

UNIVERSITE CATHOLIQUE DE LOUVAIN
Institut des Sciences du Travail



SUMMARY

STUDY ON THE REPRESENTATIVENESS OF THE SOCIAL PARTNER
ORGANISATIONS IN THE FISHING INDUSTRY

EU25 and Bulgaria, Romania, Turkey

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¹ Its approval by the Commission does not imply the approval of any of the European organisations as to its content.

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 VT/2002/83).

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 1993², 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 document³ 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 communication⁴ 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*⁵. In the respect of the three criteria set up by the Commission, as has been pointed out in previous studies⁶, *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 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 process*⁷. 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 level*⁸.

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*

² COM(93) 600 final of 14 December 1993, Communication from the Commission concerning *the application of the Protocol on Social Policy*.

³ COM(96) 448 final of 18 September 1996 concerning *the development of the SD at Community level*.

⁴ COM(98) 322 final of 20 May 1998, Communication from the Commission, *Adapting and promoting the SD at Community level*.

⁵ COM(2002) 341 final of 26 June 2002, Communication from the Commission, *The European SD, a force for innovation and change*.

⁶ 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.

⁷ *Op cit*.

⁸ *Op cit*.

an important aspect for the future involvement of the candidate countries' social partners in the social dialogue activities developed at European and national level⁹.

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 histories¹⁰.* By and large, most of the countries studied are notable for strongly developed tripartism, but for weakness at central bipartite level, in social dialogue at sector level, and at the level of organisations, particularly employers' associations.

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 researchers was set up throughout the 25 European Union Member States, as well as in Bulgaria, Romania and Turkey. These researchers are experts in industrial relations and 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 Fishing industry 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 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 recognition¹¹. 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 a brief explanation of the expert.

The consultation for this report on the Fishing industry took place during the months of September-October 2006.

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 2006. Interviews with the organisations took place, and the national reports were written, between March and April 2006 for the New Member States and Bulgaria, Romania and Turkey and between May and July 2006 for the former EU-15 countries.

⁹ *Enlargement of the European Union. Guide to the negotiations. Chapter by chapter*, European Commission, DG Enlargement, June 2003.

¹⁰ Léonard E., Spineux A., *Les relations industrielles en Europe aujourd'hui*, Institut des Sciences du Travail, UCL, 2003 (unpublished).

¹¹ 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.

NACE NOMENCLATURE¹²

Once again, we find that the delimitation of sectors may vary from one country to another, according to national traditions and the particularities and this is a significant element in the research. Indeed, the structure of employers' organisations and trade unions as well as the organisation of the social dialogue can cover sub-sectors or different trades/professions.

Following a consensus between the European Commission and the Institut des Sciences du Travail, the following activities are to be taken into account:

- a) the activities included within the NACE classification: 05, i.e. fishing and related service activities.
- and
- b) the activities that the "fishery statistics" domain contains:
 - landings of fishery products in the ports of the EU;
 - catches of fish, crustacean, molluscs and other aquatic organisms;
 - catches of tuna and tuna-like species;

Fish farming and aquaculture production are excluded from the list.

The delimitation is presented as an indication.

THE ORGANISATIONS TAKEN INTO ACCOUNT IN THE REPORT

The organisations taken into account in the report respond to the following criteria:

If collective bargaining takes place at sector level for the fishing sector, all organisations taking part in sector-level collective bargaining have been taken into account.

If no collective bargaining takes place at sector level for the fishing sector, all organisations taking part in collective bargaining at any other level, but that are relevant for the sector, have been taken into account.

and/or:

The organisations which are members of the European organisations taking part to the European sector social dialogue committee(s).

The fishing sector, however, has particular characteristics compared to other, more 'traditional', sectors. One characteristic is the fact that several organisations in the member states do not strictly correspond to the notion of social partners, because they are, for instance, associations of artisans. This type of organisation represents its members both as small entrepreneurs and as workers in the sector. These organisations are presented in the national summaries when they represent all the employers in the sector, that is when all employers are affiliated to the organisation, and when they play an active role in the relationships with social partners in the strict sense, or when they participate in political decision-making on the sector in the country.

¹² Source: COMMISSION REGULATION (EC) No 29/2002 of 19 December 2001, amending Council Regulation (EEC) No 3037/90 on the statistical classification of economic activities in the European Community, In: Official Journal of the European Communities (10.01.2002).

ABBREVIATIONS AND TERMS USED IN THIS REPORT

Self-employed workers: “A self-employed person is defined as an independent worker, who works independently of an employer, in contrast with an employee, who is subordinate to and dependent on an employer” (Source: EIRO – European industrial relations dictionary).

Employee: “An ‘employee’ is a party to an employment relationship characterised as a contract of employment (or contract of service) between the employer and employee.” (Source: EIRO – European industrial relations dictionary).

CB: Does the organisation negotiate and have the power to sign collective agreements at sector level for the sector?

Tripartite social concertation is defined as ‘a process in which the state involves workers’ and employers’ organisations in the policy debate and possibly in decision-making’¹³.

