

Alexandre CHAIDRON, researcher

Isabelle VANDENBUSSCHE, researcher

Administrative co-ordination

Marie-Anne SAUSSU and Myriam CHEVIGNE

Network of National Experts

Austria: Franz Traxler, Institut für Soziologie – Universität Wien

Belgium: Jean Vandewattyne, Université Libre de Bruxelles (ULB)

Bulgaria : Rumiana Gladicheva, Department of Sociology - Sofia University

Cyprus: Savvas Katsikides, Maria Modestou and Evros I. Demetriades, Department of Social and Political Science – University of Cyprus

Czech Republic: Ales Kroupa, Research Institute for Labour and Social Affairs – Charles University of Prague

Denmark: Carsten.Jorgensen, Forskningscenter for Arbejdsmarkeds- og Organisationsstudier, FAOS – Department of Sociology, University of Copenhagen

Estonia: Kaia Philips and Raul Eamets, University of Tartu

Finland: Pekka Ylostalo, University of Helsinki, Department of Sociology

France : Solveig Grimault, Institut d'Études Politiques de Paris

Germany: Dieter Sadowski, Catharina Leilich, Oliver Ludewig, Mihai Paunescu, Martin Schneider and Susanne Warning, Institut für Arbeitsrecht und Arbeitsbeziehungen in der Europäischen Gemeinschaft, IAAEG – Universität Trier

Greece: Aliko Mouriki, National Center for Social Research – Athens

Hungary: Csaba Makó, Institute of Sociology, Hungarian Academy of Sciences

Ireland: Pauline Conroy, Ralaheen Ltd

Italy: Franca Alacevich and Andrea Bellini, Università degli studi di Firenze – Dipartimento di scienza della politica e sociologia politica

Latvia: Alf Vanags, Baltic International Centre for Economic Policy Studies

Lithuania: Mark Chandler, EuroFaculty Vilnius Centre, Ekonomikos fakultetas, Vilniaus universitetas

Luxembourg : Franz Clément, Centre d'Études de Populations, de Pauvreté et de Politiques Socio-Economiques (CEPS – INSTEAD).

Malta: Saviour Rizzo and Manwel Debono, Workers' Participation Development Centre, Department of Sociology

Netherlands: Marc van der Meer, Amsterdam Institute for Advanced Labour Studies, University of Amsterdam and Marian Schaapman, Hugo Sinzheimer Instituut, University of Amsterdam

Poland: Pierre Gréga, Coopération Technique Belge (CTB s.a.).

Portugal : Marinus Pires de Lima and Ana Guerreiro, Universidade de Lisboa – Instituto de Ciências Sociais – Instituto Superior de Ciências do Trabalho e da Empresa (ISCTE)

Romania : Ion Glodeanu, Sociology Institute – Romanian Academy

Slovakia: Lubica Bajzikova and Helena Sajgalikova, Faculty of Management, COMENIUS UNIVERSITY

Slovenia: Alenka Krasovec, University of Ljubljana

Spain: Ramon De Alos-Moner Vila, Universitat Autònoma de Barcelona – Grup d'Estudis Sociològic sobre la Vida Quotidiana i el Treball

Sweden: Dominique Anxo, Center for European Labour Market Studies (CELMS) – Department of Economics – Göteborg University

The United Kingdom: David Marsden, London School of Economics

Turkey: Zeki Parlak, Department Labour Economics and Industrial Relations, Faculty of Economics and Administrative Science, University of Marmara

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ABBREVIATIONS

Organisations' abbreviations:

AWES:	Association of European Shipbuilders and Shiprepairers
BIAC:	Business and Industry Advisory Committee to the OECD
CEC:	European Confederation of Executives and Managerial Staff
CECOP:	European Confederation of Workers' Co-operatives, Social Co-operatives and Participative Enterprises
CEEMET:	Council of European Employers of the Metal, Engineering and Technology-Based industries
CEFIC:	European Chemical Industry Council
CEI-BOIS:	European Confederation of Woodworking industries
CEN:	European Committee for Standardization
CESA:	Community of European Shipyards' Associations
CESI:	European Confederation of Independent Trade Unions
COGECA:	General Confederation of Agricultural Co-operatives in the European Union
ECEG:	European Chemical Employers Group
EFBWW:	European Federation of Building and Woodworkers
EFFAT:	European Federation of Food, Agriculture and Tourism
EICTA:	European Information & Communications Technology Industry Association
EMCEF:	European Mine, Chemical and Energy Workers' Federation
EMEC:	European Marine Equipment Council
EMF:	European Metalworkers' Federation
EPSU:	European Federation of Public Service Unions
ETF:	European Transport Workers' Federation

ETUC:	European Trade Union Confederation
ETUFTCLF:	European Trade Union Federation for Textile, Clothing, Leather and Footwear
EuPC:	European Plastics Converters
EURMIG:	European Union Recreational Marine Industry Group
Eurocadres:	Council of European Professional and Managerial Staff
FEANI:	European Federation of National Engineering Associations
FECER:	European Federation of Executives in the Sectors of Energy and Research
FEM:	European Federation of Materials Handling and Storage Equipment
FICT:	Fédération Internationale des Cadres et des Transports
ICA:	International Co-operative Alliance
ICCA:	International Council of Chemical Associations
ICEM:	International Federation of Chemical, Energy, Mine and General Workers' Unions
ICFTU:	International Confederation of Free Trade Unions
ICOMIA:	International Council of Marine Industry Associations
IFBSO:	International Federation of Boat Show Organisers
IFBWW:	International Federation of Building and Woodworkers
IMF:	International Metalworkers' Federation
IMO:	International Maritime Organisation
IOE:	International Organisation of Employers
IOF:	International Officers Forum
ITF:	International Transport Workers' Federation
ITGLW:	International Textile, Garment and Leather Workers' Federation
IUF:	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations
ORGALIME:	European Federation of Engineering Industrial Associations

RIOST: International Network of Subcontracting, Industrial Cooperation and Partnership Organizations
UEAPME: European Association of Craft, Small and Medium-sized Enterprises
UNI: Union Network International
UNICE: Union of Industrial and Employers' Confederations of Europe
WCL: World Confederation of Labour
WEM: Western European Metal Trades Employers Organisation

INTRODUCTION

Presentation of the study

This report has been produced as part of the research into the institutional representativeness of social partners in the European Union, and the situation of trade unions and employers' associations in the candidate countries. The research has been conducted by the Institut des Sciences du Travail (Université catholique de Louvain) at the request of the Employment and Social Affairs Directorate-General of the European Commission (Call for tenders No VC/2004/0547).

The issue of the representativeness of European organisations came to the fore in the context of the promotion of social dialogue. In a communication published in 1993¹, the European Commission set out three criteria determining the access that employers' and workers' organisations had to the consultation process under Article 3 of the Agreement on Social Policy. According to the terms of this communication, the organisation must: (1) *be cross-industry or relate to specific sectors or categories and be organised at European level;* (2) *consist of organisations which are themselves part of the social partners structures of Member States which have the capacity to negotiate agreements, and which are representative of all Member States, as far as possible;* (3) *have adequate resources to ensure their effective participation in the consultation process.* In 1996, it adopted a consultation document² that sought to bring together the widest range of views on the measures to be employed in fostering and strengthening European social dialogue. At that point, given that the social partners at European level were, and still are, in the process of structuring themselves and accepting new applications for membership, the European Commission conducted a study on the representativeness of inter-professional and sector organisations in the European Union, and in a new communication³ in 1998, announced the measures that it proposed to take in order to adapt and promote social dialogue at European Union level. In it, the Commission reaffirmed the three criteria established by the 1993 Communication, permitting European organisations to be recognised as representative for consultation purposes under Article 3 of the Social Policy Agreement. Finally, in 2002, the Commission reaffirmed its support for a strengthening of social dialogue in its communication *The European social dialogue, a force for innovation and change*⁴. In the respect of the three criteria set up by the Commission, as has been pointed out in previous studies⁵, *the changes focus on the disappearance of demands relating to the inter-sector nature of organisations and on the fact that they are established in all Member States; the new rules have not been formulated in a very restrictive manner, they only require employers' and workers' organisations to represent "several" Member States. This relaxation of the implementation condition might pose a demarcation problem in the sense that there is no criterion setting out a minimum number of Member States to activate it.*

Against this background, it is clear that one of the main issues, both for the Commission and for the European social partners, is the enlargement of the European Union and its impact on the process of social dialogue at Community level: *The Communication underlines the vital role and the weaknesses of social dialogue in the candidate countries. Much has been achieved over the*

¹ COM(93) 600 final of 14 December 1993, Communication from the Commission concerning *the application of the Protocol on Social Policy*.

² COM(96) 448 final of 18 September 1996 concerning *the development of the social dialogue at Community level*.

³ COM(98) 322 final of 20 May 1998, Communication from the Commission, *Adapting and promoting the Social Dialogue at Community level*.

⁴ COM(2002) 341 final of 26 June 2002, Communication from the Commission, *The European social dialogue, a force for innovation and change*.

⁵ Spineux A., Walthery P. et al., *Report on the representativeness of European social partners organisations*, Report coordinated by the Institut des Sciences du Travail of the Université catholique de Louvain, for the European Commission, Directorate General for Employment, Industrial Relations and Social Affairs, Louvain-la-Neuve, 1998.

past decade with the support of Community programmes and initiatives. However, a lot remains to be done to strengthen the capacities of social partners and involve them in the accession process⁶. As far as the European Commission is concerned, it is only with sufficiently robust national structures that the social partners will be able to participate effectively in negotiations and in other European social dialogue activities and also implement agreements at national level⁷.

The development of social dialogue, therefore, formed part of the “*acquis communautaire*”(community achievement): *The Treaty requires that social dialogue be promoted and gives additional powers to the social partners. The candidate countries are, therefore, invited to confirm that social dialogue is accorded the importance required and that the social partners are sufficiently developed in order to discharge their responsibilities at European Union and national level, and to indicate whether they are consulted on legislative drafts relating to the taking over of the employment and social policy acquis... Therefore, the development not only of tripartite structures but also of autonomous, representative bipartite social dialogue is an important aspect for the future involvement of the candidates countries' social partners in the social dialogue activities developed at European and national level*⁸.

Enlargement of the European Union is a major issue from a quantitative and qualitative point of view: *The quantitative leap is quite clear as soon as the number of partners rises. The delegations taking part in social dialogue will be enlarged, and that, as we know, does not facilitate dialogue. However, the leap is also qualitative in that the new entrants present the industrial relations systems they have inherited from their national histories*⁹.

The aim of the report is to produce a study that sets out both brief descriptions of the way that social dialogue functions in the countries concerned, and descriptions of the various workers' and employers' organisations involved in social dialogue at sector level. This study may be seen as a tool to help understand these quantitative and qualitative factors.

Research approach and comments on methodology

For the purposes of this study, a network of University researchers throughout the 25 European Union Member States and candidates countries was set up. These researchers are independent of both the European Commission and employers' and workers' organisations. Each researcher was charged with drawing up a report based on a common template. A questionnaire tailored to the specific realities of the shipbuilding industry sector was elaborated to that effect. Each national report issued by the expert was submitted to the national organisations in order to enable them to make comments on collected data. The IST took charge of coordinating the study and drawing up the summaries. Constant communication and ongoing collaboration between the IST, national experts and national organisations takes place in order to associate the various players of the process of research. The report is also checked by the European organisations and their members in order to enable them to make comments on the report. This phase of consultation represents an important stage of research. Lastly, the report is checked by the European Commission's services. The IST wishes to stress its independence with regard to the political consequences and decisions which may be made on the basis of this study.

The research process, in its design, comprises a phase of collection of data on the players and the social dialogue in which they participate, but also an active approach embracing the building of a consensus, which is an integral part of the process of social dialogue itself. Thus, whereas in a good number of cases the data collected do not permit total definition of the role played by

⁶ COM(2002) 341 final of 26 June 2002, Communication from the Commission, *The European social dialogue, a force for innovation and change*.

⁷ Op cit.

⁸ *Enlargement of the European Union. Guide to the negotiations. Chapter by chapter*, European Commission, DG Enlargement, June 2003.

⁹ Léonard E., Spineux A., *Les relations industrielles en Europe aujourd'hui*, Institut des Sciences du Travail, UCL, 2003 (unpublished).

the organisations, the contacts made during the data collection and the discussions with the different players concerned should be an integral part of a process of mutual recognition¹⁰. The main sources used within the framework of this study are thus the social partners themselves.

Lastly, a few words on the consultation process involving the European social partners must be added. The organisations which have been consulted are cited in annex. The comments that the IST received from these organisations, and those of their members have been incorporated in different ways, depending on the kind of information received:

- The observation is directly included in the content of the report
- When a difference of opinion exists between the employers' or workers' organisation and the expert, the observation is included as a footnote in the report, as well as the justification of the expert.

The consultation for the report on the shipbuilding industry took place during the months of November-December 2005.

Finally, given that national situations are very changeable and evolve rapidly, it is important to stress that the aim of this study is to take "a snapshot" of the situation of the organisations in 2005. Interviews with the organisations took place, and the national reports were written, between April and July 2005.

¹⁰ Reply to Call for Tenders VT/2002/83. Studies on the representativeness of the social partners at sector level in the European Union and monographs on the situation of the social partners in the candidate countries, Institut des Sciences du Travail, UCL, 2002.

THE SHIPBUILDING INDUSTRY IN THE EUROPEAN UNION

Preliminary note: This comparative study does not cover Luxembourg. Not a single enterprise is active in the shipbuilding industry in that country.

1. Delimitation and scope of activities of the sector

Basically, the shipbuilding sector may be limited to activities included in the *NACE classification – REV.1, section D, division 35, group 35.1: Building and repairing of ships and boats*.

This group is divided into two classes:

- 35.11: Building and repairing of ships;
- 35.12: Building and repairing of pleasure and sporting boats.

Code 35.11 *Building and repairing of ships* includes the following activities:

- building of commercial vessels: passenger vessels, ferry-boats, cargo ships, tankers, etc.;
- building of warships;
- building of fishing boats.

This class also includes:

- construction of drilling platforms, floating or submersible;
- construction of floating structures: floating docks, pontoons, coffer-dams, floating landing stages, buoys, floating tanks, barges, lighters, etc.;
- maintenance, repair or alteration of ships.

The following activities are excluded from this class:

- manufacture of ships' propellers, see code 28.75;
- manufacture of marine engines, see code 29.11;
- manufacture of navigational instruments, see code 33.20;
- manufacture of amphibious motor vehicles, see code 34.10;
- manufacture of inflatable boats or rafts, see code 35.12.

Code 35.12 *Building and repairing of pleasure and sporting boats* includes the following activities:

- building of inflatable;

- building of sailboats with or without auxiliary motor;
- building of motor boats;
- building of other pleasure and sporting boats: canoes, kayaks, skiffs;
- maintenance, repair or alteration of pleasure boats.

The following activities are excluded from this class:

- manufacture of marine engines, see code 29.11;
- manufacture of sailboards, see code 36.40.

At European level, the workers' organisation (EMF – European Metalworkers' Federation) engaged in the sectoral social dialogue committee dedicated to the shipbuilding industry, covers the totality of NACE 35.1. The employers' organisation (CESA – Community of European Shipyards' Association) covers NACE code 35.11 "*Building and repairing of ships*".

The delimitation of activities covered by the "shipbuilding industry" social dialogue committee does not include military shipbuilding production. Therefore, the *building of warships* has been excluded from the scope of activities covered by this study.

At national level, the range of activities statistically included in the sector is generally congruent with the NACE classification. However, it should be noted that in some countries, certain closely related activities (mainly from the supply industry, marine equipment, etc.) are sometimes considered as forming part of the sector. This is the case for Poland and Spain.

From the point of view of collective bargaining, the situation varies from one country to another. In the majority, shipbuilding constitutes part of the metalworking industry. In others, NACE 35.11 and NACE 35.12 are totally independent and under separate collective agreements.

The table below clarifies the delimitation of the shipbuilding industry in each country, from the statistical point of view and from the standpoint of collective bargaining. This information serves as a reference for the remainder of this comparative study. We have made every effort to respect as closely as possible the different national realities.

Delimitation of the shipbuilding sector from the statistical (S) and the collective bargaining (CB) point of view (by country)

Country	Delimitation of the shipbuilding industry sector	
Austria	S	Activities included in the sector correspond to NACE 35.1
	CB	The sector is integrated into the associational system of industrial relations that relates to the broader area of the metalworking industry
Belgium	S	Activities included in the sector correspond to NACE 35.1
	CB	The sector is integrated into the collective bargaining covering the steel, mechanical and electrical construction sectors and the metalworking industry sector
Cyprus	S	Activities included in the sector correspond to NACE 35.1
	CB	Shipbuilding industry workers are affiliated to the Cyprus Metalworkers, Mechanics and Electricians Trade Union (SEMMEK) or to the Cyprus Industrial Workers Federation (OVIEK). The latter covers the footwear, clothing, beverages, metal, plastics, chemicals, electrical and motor vehicle import sectors.
Czech Republic	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1
Denmark	S	Activities included in the sector correspond to NACE 35.1

	CB	From the point of view of collective bargaining, shipbuilding constitutes part of the metal trade and industry sector.
Estonia	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1
Finland	S	Activities included in the sector correspond to NACE 35.1.
	CB	Sub-sectors NACE 35.11 and NACE 35.12 are independent and mostly under separate collective agreements. Employees in the 35.11 group are mostly members of trade unions in the metal industry while employees in the 35.12 group are members of trade unions in the chemical and wood industry sectors.
France	S	Code 35.1 in the French Nomenclature of Activities divides the sector into four categories: 35.1A – Building of warships (excluded from the scope of this study); 35.1B – Civil shipbuilding; 35.1C – Repairing of ships; 35.1E – Building of pleasure boats.
	CB	The sector is not unified from the collective bargaining point of view: NAF 35.1B and 35.1C are under collective agreements for the whole metalworking industry while NAF 35.1E is under a collective agreement covering specifically this field of activity.
Germany	S	Activities included in the sector correspond to NACE 35.1
	CB	In the framework of collective bargaining, shipbuilding is included in the metalworking and electrical industries.
Greece	S	Activities included in the sector correspond to NACE 35.1
	CB	NACE 35.1 is covered by the collective agreement for the metalworking sector
Hungary	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1
Ireland	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1
Italy	S	Activities included in the sector correspond to NACE 35.1
	CB	The shipbuilding industry is covered by four industry-wide agreements for the wider metalworking sector.
Latvia	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1
Lithuania	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1
Malta	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1
Poland	S	Activities included in the sector correspond to NACE 35.1. However, actors in social dialogue sometimes consider certain closely related activities, which are mainly handled by subsidiary companies, as forming part of this sector, even though they are statistically excluded.
	CB	Activities included in the sector correspond to NACE 35.1 and certain closely related activities, which are mainly handled by subsidiary companies.
Portugal	S	Activities included in the sector correspond to NACE 35.1
	CB	In the framework of collective bargaining, shipbuilding is included in the metalworking sector
Slovak Republic	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1
Slovenia	S	Activities included in the sector correspond to NACE 35.1
	CB	A broad sectoral collective bargaining system covers NACE 27, 28, 29, 30, 31, 32, 33, 34 and 35
Spain	S	Activities included in the sector correspond to NACE 35.1. However, due to extensive outsourcing, it becomes extremely difficult to define the industry precisely since supply companies whose activity is not limited exclusively to shipbuilding are sometimes included in the industrial sector, and other times not. Consequently, some statistical data also includes activities of the supply companies not limited exclusively to shipbuilding (marine equipment).
	CB	The sector is covered by collective agreements for the engineering and metalworking sector.

Sweden	S	Activities included in the sector correspond to NACE 35.1
	CB	Shipbuilding is covered by agreements concluded in three different branches: engineering industries, steel and iron industries, and wood products industries.
The Netherlands	S	According to the Dutch Central Statistics Office, the shipbuilding industry is classified as follows: SBI 3511: building and repairing of ships, dredging materials, drilling platforms, and related activities; SBI 3512: building and repairing of pleasure and sporting boats.
	CB	The sector is not unified and is covered by various sectoral collective agreements. Most activities of NACE 35.11 are under umbrella agreements for the metalworking and electrical engineering sector. Other activities of NACE 35.11 as well as a large part of NACE 35.12 (building and repairing pleasure and sporting boats with a metal hull) are under the umbrella agreement for the metalworking and technology-based branches. Lastly, activities of building and repairing pleasure and sporting boats with a wooden or synthetic hull (part of NACE 35.12) are covered by a specific branch agreement.
United Kingdom	S	Activities included in the sector correspond to NACE 35.1
	CB	Activities included in the sector correspond to NACE 35.1

Source: national reports

As mentioned above, the activity of building warships has been excluded from the scope of this study. However, in some countries, it is not possible to isolate the civilian shipbuilding industry from military activities as companies in the sector undertake orders both for commercial ships and warships (this is the case in Germany, Greece, Italy, Spain, the Netherlands and the United Kingdom). In those countries, socio-economic data cover both the civilian and military shipbuilding industry.

2. Socio-economic features of the sector

The European shipbuilding industry has been faced with intense difficulties for a number of years. It has had to cope with a serious imbalance between supply and demand as well as exacerbated competition from the Southeast Asian countries (especially China, South Korea and Japan). Between 2000 and 2003, the European industry saw its orders decline by 70%¹¹. In this context, a number of companies have gone out of business and in some countries the sector has almost completely disappeared. Most of the other countries have adapted their production, focusing on ships with high added value (more sophisticated products based to a higher level on the knowledge–high tech niches). This trend, coupled with innovation in production methods and active outsourcing strategies, has had the effect of cutting employment in the sector by nearly 70% since 1975¹².