Bipartite social dialogue is defined as ‘a process of cooperation and negotiation between employer and workers’ organisation representatives’¹⁴.

European affiliations: List of European organisations to which the organisation is affiliated.

Others affiliations: List of others organisations (group of countries, international) to which the organisation is affiliated.

%	Per cent
€	Euro(s)
CA	Collective agreement
CB	Collective bargaining
GDP	Gross Domestic Product
NACE	Statistical Classification of Economic Activities in the European Community
ND	no data, i.e. no data are available
SD	Social dialogue
SME	Small-to-Medium Enterprise
SW	Salaried workers

¹³Industrial relations in Europe, European Commission (Directorate-General for Employment and Social Affairs), May 2002, p 92.

¹⁴ Op cit.

SOME ORGANISATIONS' ABBREVIATIONS

BFA	Baltic Fishermen Association
BSRAC	Baltic Sea Regional Advisory Council
CAOBISCO	Association of the Chocolate, Biscuit & Confectionery Industries of the European Union
CECOP	European Confederation of Workers' Co-operatives, Social Co-operatives and Social and Participative Enterprises
CIAA	Confederation of the Food and Drink Industries of the European Union
CISL	Italian Confederation of Workers' Trade Unions
COPA-COGECA	Committee of Professional Agricultural Organisations in the European Union - General Confederation of Agricultural Co-operatives in the European Union
DGB	German Confederation of Trade Unions
EAA	European Aquatic Association
EAPO	European Association of Fish Producers Organisations
ECA	European Confederation of Agriculture
EFAG	European Fishing Action Group
EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
EHPM	European Federation of Associations of Health Product Manufacturers
ETF	European Transport Workers' Federation
ETUC	European Trade Union Confederation
FEAP	Federation of European Aquaculture Producers
FEDOPA	Fédération des organisations de producteurs de la pêche artisanale
FEFAC	European Feed Manufacturers' Federation
FEMTAA	World Federation of Agricultural and Food Workers
GAM	European Flour Milling Association
IADSA	International Alliance of Dietary Food Supplement Associations
ICA	International Co-operative Alliance
ICFTU	International Confederation of Free Trade Unions
IDC	International Dockers Council
IFAP	International Federation of Agricultural Producers
IFBWW	International Federation of Building and Wood Workers
ITF	International Transport Workers' Federation
IUF	International Union of Food
IUF-UITA-IUL	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations
MEDISAMAK	Association of Fishing Professionals in the Mediterranean
NTF	Nordic Transport Workers Federation
Pelagic RAC	Pelagic Regional Advisory Council
PSI	Public Services International
RAC north sea and Baltic	Regional Advisory Councils north sea and Baltic
TUI	Transport Union International
UNI	Union Network International
WLC	World Labour Confederation

Note: The tables have been completed with "ND" when data are not available or "0" when the figure is 0. However, if there are no data, estimates have been made whenever possible.

A. MEMBER STATES OF THE EUROPEAN UNION

1. DESCRIPTION OF THE SECTOR

1.1. Delimitation and scope of activities of the sector

For this comparative review, we have endeavoured, in terms of the specific characteristics of each of the countries studied, to present the activities included in the sector from the statistical point of view. This information clarifies the delimitation applied at national level and serves as a reference for the remainder of this comparative section. We have made every effort to respect, as closely as possible, the different national concepts and realities.

Table 1. Activities included in the sector from the statistical point of view by country

Country	Activities correspond to NACE 05	Other activities included than NACE 05
Austria	X	-
Belgium		NACE 51.3; NACE 52.2; NACE 74.8
Cyprus	X	-
Czech Republic	X	-
Denmark	X	-
Estonia	X	-
Finland	X	-
France	X	-
Germany	X	-
Greece	X	-
Hungary	X	-
Ireland		Nace 05, including aquaculture
Italy	X	-
Latvia	X	Sometimes the fishing sector is not separated from agriculture
Lithuania	X	-
Luxembourg	X	-
Malta	X	-
Netherlands	X	-
Poland	X	-
Portugal	X	-
Slovakia	X	-
Slovenia	X	-
Spain	X	-
Sweden	X	-
The United Kingdom	X	-

Source: national reports

Except for two countries (Belgium and Ireland), where the activities do not exactly correspond to NACE 05 from a statistical point of view, the delimitation is roughly homogeneous.

1.2. Socio-economic features of the sector

This section presents comparative data for each country on the economic weight of the sector and on employment within the sector, as well as the trends relative to number and size of the companies and trends relative to number of employees and their repartition by size of company. The weight of the sector and the employment within the sector, compared to the economy as a whole, can be considered as a good proxy for the economic importance of the sector and data on enterprises and workers give an overview of the economic structure of the sector.

Table 2. Economic weight and employment weight by country

Country	Economic weight	Employment weight
Austria	•ND	•ND
Belgium	•ND	•0.01% of total employment
Cyprus	•0.3% of GDP	•0.26% of total employment
Czech Republic	•ND	•0.04% of total employment
Denmark	•ND	•0.09% of total employment

Estonia	•0.09% of GDP	•0.26% of total employment
Finland	•0.05% of GDP	•0.01% of total employment
France	•< 0.14% of GDP (estimate: 0.07%)	•0.08% of total employment
Germany ¹⁵	•0.003% of GDP	•ND
Greece	•ND	•0.32% of total employment
Hungary	•ND	•ND
Ireland	•0.17% of GDP	•0.24% of total employment
Italy	•ND	•0.23% of total employment
Latvia	•0.11% of GDP	•ND
Lithuania	•0.1% of GDP	•0.1% of total employment
Luxembourg	•0% of GDP	•0% of total employment
Malta	•0.28% of GDP	•±0.09% of total employment
Netherlands	•0.1% of GDP	•0.026% of total employment
Poland	•0.03% of GDP	•ND
Portugal	•ND	•0.2% of total employment
Slovakia	•ND	•0.0087% of total employment
Slovenia	•0.014% of GDP	•0.005% of total employment
Spain	•0.4% of GDP	•0.18% of total employment
Sweden	•0.1% of GDP	•0.0075% of total employment
The United Kingdom	•0.03% of GDP	•0.03% of total employment

Source: national reports

Table 3. Companies (trends relative to number and size) and employees (trends relative to number and repartition by size of company) by country¹⁶

Country	Companies	Employees (+Self-employed workers)
Austria	•NACE 05.01: 150 companies •100% = companies with no employees	•NACE 05.01 : 150 employees (ND) •100% in companies with no employees
Belgium	•NACE 05.1: 107 companies •95.3% = companies with <10 employees	•NACE 05.1 : 377 employees (ND) •85.4 % in companies with <10 employees
Cyprus	•NACE 05.01: 546 companies •80.7% = companies with <10 employees	•NACE 05.01 : 560 employees (+534 self-employed) •87% in companies with <10 employees
Czech Republic	•NACE 05: 627 companies •ND	•NACE 05 : 1,720 employees (+542 self-employed) •ND
Denmark	•NACE 05: 1,849 companies •52.9% = companies with no employees 46.5% = companies with <10 employees	•NACE 05 : 2,072 employees (+978 self-employed) •91,3 % in companies with <10 employees
Estonia	•NACE 05: 123 companies •82.9% = companies with <10 employees	•NACE 05 : 1,068 employees (ND) •42.6% in companies with 50-249 employees 32.6% in companies with <10 employees 24.8% in companies with 10-49 employees
Finland	•NACE 05.01: 387 companies •99.5% = companies with <10 employees	•NACE 05.01 : 121 employees (+149 self-employed) •90% in companies with <10 employees
France	•NACE 05.01: 5,686 companies •95-98% = companies with <10 employees	•NACE 05.01 : 20,600 employees (+7,062 self-employed) •90% in companies with <10 employees
Germany	• NACE 5.01.1: 2,162 companies •ND	• NACE 5.01.1: 1,972 employees (ND) •ND
Greece	•NACE 05: 1,598 companies •94.6% = companies with 0-9 employees	•NACE 05 : 14,180 employees (ND) •ND
Hungary	•NACE 05: 329 companies •ND	•ND •ND
Ireland	•ND •ND	• for sea landings, aquaculture and inland catches activities: 4,455 people (=both employees and self-employed) •ND

¹⁵ Europêche noted that “There is a lack of information about the cutter fisheries, which is not, in general, a sideline business.” Further to this comment, the author of the German report answered that “The lack of information about the cutter fisheries comes from the fact that this sector is not well covered by statistical sources.”

¹⁶If data only on NACE 05.01 are available; if not, NACE 05 is considered.