This section presents the socio-economic features of the shipbuilding industry for each country. As seen from the table below, in the majority of the countries, the shipbuilding industry is a small sector within the national economy. Even if the share of the sector in total employment seldom exceeds 1%, its economical situation nevertheless varies from one country to the next. In Austria, Cyprus, Hungary, Ireland and the Slovak Republic, the importance of the sector in the national economy is almost negligible and its share in the national GDP does not exceed 0.03%. In other cases (Belgium, the Czech Republic, Malta and Slovenia), the shipbuilding industry is also considered a small activity with employment of fewer than 2,000 salaried workers. By contrast, in France, Germany, Italy, Poland, Spain, the Netherlands and the United Kingdom, the building and repairing of ships and boats employs more than 10,000 salaried workers.

¹¹ Report 2003 from the European Commission to the Council on the Situation in World Shipbuilding, COM(2003)232

¹² AWES annual report – 2002

Economic and employment weight of the shipbuilding sector by country

	Economic weight (share in the national GDP)	Employment weight	Number of companies a) NACE 35.11 b) NACE 35.12	Number of salaried workers a) NACE 35.11 b) NACE 35.12	Commentary
Austria	0.0017%	0.01%	a+b) 28	a+b) 305	The sector is dominated by a few very small companies (79% have fewer than 10 employees) and by one shipbuilding company with 98 employees. All in all, the presence of the sector in the country's economy is almost negligible.
Belgium	ND	0.06%	a) 66 b) 22	a) 1,123 b) 201	Following the closure of the main shipyards, the shipbuilding industry has become a very marginal activity. Today, for the most part, the sector boasts only small companies specialising in maintenance and ship repair, and there is only one shipyard facility for the repair of sea-going vessels.
Cyprus	0.0004%	0.04%	a) 8 b) 22	a) 55 b) 42	The shipbuilding industry is one of the smallest sectors of the Cypriot economy and it is characterised by small enterprises (50% do not employ salaried workers – the remainder employ fewer than 100 salaried workers)
Czech Republic	ND	Under 0.1%	a+b) 272	a+b) 552	Production has declined sharply since the early 1990s. Today, shipbuilding is a small industry and 70.22% of enterprises do not employ any salaried workers.
Denmark	0.34%	0.2%	a+b) 384	a+b) 4,722	The sector is dominated by small enterprises (65% do not employ any salaried workers) and by one large shipyard employing around 50% of salaried workers in the sector. NACE 35.12 sub-sector is relatively strong in Denmark.
Estonia	ND	0.4%	a) 57 b) 18	a+b) 2,281	The shipbuilding industry is a small sector in the Estonian economy. Only two enterprises employ more than 250 salaried workers.
Finland	0.1%	0.3%	a) 4 b) 180	a) 4,823 b) 2,100	NACE 35.11 sub-sector is dominated by four companies which together own six large shipyards. 90% of companies in NACE 35.12 sub-sector employ fewer than 10 salaried workers.
France	ND	0.75%	a) 56 b) 61	a) 8,322 b) 8,202	Both sub-sectors NACE 35.11 and NACE 35.12 employ more than 8,000 salaried workers. Turnover of the civilian shipbuilding sub-sector amounts to € 1,500 million and € 150 million for ship repairing.
Germany*	ND	0.09%	a) 79 b) 23	a) 22,359 b) 2,977	Although the German shipbuilding sector has dramatically declined since 1985, it earned € 4.5 Billion in sales in 2004. The majority of companies in the sector employed between 20 and 99 workers in 2002. The same year, 54.4% of employees worked for the eight largest shipyards (more than 1,000 employees).
Greece*	ND	ND	a+b) 996	a+b) About 8,000	Since 1986, the sector has entered a period of continuous and rapid decline reflected in the closing down of many yards. The sector is highly polarized between the three large shipyards on the one hand (employing around 40% of salaried workers in the sector), and the plethora of micro-firms located in the Perama Zone on the other.
Hungary	<i>This share is inexpressible (infinitesimal percentage)</i>	<i>This share is inexpressible (infinitesimal percentage)</i>	a) 2 b) 8	a) 135 b) 145	The shipbuilding sector is currently of negligible importance in the Hungarian economy. Only two companies build and repair ships for inland waters, and about eight smaller companies produce sailing boats, mainly made of plastic.
Ireland	0.03%	0.02%	a) 17 b) 8	a) 391 b) 58	Although the shipbuilding industry has been an important field of activities in Ireland for centuries, at present it is a small industry of 25 units. None of these companies build large sea vessels.
Italy*	ND	0.19%	a) 1,112 b) 1,925	a) 18,832 b) 7,657	The sector is characterized by the presence of a large State-owned company, Fincantieri, which accounts for about one third of total employment in the sector, and by a high polarisation between Fincantieri and a few other large or

					medium-sized private companies, on the one hand; and a multitude of SMEs, mainly contractors or companies carrying out activities of building of pleasure and sporting boats, on the other.
Latvia	ND	0.3% (estimate)	a+b) 45	a+b) 3,000 (estimate)	The sector is dominated by repair services and only two shipbuilding companies employ more than 100 salaried workers. Overall data on sales of shipbuilding and ship repair services show that the sector is currently expanding.
Lithuania	0.5% (estimate)	0.4% (estimate)	ND	a+b) 5,500 (estimate)	Lithuania's shipbuilding industry has been growing in recent years. Most employees work in the three largest enterprises (those with a workforce of over 1,000).
Malta	8%	1.39%	a) 3 b) 12	a) 1,846 b) 60	The sector consists of one large state-owned ship repair yard (<i>Malta Shipyards Limited</i> , employing 1,776 salaried workers), 2 small private repair yards and 12 micro-companies operating in NACE 35.12. For a long time, <i>Malta Shipyards Limited</i> was one of the main motors of the Maltese economy. However, since 1982 it has been operating at a loss and has had to rely on heavy state subsidies.
Poland	0.4% (estimate)	0.4%	a) 1,475 b) 235	a) 32,740 b) 2,422	In 2002, the sector underwent a major crisis in profitability. In this context, the country's main shipbuilding yards, which were privatised during the 1990s, have been wholly or partly taken over by the state. The sector has also seen the emergence of smaller private companies that specialise in building smaller vessels.
Portugal	ND	Around 0.2%	a+b) 165	a+b) 4,729	Portuguese shipyards have undergone a decline in recent years and have lost market share. Today, the sector is dominated by two large enterprises which together employ 42.9% of the sectors' workers. The remaining enterprises are SMEs.
Slovak Republic	ND	ND	a+b) 1	a+b) 1,298	Although it is a landlocked country, the Slovak Republic has always had a prosperous shipbuilding company, <i>Slovenske lodenice Komarno</i> . However, this company experienced a grave crisis in the 1990s and is struggling to survive today. It no longer plays an important role in the national economy.
Slovenia	ND	ND	a) 16 b) 24	a) 136 b) 415	The Slovenian shipbuilding industry is a small sector of activities. All companies in NACE 35.11 have fewer than 10 salaried workers. In NACE 35.12, one enterprise is characterised as large (with approximately 260 employees). Sub-sector 35.12 mainly consists of boat maintenance and repair.
Spain*	ND	0.2% (estimate)	a+b) 2,214	a+b) 25,000 (estimate)	Shipbuilding has been the target of ongoing and important restructuring for the last 20 years. These plans have involved significant reductions in the workforce. 43% of companies in the sector do not employ any salaried workers.
Sweden	0.4%	0.094%	a) 247 b) 987	a) 1,247 b) 2,352	Shipbuilding declined rapidly starting in the mid-1970s. Today, the sector has only 3,600 workers, compared to 28,000 in 1975. The sector's activities include the building of freight ships and oil platforms, and the building and repairing of pleasure and sporting boats. 67.1% of companies do not employ salaried workers.
The Netherlands*	ND	0.33%	a) 570 b) 1,025	a+b) Around 25,000	The Dutch shipbuilding industry is specialized in the production of technological high-quality ships and it has a powerful position in various niche markets. 52% of companies do not employ salaried workers.
United Kingdom*	0.1% of total turnover	0.15%	a+b) 1,463	a+b) 32,000	Between 1995 and 2003, total output for the sector declined by 4% (in constant prices). However this general picture masks a shift in production with a sharp output decline in the shipbuilding and repairing sub-sector (35.11), and growth in the pleasure and sporting boats sub-sector (35.12).

Source: national reports

* Data include the building of warships

ND: No data

The economic structure of the sector differs from one country to another. In Austria, Belgium and Cyprus, all enterprises active in the sector are SMEs (employing fewer than 200 salaried workers). The majority of the remaining countries are characterized by a polarization between a plethora of small (or small and medium-sized) firms on the one hand, and a few large companies generally employing the majority of workers in the sector on the other (the case of the Czech Republic, Denmark, Estonia, Finland, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Malta, Poland, Portugal, Spain, Sweden and the Netherlands). A good example of this situation is the case of Greece, where the sector is divided between a huge number of micro-firms (employing fewer than 10 salaried workers and making up 95% of enterprises in the sector) and three large shipyards employing 40% of workers in the sector. In some countries, this polarization matches the sub-division of the shipbuilding industry sector (NACE 35.11– Building and repairing of ships; NACE 35.12 – Building and repairing of pleasure and sporting boats). For example, in Finland, 87% of enterprises employ fewer than 10 salaried workers, these being mainly active in NACE 35.12, while four large shipyards active in NACE 35.11 employ 61% of salaried workers in the sector (we also observe this situation in Hungary, Italy and Malta).

Lastly, it should be noted that the number of companies without salaried workers is high in some countries: Cyprus (50%), the Czech Republic (70%), Denmark (65%), Greece, Italy (40%), Spain (43%), Sweden (67%) and the Netherlands (52%).

As regards employment characteristics, the workforce in the sector is mainly male and skilled. The majority of workers are blue-collar.

3. Description of the organisations actives in the sector

1. European level

Workers' organisation: The European Metalworkers' Federation (EMF)

The European Metalworkers' Federation (EMF) was founded in 1971 and brings together the national professional associations representing metalworkers in the majority of the Member States of the European Union as well as from Norway and Switzerland and the candidate countries. All in all, EMF organises 6.5 million workers in 30 countries and 65 national metalworkers' unions.