Italy	<ul style="list-style-type: none"> •NACE 05.01: 6,719 companies •48.34% = companies with no employees 42.37% = companies with <10 employees 	<ul style="list-style-type: none"> •NACE 05.01 : 23,934 employees (+10,198 self-employed) •44.12% in companies with <10 employees 30.04% in companies with 10-49 employees
Latvia	<ul style="list-style-type: none"> •NACE 05: 130 companies •ND 	<ul style="list-style-type: none"> •NACE 05 : 1,804 employees (ND) •ND
Lithuania	<ul style="list-style-type: none"> •NACE 05: 216 companies •31% = companies with no employees •54% = companies with <10 employees 	<ul style="list-style-type: none"> •NACE 05 : 1,290 employees (+19 self-employed) •44%-53% in companies with 10-49 employees
Luxembourg	<ul style="list-style-type: none"> •NACE 05: 0 company 	<ul style="list-style-type: none"> •NACE 05 : 0 employee
Malta	<ul style="list-style-type: none"> •NACE 05: c.a. 25 companies •100% = companies with <10 employees 	<ul style="list-style-type: none"> •NACE 05 : 128 employees (+492 self-employed) •ND
Netherlands	<ul style="list-style-type: none"> •NACE 05.01: 545 companies •53.8% = companies with no employees 42.86% = companies with <10 employees 	<ul style="list-style-type: none"> •NACE 05 : 1,800 employees (+1,500 self-employed) •ND
Poland	<ul style="list-style-type: none"> •NACE 05.01: 1,206 companies •96.6% = companies with <10 employees 	<ul style="list-style-type: none"> •ND
Portugal	<ul style="list-style-type: none"> •NACE 05.01: 444 companies •74.5% = companies with <10 employees 	<ul style="list-style-type: none"> •NACE 05.01 : 4,505 employees (ND) •35.8% in companies with 10-49 employees 25.5% in companies with <10 employees 25% in companies with 50-249 employees
Slovakia	<ul style="list-style-type: none"> •NACE 05: 6 companies •ND 	<ul style="list-style-type: none"> •NACE 05 : 2,313 employees (+28 self-employed) •ND
Slovenia	<ul style="list-style-type: none"> •NACE 05.01: 99 companies •92.9% = companies with no employees 	<ul style="list-style-type: none"> •NACE 05.01 : 41 employees (+92 self-employed) •70.7% in companies with 10-49 employees
Spain	<ul style="list-style-type: none"> •NACE 05: 6,064 companies •55.6% = companies with no employees 28% = companies with <10 employees 	<ul style="list-style-type: none"> •NACE 05 : 29,000 employees (+18,000 self-employed) •53.4% in companies with 10-49 employees 39.7% in companies with <10 employees
Sweden	<ul style="list-style-type: none"> •NACE 05.01: 1,424 companies •92,91% = companies with no employees 	<ul style="list-style-type: none"> •NACE 05 : 282 employees (+1,323 self-employed) •92.6% in companies with <10 employees
The United Kingdom	<ul style="list-style-type: none"> •NACE 05: 3,402 companies •ND 	<ul style="list-style-type: none"> •NACE 05 : 8,000 employees (ND) •ND

Source: national reports

Among the countries where data are available and where fishing activity exists, we observe that the economic weight of the sector varies between 0.03% (Germany) and 0.4% of GDP (Spain). The employment rate generated by the fishing sector accounts for between 0.005% (Slovenia) and 0.32% (Greece) of total employment. However, it is particularly difficult to make estimates because of the difference between the statistical data available. Indeed, some countries present the data for the activities included in the NACE 05 and others for the activities included in the NACE 05.01.

The same situation happens for the number of companies and employees. In this case, one more particularity has to be taken into account because there are sometimes more self-employed workers than employees, who have a contract of employment. Nevertheless, some observations can be brought forward. The sector is clearly dominated by small and very small enterprises. In comparison with other industries, the level of education in the fishing sector is generally low and the workforce is, in most cases, low-qualified and low skilled. Average wages in the sector are on a par with the average for the whole national economy or below it. The great majority of people work in full-time jobs but temporary work is frequent. Even if data on the importance of the underground economy are hard to come by, it seems that its share is probably small.

2. DESCRIPTION OF THE ORGANISATIONS ACTIVE IN THE SECTOR

The situation relative to the organisations active within the sector is heterogeneous. The main objective of this part is to highlight these differences and also the similarities which could appear. We will present the organisations active within the fishing industry sector by country, membership, possible recognition of social partners and role within the CB at sector level, as well as European affiliations.

Note that an important characteristic of the sector is the fact that the line between employers' and workers' organisations is often blurred.

a) Workers' organisations

Table 4. Workers' organisations active at sector level by country in the Fishing Industry

Country	Organisations	Total members (members in the sector)	Possible recognition of social partners	Role in the CB at sector level	European Affiliations
Austria	-	-	-	no CB in the fishing industry at this level	-
Belgium	CSC/ACV	1,600,000	legally recognised	Bargains and signs CA	
	CSC/ACV Transport & Communications	90,000 (±700)			ETF
	FGTB/ABVV	1,300,000	legally recognised	Bargains and signs CA	
	UBOT/BTB	36,645 (604)			ETF
	Federation of Liberal Trade Unions of Belgium	220,000 (ND)	legally recognised	Bargains and signs CA	ETF ETUC
Cyprus	Federation of Transport, Petroleum and Agricultural Workers of Cyprus	6,000 (50)	legally recognised	no CB in the fishing industry at this level	ETF EFFAT
	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union	6,060 (70)	legally recognised	no CB in the fishing industry at this level	-
Czech Republic	The Union of Workers in Agriculture and Alimentation – Association of Free Trade Unions of the Czech Republic	c.a. 90,000 (780)	recognition not necessary ¹⁷	no CB in the fishing industry at this level	EFFAT
Denmark	United Federation of Danish Workers, 3F	321,000 (5,741)	Reciprocally recognised	Bargains and signs CA	ETF
Estonia	-	-	-	no CB in the fishing industry at this level	-
Finland	-	-	-	no CB in the fishing industry at this level	-
France	Fishermen's Union (CFTC)	140,000 (949)	legally recognised	Bargains and signs CA	ETF ETUC
	Maritime union (CFDT)	900,000 (5,500)	legally recognised	Bargains and signs CA	ETF ETUC
	Public facilities, environment, transports and service Federation-Force ouvriere (FEETS- FO)	600,000 (ND)	legally recognised	Bargains and signs CA	ETF ETUC
	federation of maritime union of the CGT (FNSM CGT)	700,000 (ND)	legally recognised	Bargains and signs CA	ETUC
Germany	Ver.di - Unified Service Sector Union	2,4 Mio (180)	.*	no CB in the fishing industry at this level	ETF ND
Greece	Pan-Hellenic Federation of Fishing Workers (POA)	1,200 (1,200)	-	no CB in the fishing industry at this level	-
Hungary	Federation of Trade Unions in Agriculture, Fishing and Water Industry	8,000 (c.a. 250)	legally recognised	no CB in the fishing industry at this level	EFFAT
Ireland	-	-	-	no CB in the fishing industry at this level	-
Italy	Agro-Industry Workers' Federation, FLAI-CGIL	289,170 (ND)	mutual recognition	Bargains and signs CA	EFFAT ETF
	Agriculture and Food Workers' Federation, FAI-CISL	205,079 (ND)	mutual recognition	Bargains and signs CA	EFFAT
	Food Workers' Union, UILA-UIL	146,691 (ND)	mutual recognition	Bargains and signs CA	EFFAT
	Federation of Industry, Trade and Handicraft, FESICA	ND (ND)	-	Bargains and signs CA	-
Latvia	Latvian Fish and Food Industry Workers' Union	1,000 (10)	legally recognised	no CB in the fishing industry at this level	-
Lithuania	-	-	-	no CB in the fishing industry at	-

¹⁷ National law does not require trade union organisations to undergo any kind of recognition procedures for CB and such procedures do not form standard practice in CB.

				this level	
Luxembourg	-	-	-	no CB in the fishing industry at this level	-
Malta	National Cooperative of Fishing Ltd	332 (ND)	legally recognised	no CB in the fishing industry at this level	-
	Cooperative Society of Fishing Ltd	160 (ND)	legally recognised	no CB in the fishing industry at this level	-
Netherlands	CNV Industrial, Food Production and Transport Sectors, Section Meat and Fish	90,000 (346)	reciprocally recognised	Bargains and signs CA	ETF
	Dutch Trade union Federation, Allied Unions	450,000 (ND)	reciprocally recognised	Bargains and signs CA	ETF
Poland	National Maritime Section NSZZ "Solidarność"	8,000 (about 700)	legally and reciprocally recognised	Bargains and signs CA	ETF
	Seamen's & Fishermen's Trade Union Federation	600 (600)	legally and reciprocally recognised	Bargains and signs CA	ETF
Portugal	Trade Union Federation of the Fishing Industry Sector (Fpescas)	ND (ND)	legally recognised	Bargains and signs CA	ETF**
	Trade Union Federation of Workers at Sea (FESMAR)	ND (ND)	ND	Bargains and signs CA	ETF ¹⁸
	Democratic Fishing Trade Union (SINDEPESCAS)	4,350 (4,350)	legally and reciprocally recognised	Bargains and signs CA	ETF
	Trade Union of Officers and Engineers of the Merchant Navy (SOEMMM)	1,100 (60)	legally and reciprocally recognised	Bargains and signs CA	ETF
	National Trade Union of Workers from the Fishing Industry Sector (UGT/Fisheries)	ND (ND)	ND	ND	ND
	Marine Engineers Trade Union (SEMM)	ND (ND)	ND	ND	¹⁹
	Seafarers' Trade Union Federation (FSM)	4,063 (472)	legally and institutionally recognised	Take part in CB for the sector ²⁰	ETF
Slovakia	-	-	-	no CB in the fishing industry at this level	-
Slovenia	Trade Union of Agriculture and Food Industry of Slovenia	13,000 (0)	legally recognised	Bargains and signs CA	EFFAT
	Trade Union of Agri-Foodstuffs of Slovenia	1,200 (20)	legally recognised	Bargains and signs CA	-
Spain	Basque Workers' Solidarity – General Industrial	25,300 (327)	legally recognised	Bargains and signs CA	ETF ETUC
	LAB-Transport and Sea Sector	2,300 (385)	legally recognised	Bargains and signs CA	-
	Galician Multi-Union Confederation	7,900 (2,300)	legally recognised	Bargains and signs CA	-
	Federation of Communication and Transport of Trade Union Confederation of Workers' Commissions	107,000 (1,700)	legally recognised	Bargains and signs CA	ETF ETUC
	General Workers' Confederation - Federation of Transport, Communications and the Sea	ND (ND)	legally recognised	Bargains and signs CA	ETF ETUC
Sweden	-	-	-	no CB in the fishing industry at this level	-
The United Kingdom	Transport and General Workers' Union - TGWU	820,118 (ND)	reciprocally recognised	-	ETF

Source: national reports

* No formal recognition procedures in this country.

¹⁸ETF claims that the European affiliation for the "Trade Union Federation of Workers at Sea (FESMAR)" is unknown. Further to this comment and after verification, the author of the Portuguese report maintains that FESMAR is affiliated to ETF.

¹⁹ETF claims that SEMM is affiliated to its organisation. Further to this comment and after verification, the author of the Portuguese report maintains that SEMM is not affiliated to ETF.

²⁰ FSM does not negotiate or sign CAs, but SIMAMEVIP, which belongs to FSM does negotiate CAs.