The core tasks of this organisation are the following¹³:

- *To defend the trade union, social and political interests of the European metalworkers' unions vis-à-vis the EU institutions (Parliament, the Council and the Commission) and the European employers' organisations in the metal industry;*
- *To coordinate and implement the initiatives and actions of the European metalworkers' unions at European level;*
- *To serve its member organisations where European interests are involved;*
- *To collaborate with the other federations affiliated to the European Trade Union Confederation (ETUC);*
- *To represent the European interests of the metalworkers' unions at international level.*

¹³ <http://www.emf-fem.org>

EMF has a mandate to engage in bargaining at European level, and since 2003 this organisation has participated in the sectoral social dialogue committee for the shipbuilding industry. In this framework, it focuses on the following areas: Industrial development, restructuring, competitiveness and employment; working conditions and industrial relations; globalisation and its impact on the economic and social situation; the EU's eastern enlargement and its economic and social consequences; the international division of labour and trade; training; research, technology and development; code of conduct; sustainable industrial development of the sector; work organisation and employment, the image and attractiveness of industrial work of the shipbuilding sector¹⁴.

Employers' organisation: The Community of European Shipyards' Associations (CESA)

The Community of European Shipyards' Associations (CESA) was formally established on 28 May 2004 as a result of the merger between the Association of European Shipbuilders and Shiprepairers (AWES) and the Community of EU shipbuilders Associations (CESA). This federation represents the shipbuilding and ship repairing industry in 14 European countries.

The purposes¹⁵ of CESA are the following:

- *To promote the interests of the European shipbuilding and shiprepair industry;*
- *To enhance cooperation of shipyards and other member companies of the National Associations of Shipbuilders and Shiprepairers in Europe;*
- *To study any matters CESA may consider to be of interest to the Industry; to promote and/or participate in any studies, reports, etc., to seek and propose solutions, and, in general, to undertake any activity in order to maintain, develop and promote shipbuilding and shiprepair in Europe;*
- *To represent on a common basis the interests of the European shipbuilding and shiprepair industry before the governing and advisory bodies of the European Union and other international entities;*
- *To promote its policies and initiatives regarding shipbuilding, shiprepair and marine industries;*
- *To promote and facilitate research, development and innovation in the shipbuilding and shiprepair industries, including the promotion of relevant projects and the dissemination of results among its members;*
- *To promote safe and environmentally friendly shipping, including an active contribution to the work of the International Maritime Organisation (IMO).*

The different working groups and committees within the CESA focus on the following areas: R&D in the field of the shipbuilding and shiprepair industry, and equipment manufacturers; monitoring of market developments; market forecast; international trade policy relating to shipbuilding; social dialogue; ship maintenance, repair and conversion group; naval yards; safety and environment.

Since September 2003, CESA has been engaged in social dialogue with EMF in the framework of a European sectoral social dialogue committee for the shipbuilding industry.

¹⁴ EMF Work programme 2003-2007

¹⁵ <http://www.cesa-shipbuilding.org>

2. National level

Workers' organisations

At national level, the situation relative to the organisations active in the sector is rather heterogeneous.

The main objective of this part is to present for each country the different organisations active in the shipbuilding industry, their membership (total membership and number of members active in the shipbuilding industry), the density (number of salaried workers affiliated to the organisation / number of salaried workers in the sector), the recognition system, their role in sectoral collective bargaining and lastly, their European affiliations.

Workers' organisations active in the shipbuilding sector by country

Country	Organisation	Total members - Members in the sector	Density	Recognition	Role in national collective bargaining at sectoral level	European affiliations
Austria	GPA (The Union of the White-Collar Workers of the Private Sector)	287,558 - ND	ND	GPA and GMT are member unions of the national federation ÖGB which has legally granted recognition as a bargaining party. Only the ÖGB (in contrast with its member unions) has the legal right to conclude collective agreements.	GPA autonomously negotiates sectoral collective agreements but it signs in the name of the ÖGB	UNI-Europa
	GMT (The Union of the Blue-collar Workers of the Metal Industry, Mining, the Power Industry and the Textiles Industry)	216,799 - ND	ND		GMT autonomously negotiates sectoral collective agreements but signs in the name of the ÖGB	EMF; EMCEF
Belgium	CSC-Métal/ACV-Metal (The Metal section of the CSC)	220,000 - ND	ND	These organisations are legally recognised as representative.	It negotiates and signs sectoral collective agreements	EMF
	CNE (General Federation of White-Collar Workers)	120,000 - ND	ND		It negotiates and signs sectoral collective agreements	EMF
	LBC-NVK (General Federation of White-Collar Workers-National Managers' Union)	294,000 - ND	ND		It negotiates and signs sectoral collective agreements	EMF
	CMB (Metalworkers' Union)	178,000 - ND	ND		It negotiates and signs sectoral collective agreements	EMF
	SETCa/ BBTK (Belgian Union of White-Collar Staff, Technicians and Managers)	324,294 - ND	ND		It negotiates and signs sectoral collective agreements	EMF

	CGSLB/ACLVB (Federation of Liberal Trade Unions of Belgium)	220,000 - ND	ND		It negotiates and signs sectoral collective agreements	EMF; ETUC
Cyprus	SEMMEK (Cyprus Metalworkers, Mechanics and Electricians Trade Union)	3,180 - 60	62%	Organizations recognize one another, and are recognized by the state as representative of workers at national, industry and enterprise levels, as the case may be.	In the shipbuilding industry, SEMMEK negotiates and signs collective agreements at the enterprise level.	UNI-Europa
	OVIEK (Cyprus Industrial Workers Federation)	12,000 - 35	36%		In the shipbuilding industry, OVIEK negotiates and signs collective agreements at the enterprise level.	EMF; UNI-Europa; EFFAT; ETUFTCLF; EMCEF
Czech Republic	There are only two enterprise-level trade union organisations operating side-by-side in the two main shipyards. One is a union member of the Czech Metalworkers' Federation (Odborový svaz KOVO), the largest trade union in the Czech Republic; the other is a member of the Transport Workers' Union (OSD). Odborový svaz KOVO is a member of EMF.					
Denmark	"CO-Industri" Cartel (Central Organisation of Industrial Employees)	306,794 - ND	ND	Mutual recognition (this recognition system is laid down by collective agreements).	It negotiates and signs sectoral collective agreements	EMF
	Danish Metalworkers Union (Dansk Metal)	140,618 - Approx. 3,000	63.5% (estimate)		It negotiates and signs sectoral collective agreements	ETF; EMF (indirectly through CO-Industri)
	Malerforbundet I Danmark (National Painters Union in Denmark)	14,000 - 358	7.6%		It negotiates and signs sectoral collective agreements	EMF (indirectly through CO-Industri)
	3F (United Federation of Danish Workers)	363,729 - ND	ND		It negotiates and signs sectoral collective agreements	EFBWW ; UNI-Europa ; EMF (indirectly through CO-Industri)
	TL (Danish Association of Professional Technicians)	30,650 - ND	ND		It negotiates and signs sectoral collective agreements	UNI- Europa; EMF(indirectly through CO-Industri)
	HK-Private (Union of Commercial and Clerical Employees in Denmark)	370,420 - ND	ND		It negotiates and signs sectoral collective agreements	UNI-Europa ; ETF ; EMF (indirectly through CO-Industri)
	DEF (Danish Union of Electricians)	30,107 - ND	ND		It negotiates and signs sectoral collective agreements	UNI-Europa; EMF (indirectly through CO-Industri)
	TIB (Danish Union of Wood, Industrial and Building Workers)	68,000 - Approx. 300 (TIB estimate)	6.4% (estimate)		It negotiates and signs sectoral collective agreements	EFBWW; EMF (indirectly through CO-Industri)

	IDA (Danish Society of Engineers)	61,000 - more than 300 (IDA estimate)	7% (estimate)		IDA does not take part in sectoral collective bargaining for the sector	EMF; FEANI
	MMF (Danish engineers' Association)	8,711 - Approx. 13	0.2 %		It negotiates and signs sectoral collective agreements	FICT; FECER
Estonia	There is only one enterprise-level trade union organisation operating in the sector (Loksa Shipyard's trade union). This union covers 14.2% of salaried workers in the sector and is a member of the national sectoral organisation: the Federation of Water Transport Workers' Trade Unions (EVAF). EVAF is not a member of any European or international organisation.					
Finland	Metalli (Metalworkers' Union)	167,400 - ND	95-98% of NACE 35.11	There is no formal recognition system on the part of the social partners. The recognition system is based mainly on mutual recognition.	It signs sectoral collective agreements for the metalworkers (including NACE 35.11 workers)	EMF
	Kemiantiliitto (Chemical Workers' Union)	49,000 - ND	ND		It signs sectoral collective agreements for the chemical industry (including NACE 35.12 workers)	No
	PUULIITTO (Wood and Allied Workers' Union)	50,000 - 812	53% of boats builders		It signs sectoral collective agreement applying exclusively to the builders of boats	NFBWW EFBWW
	TU (Union of Salaried Employees)	130,000 - ND	ND		It signs collective agreements for white-collar workers through various sectors (including NACE 35.1)	EMF; EMCEF; NIF
	AKAVA (Confederation of Unions for Academic Professionals in Finland) – IL ry is one of its member (for more details, see the national report)	436,000 - ND	ND		It signs collective agreements for high level education, experts and managerial staff through various sectors (including NACE 35.1)	ETUC; Eurocadres; EMF (IL ry)
	Sähköalojen ammattiliitto (Trade Union for Electrical Branch employees)	32,000 - ND	ND		It signs collective agreements for electrical workers through various sectors (including NACE 35.1)	No
France	FTM-CGT (Metalworkers' Federation of the General Confederation of Labour)	ND - 1,800	21.6%	These organisations are legally recognised as representative in NACE 35.11	It signs sectoral collective agreements for the metalworking sector (including NACE 35.11 workers)	EMF
	FO-Métaux (Workers' Force Metallurgy Confederated Federation)	ND - ND	ND		It signs sectoral collective agreements for the metalworking sector (including NACE 35.11 workers)	EMF
	FGMM-CFDT (Mines and Metallurgy General Federation of the French Democratic Confederation of Labour)	ND - ND	ND		It signs sectoral collective agreements for the metalworking sector (including NACE 35.11 workers)	EMF

	Fédération de la métallurgie de la CFE-CGC (French Confederation of Professional and Managerial Staff)	ND - ND	ND		It signs sectoral collective agreements for the metalworking sector (including NACE 35.11 workers)	No	
	FGM-CFTC (Metallurgy General Federation of the French Christian Workers' Confederation)	ND - ND	ND		It signs sectoral collective agreements for the metalworking sector (including NACE 35.11 workers)	EMF	
	Fédération nationale des industries chimiques de la CGT (CGT National Federation of the Chemical Industries)	ND - ND	ND	These organisations are legally recognised as representative in NACE 35.12	It signs sectoral collective agreements for NACE 35.12 exclusively	ND	
	Fédération Bâtiment/Bois de la CGT-FO (CGT-FO Building/Wood Federation)	ND - ND	ND		It signs sectoral collective agreements for NACE 35.12 exclusively	ND	
	Fédération Chimie et Energie de la CFDT (CFDT Chemical and Energy Federation)	ND - ND	ND		It signs sectoral collective agreements for NACE 35.12 exclusively	ND	
	Fédération de la métallurgie de la CGC (CGC Metallurgy Federation)	ND - ND	ND		It signs sectoral collective agreements for NACE 35.12 exclusively	ND	
	Fédération Bâtiment/Bois de la CFTC (CFTC Building/Wood Federation)	ND - ND	ND		It signs sectoral collective agreements for NACE 35.12 exclusively	ND	
Germany	IG Metall (Trade Union in manufacturing and services of the metal, electrical, textile, garment, wood and plastics industries)	2,426,094 - 12,053	40-50%		Mutual recognition system	IG Metall negotiates and signs sectoral collective agreements for metal and electrical industries	EMF; EFBWW
Greece	POEM (Panhellenic Metalworkers' Federation)	35,000 - 6,000	75% (estimate)		ND	It negotiates and signs sectoral collective agreements at national level	EMF