** Trade Union Federation of the Fishing Industry Sector (Fpescas) is associated to ETF through FSM.

b) Employers' organisations

Table 5. Employers' organisations active at sector level by country in the Fishing Industry

Country	Organisations	Number members (number employees)	Recognition	Role in the CB at sector level	European Affiliations
Austria	-	-	-	no CB in the fishing industry at this level	-
Belgium	The Professional Association of Belgian Ship-owners	100 (ND)	legally recognised	Bargains and signs CA	EAPO Europêche
	Professional Association of Wholesale Fish Traders	15 (ND)	legally recognised	Bargains and signs CA	-
Cyprus	-	-	-	no CB in the fishing industry at this level	-
Czech Republic	-	-	-	no CB in the fishing industry at this level	-
Denmark	Danish Fishermen's Association	2,000 (ND)	Reciprocally recognised	Bargains and signs CA	Europêche
Estonia	-	-	-	no CB in the fishing industry at this level	-
Finland	-	-	-	no CB in the fishing industry at this level	-
France	Union of French fishing ship-owners (UAPF)	ND (ND)	Legally recognised	Bargains and signs CA	Europêche
	Cooperation, Mutuality and Maritime Credit Confederation (CMCM)	ND (550)	Legally recognised	Bargains and signs CA	COPA- COGECA FEDOPA EAPO
	French Federation of maritime professional unions (FFSPM)	ND (ND)	Legally recognised	Bargains and signs CA	-
	National union of undertakers in the fishing sector (SNCEP)	ND (ND)	Legally recognised	Bargains and signs CA	-
	Maritime union of artisans in the fishing sector CFDT (SYMPA)	ND (ND)	Legally recognised	Bargains and signs CA	-
	National union of skipper artisans in the fishing sector (CFTC)	ND (ND)	Legally recognised	Bargains and signs CA	-
	National union of fishermen artisans (CGT)	ND (ND)	Legally recognised	Bargains and signs CA	-
Germany	-	-	-	no CB in the fishing industry at this level	-
Greece	Pan-Hellenic Middle Range Union of Ship-owners (PEPMA)	±300 (ND)	-	no CB in the fishing industry at this level	Europêche
	Pan-Hellenic Confederation of Unions of Agricultural Cooperatives (PASEGES)	6,350 (ND)	(mutual recognition)*	no CB in the fishing industry at this level	COPA- COGECA
	Confederation of Greek Fishermen (SAE)	ND (ND)	-	no CB in the fishing industry at this level	-
Hungary	National Federation of Fish Producers	110 (ND)	legally recognised	no CB in the fishing industry at this level	FEAP EAA
Ireland	The Irish Fishermen's Organisation	ND (ND)	legally and mutually recognised	no CB in the fishing industry at this level	Europêche
	The Irish Fish Producers' Organisation	ND (ND)	legally and mutually recognised	no CB in the fishing industry at this level	EAPO
	Killybegs Fishermen's Organisation	ND (ND)	legally and mutually recognised	no CB in the fishing industry at this level	EAPO
	The Irish South and West Fish Producers' Organisation	ND (ND)	legally and mutually recognised	no CB in the fishing industry at this level	EAPO

Italy	National Federation of Fishing Enterprises, Federpesca	±2,200 (ND)	mutual recognition	Bargains and signs CA	Europêche
	National Federation of Fisheries Co-operatives, Federcoopesca	466 (24,717)	mutual recognition	Bargains and signs CA	COPA-COGECA
	National Association of Fishing Co-operatives, Lega Pesca	477 (14,300)	mutual recognition	Bargains and signs CA	COPA-COGECA
	Association of the Agri-Food and Fishing Sector, AGCI Agrital	480 (8,971)	mutual recognition	Bargains and signs CA	COPA-COGECA CECOP
	Union of Italian Fishing Co-operatives, UNCI Pesca	ND (ND)	-	Bargains and signs CA	-
Latvia	Latvian Fisheries Association	54 (1,000)	legally recognised	no CB in the fishing industry at this level	-
	Latvian Fisheries Federation	ND (ND)	legally recognised	no CB in the fishing industry at this level	-
	Fishermen's Association of Kurzeme Region	14 (300)	legally recognised	no CB in the fishing industry at this level	-
Lithuania	Fishing Business Association	12 (30-40)	no legal or other recognition as social partners	no CB in the fishing industry at this level	-
	Association of Fishing Companies "Lampetra"	62 (ND)	no legal or other recognition as social partners	no CB in the fishing industry at this level	-
	Fishermen and Fish Processors' Association "The Baltic Fisher"	5-7 (ND)	no legal or other recognition as social partners	no CB in the fishing industry at this level	-
Luxembourg	-	-	-	no CB in the fishing industry at this level	-
Malta	-	-	-	no CB in the fishing industry at this level	-
Netherlands	Ship-owners Association for the Offshore Fishery	3 (1,000)	reciprocally recognised	Bargains and signs	Europêche
	Foundation of the Dutch Fishery	ND (ND)	reciprocally recognised	Does not bargain and sign	Europêche
Poland	-	-	-	-	-
Portugal	Association of industrial fishing ship owners (ADAPI)	80 (1,000)	legally and reciprocally recognised	Bargains and signs	-
Spain	Fishermen's Associations	ND (ND)	legally and reciprocally recognised	Bargains and signs**	ND
	Cooperative of Fishing Ship-owners of the Port of Vigo	397 (8,500)	legally and reciprocally recognised	Bargains and signs**	COPA-COGECA EAPO
	National Union of Spanish Maritime Cooperatives	200 (10,000)	legally and reciprocally recognised	Bargains and signs**	COPA-COGECA
	Spanish Federation of Fishing Organisations	471 (9,500)	legally and reciprocally recognised	Bargains and signs**	Europêche
	Spanish Federation of Fishing Vessel Owners	ND (ND)	legally and reciprocally recognised	Bargains and signs**	Europêche
	Commercial Maritime Union	ND (ND)	legally and reciprocally recognised	Bargains and signs**	COPA-COGECA
	National Federation of Cofradías of Fishermen	ND (ND)	legally recognised	They cannot bargain CA***	Europêche
Slovakia	The Slovak Fishermen's Association	6 (259)	No	no CB in the fishing industry at this level	-