	Syndikato Ergatoyvallion Metallou Peiraia, Attikis & Nisson (Piraeus Metalworkers' Union)	9,500 - ND	ND		It negotiates and signs sectoral collective agreements at local level	No
	Panellinia Enossi Amovoliston, Kathariston, Bafeon (Panhellenic Association of Sandblasters, Cleaners, Painters, and similar occupations)	2,738 - ND	ND		It negotiates and signs sectoral collective agreements at local level	No
	Somateio Katergassias Xylou & Nafpigoxylourgikon Ergassion Peiraios & Perihoron (Association of Wood-processing and Vessel Woodwork of the Piraeus region)	800-800	100% of the sub-sector's employees in the Region		It negotiates and signs sectoral collective agreements at local level	No
	Sonateio Ilektrologon Episkevon Egatastaseon Ploion Attikis & Nisson (Union of Electricians in Ship-repairing of Attica)	380 - ND	ND		It negotiates and signs sectoral collective agreements at local level	No
Hungary	There is only one enterprise-level trade union organisation operating in the sector (Balaton Shipping Company Trade Union). This union covers 10.7% of workers in the sector.					
Ireland	No trade union represents the workers in the Irish shipbuilding industry.					
Italy	FIOM (Federation of White- and Blue-collar Metalworkers)	about 364,000 - ND	ND	The Italian recognition system is highly informal and uncertain as a contrast between constitutional principles and actual practice is observed. Indeed, the Constitution states that only "registered" trade unions are allowed to sign collective agreements, but in practice, <i>mutual recognition</i> is the only principle followed for the negotiation of national collective agreements.	Signatory of sectoral collective agreement for metalworking industry	EMF
	FIM (Italian Federation of Metalworkers)	190,118 - ND	ND		Signatory of sectoral collective agreement for metalworking industry	EMF
	UILM (Union of Italian Metalworkers)	91,110 - ND	ND		Signatory of sectoral collective agreement for metalworking industry	EMF
	UGL Metalmeccanici (Federation of Italian Metalworkers)	ND - ND	Less than 1% (estimate)		Signatory of sectoral collective agreement for metalworking industry	No
	FAILM (Italian Autonomous Federation of Metalworkers)	ND - ND	Less than 1% (estimate)		It does not take part in sectoral collective bargaining	CESI

	Federmanager (National Federation of Industrial Company Managers)	about 80,000 - about 40	about 0.1%		It signs intersectoral agreements for industrial managers	No
Latvia	ŪTAF (Water Transport Trade Union Federation)	2,500 - 93	3%	The social partners have no formal or reciprocal recognition systems	It signs two enterprise-level collective agreements	ETF
	Latvijas Kuģu Remonta Arodbiedrība (Latvian Ship Repair Trade Union)	354 - 354	12%		It signs two enterprise-level collective agreements	No
Lithuania	There is no sector-level union federation for the shipbuilding sector					
Malta	GWU (General Workers' Union)	48,000 - 1,808	94.8%	ND	It negotiates and signs enterprise-level collective agreements for the shipbuilding industry	EMF; ETUC
Poland	Maritime Industry Workers' National Section of the Independent Self-Governing Trade Union "Solidarnosc" (Sekcja Krajowa Przemysłu Okretowego NSZZ "Solidarnosc")	7,611 - 7,611	21.6%	These organisations are officially recognised by the employers as representative partners	This organisation has the power to sign bipartite sectional collective agreements	EMF through the Office of the Metal workers
	WZZPGM (Free Trade Union of Maritime Industry's Workers)	9,000 - 5,500	15.6%		This organisation has the power to sign bipartite sectional collective agreements	No
Portugal	FEQUIMETAL (Inter-union Federation of Metallurgy, Mines, Chemicals, Pharmaceutical, Petrol and Gas Industry)	82,000 - 2,540	45.5%-53.7% (depending on the source)	Organisations that take part in collective bargaining in the sector are automatically recognised as representative.	It negotiates and signs sectoral collective agreements for the entire metalworking sector	EMF
	SINDEL (National Industry and Energy Trade Union)	ND - 120	2.1%-2.5%		It negotiates and signs sectoral collective agreement for the entire metalworking sector	EMCEF; EPSU
	SIMA (Trade Union of Metallurgical and Similar Industries)	65,000 - 1,000	17.9%-21.1% (depending on the source)		It negotiates and signs sectoral collective agreement for the entire metalworking sector	EMF
Slovak Republic	Slovenske lodenice Komarno trade union: this trade union is active in the company <i>Slovenske lodenice Komarno</i> (there is only one enterprise active in the sector in the country). It covers 46.2% of workers in the enterprise. Once a year, the trade union concludes an enterprise collective agreement with the employer. The Slovenske lodenice Komarno trade union is a member of KOVO (the Slovak Metalworkers' Union), which is a member of EMF.					
Slovenia	There are no trade unions in Slovenia that deal with workers in the shipbuilding industry.					
Spain	FM-CCOO (Metal and Steelworks Federation of Workers' Commissions)	185,000 - 5,500	22%	Spanish legislation recognises the right to take part in collective bargaining for trade unions according to their results in social elections at	It negotiates and signs sectoral collective agreement at provincial or autonomous community level	EMF

	MCA-UGT (National Federation of Metal and Construction Workers and Allied Trades of the General Workers Union)	169,500 - 3,400	14%	company level.	It negotiates and signs sectoral collective agreement at provincial or autonomous community level	EMF
	CIG-METAL (Metalworkers' Federation of the Galician Trade Union Confederation)	8,539 - 879	3.5% in Spain; 12% in Galicia		It negotiates and signs sectoral collective agreement at provincial or autonomous community level	No
	ELA-METALA (Federation of Metalworking Industries and Allied Trades of Basque Workers' Solidarity)	ND - ND	ND		It negotiates and signs sectoral collective agreement at provincial or autonomous community level	EMF
	CAT (Autonomous Collective of Workers)	1,600 - 1,000	4%		It negotiates and signs enterprise-level collective agreements	No
Sweden	Metall (The Metall Workers' Union)	284,405 - 568	15.8%	ND	It negotiates and signs sectoral collective agreements for blue-collar workers	EMF; EMCEF; NM; NIF
	Skogs-och Träfacket (The Forest and Wood Workers' Union)	45,741 - 513	14.3%		It negotiates and signs sectoral collective agreements for blue-collar workers	EFBWW; NBTF
	CF (The Swedish Association of Graduate Engineers)	75,900 - 158	4.4%		It negotiates and signs sectoral collective agreements for blue-collar workers	EMF; EMCEF; NM; NIF
	SIF (The Union of White-Collar workers in Industry)	301,086 - 626	17.4%		It negotiates and signs sectoral collective agreements for white-collar workers	EMF; EMCEF; NM; NIF; EFBWW; NBTF
	LEDARNA (Association of Management and Professional Staff)	65,000 - 155	4.3%		It negotiates and signs sectoral collective agreements for white-collar workers	CEC
The Netherlands	FNV Bondgenoten, Sector Metaal (FNV Allied Section, Metal Sector)	ND - 5,000-5,500 (estimate)	20-25%	Mutual recognition	It negotiates and signs sectoral collective agreements	EMF

	FNV Bondgenoten, Sector Bouw (FNV Allied Section, Construction Industry sector)	ND - ND	ND		It negotiates and signs sectoral collective agreements	EFBWW
	CNV Bedrijvenbond Vakgroep Metaal en Electro (CNV industrial, food production and transport sectors, Metal and Electrical section)	ND - 2,900 in all; 1,350 (without unemployed and pensioners)	5.5%		It negotiates and signs sectoral collective agreements	EMF
	CNV Hout- en Bouwbond (CNV wood and construction industry)	ND - ND	ND		It negotiates and signs sectoral collective agreements	EFBWW
	De Unie (The Union)	ND - 500	2%		It negotiates and signs sectoral collective agreements	EMF
	VHP Metalectro (Association for Higher personnel in the metalworking and electrical engineering sector)	ND - ND	ND		It negotiates and signs sectoral collective agreements	EMF
United Kingdom	Amicus	1,200,000 - 6,000 (<i>estimate</i>)	ND	ND	They belong to the bargaining cartel "CSEU" (Confederation of Shipbuilding and Engineering Unions) which is the negotiating body for collective bargaining on pay and employment conditions at enterprise level. Moreover, these organisations take part in tripartite consultation (negotiation) in the sector.	ETUC; EMF
	GMB	600,000 - 22,000 (<i>estimate</i>)	ND			ETUC; EMF
	TGWU	835,000 - ND	ND			ETUC; EMF

Source: National reports

ND: No data

As can be seen from the table, the European Metalworkers' Federation (EMF) has members in 18 of the 24 countries taken into account in this comparative study. In many cases, EMF represents several trade unions in the same country. EMF has no affiliated members covering the shipbuilding industry in Estonia, Hungary, Ireland, Latvia, Lithuania or Slovenia. However, it should be noted that five of these countries present particular industrial relations systems for the shipbuilding industry:

- In Ireland and Slovenia, no national trade union organization represents shipbuilding industry workers. This situation may be explained by the small number of workers in the sector (551 in Slovenia; 449 in Ireland). In Ireland, the huge prevalence of small companies also hinders the presence of trade unions.
- In Estonia, Hungary and Lithuania, the sector is characterized by the prevalence of enterprise-level trade union organizations. In Estonia and Hungary, only one enterprise-level trade union represents shipbuilding industry workers; these organizations cover less than 15% of salaried workers in the sector in both cases (14.2% in Estonia, 10.7% in Hungary). They

are affiliated to higher-level national organizations but none of these sectoral organizations are EMF members. There are no data as regards the enterprise-level trade unions active in Lithuania.

Generally speaking, the member organisations of EMF include the main or some of the main trade unions in the sector. All these organisations take part in collective bargaining covering shipbuilding industry workers, except in Denmark where IDA only provides legal support and guidance during individual negotiations for its members. In the Czech Republic, Malta, the Slovak Republic and the United Kingdom, this participation takes place at enterprise level since there are no collective negotiations at sector level (indirectly through their members' organisations in the Czech Republic and in the Slovak Republic).