Slovenia	Food Industry Association	1,048 (41)	legally recognised	Bargains and signs	CIAA, CAOBISCO, GAM, FEFAC, EHPM
	Section on Agriculture and Food Industry	82 (0)	legally recognised	Bargains and signs	-
Sweden	Swedish Fishermen's Federation	1,540 (0)	legally recognised	no CB in the fishing industry at this level	Europêche
The United Kingdom	National Federation of Fishermen's Organisations – NFFO	46 (ND)	recognised as a voluntary association	-	Europêche
	Scottish Fishermen's Federation – SFF	8 (ND)	legally recognised	-	Europêche

Source: national reports

* Mutual recognition with a federation which does not cover fishing workers.

**They can negotiate at sector level, but this kind of bargaining is almost non-existent.

***This Federation is a special kind of organisation that cannot bargain CA since it is formed by workers and employers.

Note: Besides the information presented within the tables 4 and 5, it is worth noting that unavailable data on members working in the sector per organisation are due to problems in evaluating the figures, which may occur, for example, if the delimitation of activities within the organisation does not correspond to the national delimitation of the sector.

Thanks to these two tables, we note that organisations generally exist at sector level. If not, this is mainly because CB at sector level does not exist.

Out of the 40 workers' organisations registered in this study²¹, the majority are legally and/or reciprocally recognised and bargain and sign collective agreements at sector level. Within the available data, we quoted twenty-three affiliations to ETF, eight to ETUC and seven affiliations to EFFAT.

Out of the 45 employers' organisations registered in this study²², the same situation occurs: the majority are legally and/or reciprocally recognised and bargain and sign collective agreements at sector level. Within the available data, we quoted fourteen affiliations to Europêche, eight affiliations to COPA-COGECA, six to EAPO and one affiliation respectively to CAOBISCO, CECOP, CIAA, EAA, EHPM, FEAP, FEDOPA, FEFAC and GAM.

3. DESCRIPTION OF THE SOCIAL DIALOGUE IN THE SECTOR

SD can be tripartite and/or bipartite. The former is characterised by the involvement of the government and the social partners (workers' and employers' organisations) and the latter takes place between the social partners, without intervention from the government. After a brief overview of tripartite concertation and its existence in few countries, we will focus on the bipartite SD at sector level in the fishing industry sector.

a) Description of the tripartite concertation in the sector

Table 6. Basic features of tripartite concertation specifically for the sector

Country	Existence	Basic features of tripartite concertation	Agreements
Austria	-	-	-
Belgium	-	-	-
Cyprus	-	-	-
Czech Republic	-	-	-
Denmark	-	-	-
Estonia	-	-	-
Finland	-	-	-
France	X	Concertation takes place in an exceptional context (crisis, in order to adopt measures to modernise the sector)	-
Germany	-	-	-
Greece	-	-	-
Hungary	-	-	-

²¹ See the criterion to include organisations within the study in the introduction of this report.

²² Idem.

Ireland	-	-	-
Italy	X	The Committees aim at defining objectives and guidelines for fishing national policies, as well as expressing an official advice on draft decrees concerning the fishing industry	-
Latvia	-	-	-
Lithuania	-	-	-
Luxembourg	-	-	-
Malta	-	-	-
Netherlands	X	Tripartite concertation is mainly given shape by the bipartite Commodity Board for the Fishery Sector which has regular contacts with government representatives. The ongoing process of consultation on tuning concerns issues of sustainability, economic feasibility, social demands and political acceptance	-
Poland	X	The Trilateral Team represents mainly the interests of trade-ship-owners, but unfortunately not the interests of the fishermen, even those belonging to the trade unions	-
Portugal	-	-	-
Slovakia	-	-	-
Slovenia	-	-	-
Spain	-	-	-
Sweden	-	-	-
The United Kingdom	-	-	-