It is also worth noting that, in many cases, the other organisations that are not members of EMF often represent a smaller sub-sector or a larger sector (wood construction, chemical workers, electrical workers), a particular territory (local, provincial trade unions) or a specific category of employees (Management and Professional staff).

Employers' organisations

Employers' organizations active in the shipbuilding industry by country

Country	Organisation	Company members — Density companies	Salaried workers — Density salaried workers	Recognition	Role in national collective bargaining at sectoral level	European affiliations
Austria	FMS (The Federal Organization of the Machinery Industries)	28 (in NACE 35.1); 595 in total – 100%	305 (in NACE 35.1); 64,782 in all – 100%	FMS is part of the Austrian Chamber of the Economy (WKÖ): each Federal Organization of the WKÖ can directly conclude collective agreements.	FMS is a member of the bargaining cartel which negotiates and concludes collective agreements on behalf of employers of the metal-working industry.	CECIMO; CECOF; CEMA; ELA; EUCETSA; EUMABOIS; EUROPUMP; FEBMA; WEM; ACEA; ACEM; CLCCR; COLIBI; EUROFEU
Belgium	Agoria	15 (directly or indirectly linked to NACE 35.1); 1,300 in all – ND	ND – ND	This organisation is legally recognised as representative.	It negotiates and signs sectoral collective agreements.	WEM ; ORGALIME ; Eurométaux ; EuPC; EICTA; Others

Cyprus	No employers' organisation exclusively represents the shipbuilding industry sector. However, some companies are members of the Federation of Employers and Industrialists (OEV). OEV does not participate in collective bargaining in the shipbuilding sector but it provides its members with advice and information to enable them to negotiate and conclude enterprise collective agreements with trade unions.					
Czech Republic	No employers' organisation in the Czech Republic covers shipbuilding industry companies.					
Denmark	DI (Confederation of Danish Industries)	92 – 24%	4,050 – 85.8%	Mutual recognition – This recognition system is laid down by collective agreements.	It negotiates and signs sectoral collective agreements	UNICE
	Danske Maritime (Danish Maritime)	9 (in NACE 35.11) – all the largest shipyards	3,150 (in NACE 35.11) – 66.7% (in NACE 35.1)		It does not take part in sectoral collective bargaining for the sector	CESA
	Skibs- og Bådebyggeriernes Arbejdsgiverforening (Employer's Association of Ship and Boat Building)	75 – 19.5%	Approx. 900 – 19%		It does not take part in sectoral collective bargaining for the sector	No
	DS (Association of Danish Master Smiths in Craft and Industry)	Minimum 40 – ND	ND – ND		It negotiates and signs sectoral collective agreements	No
	Foreningen for Skibs- og Bådebyggere i Danmark (Association for Ship and Boat Building in Denmark)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreements	No
Estonia	No employers' organisation exclusively represents the shipbuilding industry sector. However the two main shipyards in the country are both members of the Estonian Employers' Confederation (ETTK) and together with another enterprise are members of the Federation of Estonian Engineering Industry (EML). At present, these organisations do not participate in collective bargaining in the shipbuilding sector and are not members of the European employers' organisation, CESA.					
Finland	Teknoliigatollisuus ry (Technology Industries of Finland)	6 – 100% of NACE 35.11	5,500 – 100% of NACE 35.11	There is no formal recognition system for the social partners. The recognition system is based mainly on mutual recognition.	It negotiates and signs sectoral CA for the entire metalworking sector	ORGALIME; CEEMET
	AFMI (Association of Finnish Marine Industries)	46 in all; 6 in NACE 35.11 – 100% of NACE 35.11	15,000 in all; 5,500 in NACE 35.11 – 100% of NACE 35.11		It does not take part in collective bargaining	CESA; EMEC
	Finnboat (Finnish Marine Industries Federation)	170 – 90% of NACE 35.12	2,100 – 99% of NACE 35.12		It does not take part in collective bargaining	ICOMIA
	Venealan työnantajat ry (Employers of the Boating Industries)	16 – 9% of NACE 35.12	800 – 38% of NACE 35.12		It negotiates sectoral collective agreement for NACE 35.12 workers exclusively but it does not sign the agreement	No
France	CSCN (Shipbuilders' Employers Federation)	6 – 21.4%	3,860 – 59.38%	There is no recognition system provided by law for employers' organisations.	It does not take part in collective bargaining	CESA

	UIMM (Union of Metallurgy Industries and Trades)	ND – ND	ND – ND		It negotiates sectoral collective agreement (at national and territorial level) for the entire metalworking industry	CEEMET
	FIN (Federation of Nautical Industries)	ND – ND	ND – ND		It negotiates sectoral collective agreement at national level for the NACE 35.12 sub-sector	No
Germany	Gesamtmittel Nord-West-Metall (Employers' Association for the Metal and Electrical Industry North-West-Metal)	40 of which 6 shipyards – 6%	Approx. 14,550 of which 3,985 in the yards – 16%	Mutual recognition system	It negotiates sectoral collective agreement for metal and electrical industries at regional level	No
	Gesamtmittel Metall Unterweser (Employers' Association for the Metal and Electrical Industry Metal Unterweser)	ND – ND	36,600 in total – ND		It negotiates sectoral collective agreement for metal and electrical industries at regional level	No
	Gesamtmittel Nordmetall (Employers' Association for the Metal and Electrical Industry North-Metal)	250 of which approx. 25 yards – 25%	8,000 in the shipbuilding – 32%		It negotiates sectoral collective agreement for metal and electrical industries at regional level	No
	VSM (German Shipbuilding and Ocean Industries Association)	110 in all; 60 in NACE 35.11 – 76% of NACE 35.11	21,195 in NACE 35.11 – 95% of NACE 35.11		It does not negotiate collective agreements	CESA ; EMEC
Greece	GSEVEE (General Confederation of Greek Small Business & Trades)	ND – ND	ND – ND	This organization is recognized as representative at national level	It concludes various sectoral collective agreements at national level	UEAPME
	ENEPEM (Association of Metal Production and Processing Industries of Piraeus)	60 in all; ND for NACE 35.1 – ND	ND – ND	ND	It concludes sectoral collective agreements for metal industry workers at national level	European Federation of Metal Industries
	ENAP (Association of Piraeus Shipbuilders)	300 in all; ND for NACE 35.1 – ND	ND – ND	ND	It concludes sectoral collective agreements at local level	No
	Association of Artisans – Employers-Mechanics of Piraeus	78 in all; ND for NACE 35.1 – ND	ND – ND	ND	It concludes sectoral collective agreements at local level	No
	Association of Contractors of Vessel Woodworks of Piraeus Area	21 in all; ND for NACE 35.1 – 100% of the sub-sector in the region	ND – ND	ND	It concludes sectoral collective agreements at local level	No

	Association of Sandblasting, Painting & Cleaning Contractors of Attica	37 in all; ND for NACE 35.1 – ND	ND – ND	ND	It concludes sectoral collective agreements at local level	No
	Association of Electricians for Shipbuilding and Ship-Repair Activities of Piraeus	Around 100 – ND	ND – ND	ND	It concludes sectoral collective agreements at local level	No
	EENB (Association of Hellenic Shipbuilding and Ship-repairing Industries)	3 – EENB represents the three larger shipyards	3,174 – 49% of NACE 35.11	ND	It does not take part in collective bargaining for the sector	CESA
	Association of Perama Shipyard Owners	ND – ND	ND – ND	ND	It does not take part in collective bargaining for the sector	No
Hungary	There is no employers' organization active in the sector					
Ireland	IMF (Irish Marine Federation)	90 in all; 4 for 35.1 – 80% of the marine industry	ND – ND	No recognition measure	It does not take part in collective bargaining	EURMIG
Italy	Federmeccanica (Italian Federation of Metalworking Industries)	ND – ND	ND – ND	The Italian recognition system is highly informal and uncertain and constitutional principles contrast with actual practice. Indeed, the Constitution states that only "registered" trade unions are allowed to sign collective agreements, but in practice, <i>mutual recognition</i> is the only principle governing the negotiation of national collective agreements	It negotiates and signs sectoral collective agreement for the metalworking sector	No
	Assonave (Italian Association of Shipbuilders)	15 – ND	7,765 – 41.2% of NACE 35.11		It does not play any role in collective bargaining	CESA; EMEC
	UCINA (National Union of Shipyards and Shipbuilding and Allied Industries)	About 400 – about 21% of NACE 35.12	ND – ND		It does not play any role in collective bargaining	No
	Unionmeccanica (Italian Association of Small and Medium-sized Metalworking Industries)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreement for the metalworking sector	No
	ANCPL (National Association of Manufacturing and Labour Co-operatives)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreement for the metalworking sector	CECOP

	Federlavoro e Servizi (National Federation of Manufacturing and Labour Co-operatives)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreement for the metalworking sector	No
	AICPL (Italian Association of Manufacturing and Labour Services Co-operatives)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreement for the metalworking sector	No
	FNAM (National Federation of Metalworking Artisans)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreement for the metalworking sector	No
	Assomeccanica (National Mechanical Engineering Association)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreement for the metalworking sector	No
	CASA (Independent Confederation of Artisans' Organisations)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreement for the metalworking sector	No
	CLAAI (Confederation of Italian Free Crafts Associations)	ND – ND	ND – ND		It negotiates and signs sectoral collective agreement for the metalworking sector	No
Latvia	Mašīnbūves un Metālapstrādes Rūpniecības Uzņēmēju asociācija (Association of Mechanical Engineering and Metalworking Industries of Latvia)	97 in all – 12-13% (estimate)	ND – ND	The social partners have no formal or reciprocal recognition systems	It does not take part in collective bargaining for the shipbuilding sector	ORGALIME
Lithuania	LLSRA (Association of Lithuanian Shipbuilders and Ship Repairers)	28 – 30% (estimate)	5,100 – 90% (estimate)	ND	It does not have the power to negotiate or sign collective agreements.	No
Malta	Malta Boat Builders' Federation	11 – 91.6% (NACE 35.12); 73.3% (NACE 35.1)	40 – 66.7% (NACE 35.12) ; 2.1% (NACE 35.1)	ND	It does not take part in collective bargaining	No
Poland	ZPFO (Association of Polish Maritime Industries)	35 – ND	32,000 – 91%	This organization is recognized as representative	It is empowered to sign sectional collective agreements at national level	CESA

Portugal	AIM (Maritime Industries Association)	45 – 16.9%-27.3% of NACE 35.1 (depending on the source)	ND – 90% of NACE 35.1	Organisations that take part in collective bargaining in the sector are automatically recognised as representative.	It does not take part in sectoral collective bargaining. It is represented in collective bargaining by the National Metal Federation (FENAME) to which it is affiliated.	CESA	
	AIMMAP (Association of Metallurgical, Metal Mechanics and Similar Industries of Portugal)	5 in NACE 35.1 – 1.9%-3% (depending on the source)	313 in NACE 35.1 – 5.6%-6.6% (depending on the source)			It signed a sectoral Collective Labour Contract covering the metalworking sector (including the ship building and repair sector)	No
	ANEMM (National Association of Metalworking Industries)	About 5 in NACE 35.1 – 1.9%-3% (depending on the source)	ND – ND			It does not take part in sectoral collective bargaining. It is represented in collective bargaining by the National Metal Federation (FENAME) to which it is affiliated.	CEEMET ; ORGALIME ; FEM ; CEMA
Slovak Republic	No employers' organisation represents the shipbuilding sector.						
Slovenia	ZKI (Metal Processing Industry Association)	40 in NACE 35.1 – 100%	551 in NACE 35.1 – 100%	Mutual recognition	ZKI signed a collective agreement covering sectors NACE 27 to NACE 35. It is currently involved in negotiation of a new collective agreement.	ORGALIME	
Spain	UNINAVE (Spanish Union of Shipbuilders)	22 – 1% of NACE 35.1	13,500 – 54% of NACE 35.1	The law establishes that the proportion of negotiating rights for employers' organisations is based on the number of workers in the companies affiliated to their organisation	It does not intervene in the collective bargaining process with the unions.	CESA	
	AEDIMAR (Spanish Association of Maritime Equipment Industries)	250 – 11%	10,500 – 42%			It does not intervene in the collective bargaining process with the unions.	EMEC
	PYMAR (Small and Medium-sized Shipyards in Process of Restructuring S.A.)	23 – 1%	2,523 – 10%			It does not take part in the bargaining process leading to collective agreements.	No
	CONFEMETAL (Spanish Confederation of Metalworking Employers' Organisations)	ND – ND	ND – ND			Although it does not itself take part in collective bargaining, the provincial level collective agreements in the metal industry affecting companies in shipbuilding are nevertheless negotiated by territorially based employers' associations which are overwhelmingly affiliated to CONFEMETAL.	CEEMET
Sweden	Teknikföretagen (The Association of Swedish Engineering Industries)	17 in NACE 35.1 – 4.2%	403 in NACE 35.1 – 11.2%	ND	It negotiates and signs sectoral collective agreements for blue-collar workers and white-collar workers	CEEMET; ORGALIME	
	Metallgruppen (The Association of Swedish Metal Industries)	1 in NACE 35.1 – 0.3%	147 in NACE 35.1 – 4.1%			It negotiates and signs sectoral collective agreements for blue-collar workers and white-collar workers	No

	TMF (The Association of Wood and Furniture industries)	10 in NACE 35.1 – 2.5%	500 in NACE 35.1 – 13.9%		It negotiates and signs sectoral collective agreements for blue-collar workers and white-collar workers	CEI-BOIS
The Netherlands	VNSI (Netherlands' Shipbuilding Industry Association)	165 – 95% in building of sea ships; 65% in repairing of ships; 55% in building of small ships	ND – ND	Mutual recognition	VNSI does not directly participate in collective bargaining for the sector (it participates indirectly through its membership of higher level national federation).	CESA
	FME-CWM (Federation for the Metal and Electrical Industry – Contact Group of Employers in the Metal Industry)	165 in NACE 35.1 – around 95% in NACE 35.1 (estimate)	ND – ND		It negotiates and signs sectoral collective agreements	CEEMET
	Koninklijke Metaalunie (Royal Metalunion)	200 in the yacht building industry, 50 in the shipbuilding industry and 75 shipbuilding supply companies – 90-95% in NACE 35.12	3,800 in NACE 35.1 (estimate) – ND		It does not directly participate in collective bargaining for the sector (it participates indirectly through its membership of a higher level national federation).	No
	HISWA Vereniging (Dutch Boating Industry Association)	1,100 in all – 60% of NACE 35.12	ND – ND		It negotiates and signs sectoral collective agreements	EURMIG
United Kingdom	SSA (Shipbuilders and Shiprepairers Association)	50 – ND	ND – ND	ND	It participates in collective bargaining in the sector but this is infrequent, and generally on a company-by-company basis rather than industry-wide.	CESA

Source: National reports

ND: No data

The Community of European Shipyards' Associations (CESA) has members in 11 of the 24 countries taken into account in this study¹⁶. CESA has no affiliated member in Austria, Belgium, the Czech Republic, Cyprus, Estonia, Hungary, Ireland, Malta, the Slovak Republic, Slovenia, Latvia, Lithuania and Sweden. In three of these countries (the Czech Republic, Hungary and the Slovak Republic), no national employers' organisation represents shipbuilding companies. Furthermore, in Austria, Belgium, Cyprus, Estonia, Latvia and Sweden, employers' organisations active in the sector are not exclusively dedicated to the shipbuilding industry but usually cover the wider metalworking sector or the engineering industry. Employers' organisations exclusively representing shipbuilding companies exist in the remaining three countries (Ireland, Malta and Lithuania). None of these belongs to CESA but the Association of Lithuanian Shipbuilders and Ship Repairers (LLSRA) is currently preparing to join the European organisation.

¹⁶ In addition, the organisation has members in Romania, Croatia and Norway. These countries are not covered by this comparative study.

Generally speaking, member organisations of CESA include some or all of the main employers' organisations in the *Building and Repairing of ships sub-sector* (NACE 35.11). Furthermore, all these organisations represent a high density of employment in the sector (employment density is generally over 50% and over 90% in Germany, Finland, Portugal, Poland and the Netherlands).

As for sectoral collective bargaining, the majority of CESA members do not take part in negotiations. Only members in Poland and the United Kingdom are involved in collective bargaining in the sector (mainly at company level in the case of the United Kingdom since no sectoral negotiations take place in this country). Members in the Netherlands and Portugal also participate in collective bargaining for the sector, but only indirectly (through their membership of higher level national federations).

4. Description of social dialogue in the sector

1. European level

On 17 September 2003, CESA and EMF officially commenced a European-level social dialogue for the shipbuilding industry, within the framework of a sectoral social dialogue committee set up under the auspices of the European Commission. The main aims of European-level sectoral social dialogue in shipbuilding are as follows¹⁷:

- to maintain the profitability of the sector
- to guarantee future industrial perspectives for the European shipbuilding industry
- to support the sector's competitiveness
- to maintain a high level of quality jobs.

2. National level

The structure of social dialogue in each of the countries considered is diverse and complex. In some countries, tripartite¹⁸ consultation for the shipbuilding industry takes place (Cyprus, Ireland, Poland, Spain, the Netherlands and the United kingdom). In the others, the structure of social dialogue in the sector is purely bipartite.

Basic features of tripartite concertation specifically for the shipbuilding sector

Country	Existence	Basic features of tripartite concertation	Results
Austria	No	/	/
Belgium	No	/	/
Cyprus	Yes but occasionally	Tripartite social dialogue usually takes place when bipartite social dialogue has failed to resolve a dispute	One agreement was signed in the shipbuilding industry sector during 2003-2004
Czech Republic	No	/	/

¹⁷ Minutes of the sectoral social dialogue committee for shipbuilding, Brussels, 26 November 2003.

¹⁸ *Tripartite* consultation is characterised by the involvement of the government and the social partners (trade unions and employers' organisations) while *bipartite* dialogue exclusively involves the social partners.

Denmark	No	/	/
Estonia	No	/	/
Finland	No	/	/
France	No	/	/
Germany	No	/	/
Greece	No	/	/
Hungary	No	/	/
Ireland	Yes	The Irish Marine Forum provides a platform for discussion for the various actors in the sector	/
Italy	No	/	/
Latvia	There is no tripartite concertation that deals specifically with the shipbuilding sector, although representatives of shipbuilding industry organisations participate as experts and consultants when matters relevant to the sector are being considered in the National Tripartite Cooperation Council (quite infrequent).		No collective agreements are signed at this level
Lithuania	No	/	/
Malta	No	/	/
Poland	Yes	In the two regions in the north east of Poland, Szczecin and Gdansk, where the shipbuilding sector is particularly well established, provincial tripartite commissions meet regularly and raise issues relating to the shipbuilding sector.	No formal collective agreements are signed at this level.
Portugal	No	/	/
Slovak Republic	No	/	/
Slovenia	No	/	/
Spain	Yes but occasionally	There is no permanent tripartite concertation forum. Tripartite social dialogue only takes place at particular times, dealing with specific questions.	/
Sweden	No	/	/
The Netherlands	Yes	There are regular consultations between members of parliament, the social partners and other representatives of the maritime cluster within the so-called Round Table Group Shipbuilding Industry.	No collective agreements are signed at this level
United Kingdom	Yes	Negotiations take place within the <i>Building and Marine Industries Forum</i> (The Forum provides a mechanism for closer co-operation between the various stakeholders in the industry) and the <i>Sector Skills Council for Science, Engineering and Manufacturing Technologies Sector skills councils</i>	Cooperation Agreements

Source: national reports

Basic features of bipartite social dialogue for the shipbuilding sector by country

	Structure of sectoral bipartite social dialogue for the shipbuilding industry	Collective agreements	Coverage rate
Austria	The shipbuilding industry is integrated into the associational system of industrial relations for the broader metal-working industry. Collective bargaining is differentiated by employee categories.	2 collective agreements (one for blue-collar, one for white-collar) are regularly concluded yearly.	100%
Belgium	Social dialogue in the shipbuilding industry takes place at sectoral level in two Joint Committees: one covers blue-collar workers in the steel, and mechanical and electrical construction sectors; the second covers white-collar workers in metal	Together, these joint committees concluded 11 sectoral collective	100%