Source: national reports

Only four countries organise a tripartite concertation process specifically for the fishing sector, even if in France, this only happens in an exceptional context and in Poland, where it represents mainly the interests of commercial ship-owners. On the other hand, even when a tripartite joint body does exist, it does not lead to signed agreements. In conclusion, a tripartite concertation process used effectively and which generates signed agreements does not occur specifically in the fishing industry for the countries studied.

b) Description of the bipartite social dialogue in the sector

Table 7. Basic features of bipartite SD in the Fishing industry by country

Country	Bipartite SD at:			Collective agreements at sector level
	Sector level	Company level	Other institutional level of negotiation	
Austria	-	-	-	-
Belgium	X	-	-	X
Cyprus	-	X	-	-
Czech Republic	-	X	-	-
Denmark	X	X	-	X
Estonia	-	-	-	-
Finland	-	-	-	-
France	X	X	-	X
Germany	-	X	-	-
Greece	-	-	-	-
Hungary	-	X	-	-
Ireland	-	-	-	-
Italy	X	X	-	X
Latvia	-	-	-	-
Lithuania	-	-	-	-
Luxembourg	-	-	-	-
Malta	-	-	-	-
Netherlands	X***	X****	-	X***
Poland	X	X	-	-
Portugal	X	X	-	X
Slovakia	-	-	-	-
Slovenia	X	X	-	X
Spain	X	X	-	X*

Sweden	-	-	-	-
The United Kingdom	X	-	-	X**

Source: national reports

*all agreements are at a provincial or regional level.

**CB over pay does not exist. Negotiation concerns quotas of fishing in selected areas, licences, technical measures and structural policies.

***only at sub-sector level (in the trawl fishery sector)

****only in the fish auction sector (one collective agreement)

In eleven countries, we note the absence of any kind of bipartite bargaining in the fishing sector. In four countries out of fourteen, only company level bargaining exists. Within the ten countries left, we observe that in most of them (eight countries), bipartite bargaining takes place at sector and at company levels. It is also clear that when sector level CB is present (ten countries), most of the time (except in Poland), it leads to collective agreements, even if in some cases, these agreements only concern a geographic area or are very rare.

B. BULGARIA, ROMANIA AND TURKEY

In Bulgaria, the national classification fully corresponds to NACE 05.

The sector seems too small and its contribution to the national economy is negligible in any sense. In terms of economic strategy companies are oriented to catches of crustacean, molluscs, mussels and other aquatic organisms, because these species are more profitable at the moment and are in greater demand for export. The companies are mainly micro or self-owned companies.

According to the national legislation in force, a collective agreement at company level can be concluded on condition that at least 5 workers are unionised. Therefore, there are no active workers' organisations or employers' organisations in the Fishing Industry. Nor are there tripartite or bipartite activities for this particular sector at any level.

In Romania, the activities in the sector included in the official statistics correspond to those included in the 501 and 502 NACE codes, namely fishing, fish breeding and related activities. From the point of view of employers' and employees' organisations, as well as from the perspective of the collective negotiations, the activities included in the 501 and 502 NACE codes include other activities such as processing and preserving of fish and fish products (NACE code 152) and enterprises for the manufacturing of fishing tools, fish breeding research institutes. These additions involve an extension of the activities included, but they are related to fishing and fish breeding.

The relevance of the sector in the total national economy is almost insignificant. At the end of 2004, there were 384 companies operating in the sector. Another 47 companies had activities in the processing and preserving of fish and fish products (NACE code 152)²³. Over 90% of the companies in the sector are financed by private capital. At the end of 2004, the total number of employees was 2,756. In addition, more than 1,643²⁴ people were employees in the processing and fish and fish product preserving sector. The labor force in the sector has continually declined.

Because of the specific conditions in the sector, small companies, a small number of employees in the sector, geographical spread, employees are not organised in powerful trade unions. The most important structure in which tripartite concertation takes place is the Dialogue Commission in the Ministry of Agriculture, formed by representatives of the ministry, the employers' organisations and the trade unions. This commission does not deal exclusively with fishing issues but with the entire range of issues concerning agriculture and the development of the rural environment. There is no collective agreement only for the fishing sector, but one that covers several sectors and is therefore negotiated and signed by representatives of employers and employees in other sectors as well.

The Turkish fishing industry is considered as part of agriculture industry and its share is negligible in total GDP. Marine fishing constitutes nearly 90 percent of production in terms of value and weight. The industry is technologically backward. The Turkish fishing fleet is mainly composed of small vessels. Employment is completely informal.

The seasonal character and its traditional share system, with the existing recruitment patterns, have been the most important impediments to the unionisation and legitimisation of the industry. Nearly all crews are migrants with a low level of education. Despite the informal employment, long work hours, bad working conditions and dissatisfied crews, there is almost no open form of resistance or protest. Consequently, the fishing crew are reluctant to join a union. There seems to be no way for a trade union to organise these crews.

What is more there are no authorised social partners at any level. Thus so far, no collective agreement has been signed in the Turkish fishing industry.

²³ Data provided by the National Institute for Statistics, January 31, 2006.

²⁴ Idem