	manufacturing.	agreements in 2004	
Cyprus	Collective bargaining in the shipbuilding sector is structured at enterprise level, the main reason for this being the absence of an established employers' organization in the sector. (Four enterprise-level collective agreements)		
Czech Republic	The scope of social dialogue in this sector is minimal, and takes place in only one enterprise, albeit the biggest in the sector. One collective agreement has been signed in this framework covering 40% of the workers in the sector, but it expired in 2004. No new agreement has been signed since then.		
Denmark	The Danish model of collective bargaining is characterized by centralized decentralization: A central collective agreement concluded at sectoral level provides the framework for a bargaining process at enterprise level (local). In the case of the shipbuilding industry, this sector constitutes part of the Industry and is thus covered by the central/sectoral collective agreement called "Industry Agreement". Moreover, the sector is covered by two sectoral agreements, one covering building and repair of small boats and the second the entire metal industry (including NACE 35.1). It should also be noted that an informal but active dialogue on shipbuilding sector issues is held between trade unions and employers of the sector.	- The Industry Agreement (central collective agreement) - Two sectoral agreements	ND
Estonia	In Estonia, collective bargaining for the shipbuilding industry takes place in only one enterprise: Loksa Shipyard's. A collective agreement covering all employees in the enterprise (31.7% of workers in the sector) is renewed yearly.		
Finland	Collective bargaining functions mainly at sectoral level but is also influenced by national tripartite negotiations. In the shipbuilding industry, the sector is not unified: NACE 35.12 is under the collective agreement for the entire metalworking sector, and NACE 35.11 is covered by two agreements – one for the boat building sub-sector and one for the chemical industry. NACE 35.1 workers are also covered by collective agreement for electrical workers in all sectors of activity and by collective agreement for white-collar employees in all sectors of activity.	Various collective agreements covering different fields of activity	Around 90%
France	Sectoral collective bargaining for the shipbuilding industry is not unified. NACE 35.11 is covered by bargaining for the entire metalworking industry taking place at two levels: national and regional (these levels are interconnected). By contrast, NACE 35.12 is covered by a national collective agreement covering this field of activity alone.	Various collective agreements covering different fields of activity	100% (extension of all agreements)
Germany	Sectoral collective bargaining takes place at regional level in Germany. In the framework of collective bargaining, the shipbuilding industry is included in the metalworking and electrical industries.	13 regional agreements	ND (considered high)
Greece	Sectoral collective bargaining takes place at national level and local level: At national level, the shipbuilding industry is included in the metalworking sector; at local level, various collective agreements cover different sub-categories of NACE 35.1	7 sectoral collective agreements (4 local agreements and 2 nation-wide agreements)	100%
Hungary	Collective bargaining for the shipbuilding industry is only developed at enterprise level, in only one enterprise.		
Ireland	There is no sectoral collective bargaining for the shipbuilding industry.		
Italy	At national level, the shipbuilding industry is covered by four collective industry-wide agreements for the metalworking sector, and applying to four different types of companies: industrial companies; SMEs; co-operatives; craft companies.	4 collective industry-wide agreements	The majority of workers are covered
Latvia	Bipartite social dialogue in the sector only takes place at enterprise level (coverage rate: around 9%)		
Lithuania	Collective bargaining only takes place at enterprise level		
Malta	Collective bargaining only takes place at the enterprise level; there is no sectoral collective bargaining. Only two enterprises are covered by a collective agreement: the state-owned Malta Shipyard Ltd and the private-sector Bezzina Ship Repair Yard, but 95.8% of the total number of salaried workers are covered by these agreements.		
Poland	There is regular sectoral social dialogue for the Maritime Industries but no collective agreements have been concluded. As a result, collective agreements only exist at company level in this sector (it is estimated that around 90% of workers in the	/	/

	sector are covered by enterprise-level collective agreements).		
Portugal	Bipartite collective bargaining for the shipbuilding and repair sector takes place at the sectoral level. This sector is included within the umbrella agreement for the entire metalworking sector.	4 collective labour contracts	100% (via an extension procedure)
Slovak Republic	A collective bargaining process takes place in the only enterprise active in the sector. A collective agreement is signed every year with the employer. All workers in the company are covered by the agreement (100% of workers in the sector are covered).		
Slovenia	A broad sectoral collective bargaining system covers NACE 27, 28, 29, 30, 31, 32, 33, 34 and 35.	1 sectoral collective agreement	100%
Spain	For the industry as a whole there are 15 company-level collective agreements that cover the main shipyards. These agreements cover employment conditions for approximately 50% of the industry workforce. Companies which do not have their own negotiated agreement (some shipyard companies, but above all those in the supply sector), apply the engineering and metalworking collective agreements negotiated at provincial or autonomous community level.	20 sectoral collective agreements	Around 50% of the industry workforce
Sweden	Collective bargaining related to shipbuilding activities takes place at the industry level. Strictly speaking, however, shipbuilding does not constitute a united collective bargaining sector, but belongs to three separate sectors: engineering, iron and steel, and wood products.	6 sectoral collective agreements cover shipbuilding: three for blue-collar workers and three for white-collar workers.	Around 90% (estimate)
The Netherlands	From the point of view of collective bargaining, the sector is not unified and is covered by four different sectoral collective agreements. Most activities of NACE 35.11 and part of NACE 35.12 are under umbrella agreements for the metalworking and electrical engineering sector. Other activities of NACE 35.11 as well as a large part of NACE 35.12 are under the umbrella agreement for the metalworking and technology-based branches. Lastly, activities of building and repairing pleasure and sporting boats with a wooden or synthetic hull (part of NACE 35.12) are covered by a specific branch agreement.	4 sectoral collective agreements	100% (extended)
United Kingdom	As is the norm in the United Kingdom, collective bargaining on pay and conditions takes place at company level. There are no industry-level agreements.		

Source: National reports

ND: No data

In many countries, sectoral collective agreements cover a large percentage of employees in the sector.

The structure of bipartite collective bargaining for the shipbuilding industry varies appreciably from one country to the next:

- In the majority of the countries studied, the shipbuilding sector is not covered by any sectoral collective bargaining process (case of Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, the Slovak Republic and the United Kingdom). In these countries, collective bargaining only takes place at the enterprise level. Reasons leading to this situation can be many:
 - Absence or weakness of representative trade union organisations or employers' organisation in the sector;
 - Very small number of enterprises in the sector;
 - Predominance in the sector of one or two large firms along with a plethora of micro-firms;

- Inter-union disputes;
- etc.
- In seven other countries, the shipbuilding sector is integrated into the industrial relations system that relates to a wider sector (generally the metalworking industry). This is the case in Austria, Belgium, Germany, Italy, Portugal, Sweden and Slovenia;
- In Poland, institutionalised social dialogue covers exclusively the Maritime Industries. However, no collective agreement has been signed at this level;
- In Ireland, social dialogue in the sector takes place solely on a tripartite basis. No collective agreements are signed at this level;
- In the remaining countries, we observe a particular structure for collective bargaining. In Finland and France, for example, NACE 35.11 and 35.12 are totally independent and under separate collective bargaining.

Summary Table: Levels of social dialogue in the shipbuilding industry

	TRIPARTITE	BIPARTITE	
		Sectoral level	Enterprise level
Austria		X	X
Belgium		X	X
Cyprus	X (occasionally)		X
Czech Republic			X
Denmark		X	X
Estonia			X
Finland		X	X
France		X	X
Germany		X	X
Greece		X	
Hungary			X
Ireland	X (discussion)		
Italy		X	X
Latvia			X
Lithuania			X
Malta			X
Poland	X (regional level)	X (no collective agreements concluded)	X
Portugal		X	X (no collective agreements concluded)
Slovak Republic			X
Slovenia		X	
Spain	X (occasionally)	X	X
Sweden		X	X
The Netherlands	X (discussion)	X	X
United Kingdom	X		X

Source: National reports

THE SHIPBUILDING INDUSTRY IN THE CANDIDATE COUNTRIES: BULGARIA, ROMANIA AND TURKEY

1. Delimitation and scope of activities of the sector

In Bulgaria and Romania, activities included in the sector correspond to NACE 35.1 “Building and repairing of ships and boats”. In Romania, the sector also incorporates activities that are excluded from NACE 35.1 (e.g. the manufacture of propellers, ship engines, navigational instruments, and accessories and equipment for the building and repair of ships). In Turkey, activities included in the shipbuilding industry sector vary depending on the source.

2. Socio-economic features of the sector

In Bulgaria, sector 35.1 constitutes a small industry (0.19% of national GDP). The sector’s economic indicators (GDP and added value) have tended to decline recently. The number of companies is also falling and the privatization process has led the sector to the brink of bankruptcy. In short, the sector is disappearing.

The Romanian shipbuilding industry has a history, tradition and experience of over 160 years. It has been favoured by the country’s geographical location near the Black Sea and on the Danube. Today, according to Lloyd’s Register Fairplay Service statistics, the Romanian shipbuilding sector is a major player on the European and international market in terms of volume of activity.

Turkey has the largest shipbuilding industry in the Middle East and the Balkans. Today, the essential feature of this industry is the existence of a multi-layered sub-contracting system and extensive informal employment.

3. Description of the organisations active in the sector

1. Workers’ organisations

Two organisations represent shipbuilding industry workers in Bulgaria: The *Metal-Electro National Trade Union Federation* and the *Podkrepa Trade Union Federation of Machine-builders and Metalworkers*. They are not limited to the shipbuilding industry, but also extend to related sectors. These organisations have the power to negotiate and sign sector-level collective agreements.

In Romania, the *Federation of Romanian Naval Industry Employees* (FESINAR) represents shipbuilding industry workers. FESINAR takes part in negotiations and signs collective agreements at enterprise level.

Two organisations are active in the shipbuilding industry in Turkey. On the one hand, the *Union of Port Dock and Shipbuilding Industry Workers of Turkey* (DOK GEMİ-İŞ) negotiates and signs collective agreements at enterprise and establishment levels. On the other, the *Union of Port, Dock, Ship Building and Repairing* (LİMTER-İŞ) is a very small union. It managed to reach the industry threshold figure by recruiting more than 10% of the workforce in the shipbuilding industry in 2000, although it has not yet succeeded in signing a collective agreement.

2. Employers’ organisations

In Bulgaria, a single employers’ organisation, the *Bulgarian Branch Chamber – Machine-building*, negotiates and signs collective agreements applying to the shipbuilding industry.

In Romania, some shipbuilding companies are affiliated to the *Machine-Building Industry Employers' Federation* (FEPA-CM). This organisation negotiates and signs a collective agreement at branch level. This agreement covers the entire machine building branch. Some companies are affiliated to the *National Association of Shipbuilders in Romania* (ANCONAV), which is not an employers' structure but a professional association. ANCONAV does not negotiate or sign collective agreements. It is affiliated to CESA.

The *Shipbuilders Employer Associations of Turkey* (GİSBİR) and the *Heavy Industry and Service Sector Public Employer Union of Turkey* (TÜHİS) represent shipbuilding companies in Turkey. GİSBİR is not a formally recognised employers' body, but a lobbying organisation. It therefore does not formally participate in collective bargaining, but it does informally negotiate a group collective agreement with the Dok Gemi-İş.

4. Description of social dialogue in the sector

In Bulgaria, social dialogue for the sector takes place at tripartite level and at bipartite sector-level and enterprise level. In this framework, the shipbuilding industry is integrated into the industrial relations system for the metal industry as a whole. The sector and company levels operate in parallel: if there is no sector-level collective agreement, enterprises do not conclude company-level agreements.

In Romania, the most developed form of social dialogue is to be found at enterprise level. It should be noted, however, that ANCONAV, which is a professional association, acts as a dialogue partner to the trade union in the sector. It invites FESINAR to consultative and other meetings with representatives of government and with the Boards of Directors of enterprises affiliated to the Association, on issues of common interest to the sector. It is not a negotiating partner, however.

In Turkey, the main social dialogue mechanism is collective bargaining at establishment and enterprise level. The trade union and GİSBİR are currently negotiating a group collective agreement, however.