Representativeness of the European social partner organisations:

Shipbuilding sector

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Abstract

This study provides information designed to encourage sectoral social dialogue in the shipbuilding sector. The aim of Eurofound's series of representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. Top-down and bottom-up analyses of shipbuilding sector in 26 EU Member States covered in the study show that industriAll Europe, on the employees' side, and the European Ships and Maritime Equipment Association (SEA Europe), on the employers' side, are the most important European-level social partner organisations in the shipbuilding sector. (No relevant economic activities are reported in this sector in Ireland and Luxembourg.)

Country codes

AT	Austria	**FI**	Finland	**NL**	Netherlands
BE	Belgium	**FR**	France	**PL**	Poland
BG	Bulgaria	**HR**	Croatia	**RO**	Romania
CY	Cyprus	**HU**	Hungary	**SE**	Sweden
CZ	Czech Republic	**IE**	Ireland	**SI**	Slovenia
DE	Germany	**IT**	Italy	**SK**	Slovakia
DK	Denmark	**LT**	Lithuania	**UK**	United Kingdom
EE	Estonia	**LU**	Luxembourg		
EL	Greece	**LV**	Latvia		
ES	Spain	**MT**	Malta		

Introduction

Objective, concept and methodology

The aim of this representativeness study is to identify the relevant national and supranational social partner organisations – the trade unions and employer associations – in the shipbuilding sector, and to show how these actors relate to the sector's European interest associations of labour and business.[2] The impetus for this study arises from the aim of the European Commission to identify the representative social partner associations consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). Hence, this study seeks to provide basic information needed to support sectoral social dialogue. The effectiveness of European social dialogue depends on whether its participants are sufficiently representative in terms of the sector's relevant national actors across the Member States. Only associations that meet this precondition are admitted to European social dialogue.

In order to implement these key aims, the study first identifies the relevant national social partner organisations in the shipbuilding sector, by means of both a top-down approach (listing the members of the European affiliations) and a bottom-up approach (through Eurofound's network of European correspondents). This involves a clarification of the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector-related'.

A European association is considered a relevant sector-related interest association if:

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

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

- A. the association's domain relates to the sector;
- B. the association is either regularly involved in sector-related collective bargaining and/or is affiliated to any relevant European interest association.

As in other Eurofound representativeness studies, this study applies a top-down as well as bottom-up approach to analysing and mapping the relevant interest representation organisations; this consists of:

- a top-down screening, starting by looking at the sector-related European interest associations and at the affiliations of national associations to them;
- a bottom-up screening, starting by looking at the national organisations involved in sector-related collective bargaining and the collection of data on their affiliation to any European organisation.

Sectoral properties

In order to determine the sector-relatedness, the Statistical Classification of Economic Activities in the European Community (NACE) is the basic reference for the demarcation of economic sectors. The NACE code in each sectoral representativeness study is confirmed by the European Commission after consultation with the social partner organisations.

In this study, the shipbuilding sector is defined as economic activities that include the following NACE (Rev. 2) activities:

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[2] As explained in the section on data collection, this study covers 26 out of the 28 EU Member States. It does not cover Ireland and Luxembourg as these countries have no known economic activities related to the shipbuilding sector.

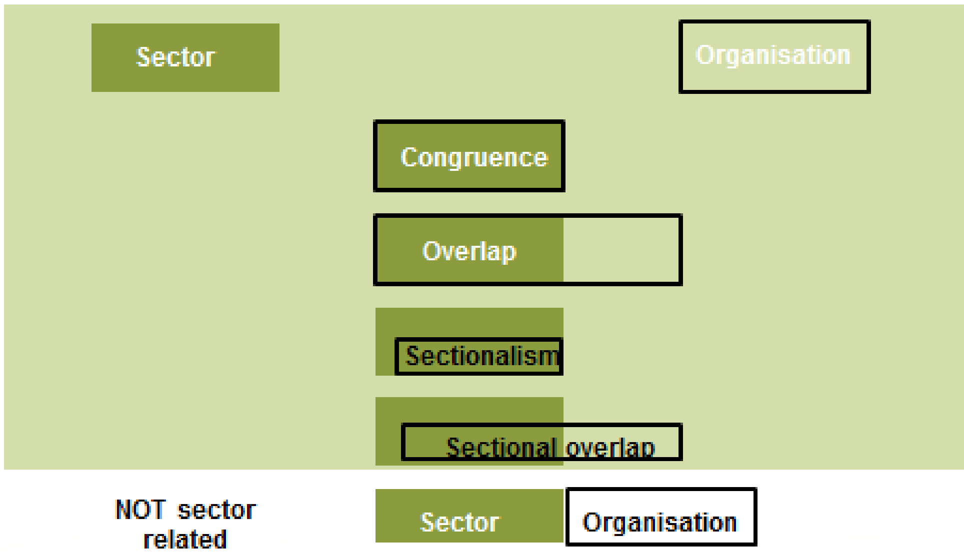
- 28.11 – manufacture of engines and turbines, except aircraft, vehicle and cycle engines;
- 30.11 – building of ships and floating structures;
- 30.12 – building of pleasure and sporting boats;
- 33.15 – repair and maintenance of ships and boats.

Using this NACE-based definition of the sector, the organisations listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU are, on the employees' side, industriAll and, on the employers' side, the European Ships and Maritime Equipment Association (SEA Europe).

Social partner organisations are considered sector-related if their membership domain relates to the sector in one of the ways displayed in Figure 1: Four different patterns are possible in this context:

- **congruence:** the domain is identical with the NACE classification;
- **sectionalism:** the domain covers only a certain part of the sector as demarcated by NACE classification, while no group outside the sector is covered;
- **overlap:** the domain covers the entire sector plus (parts of) one or more other sectors;
- **sectional overlap:** the domain covers part of the sector plus (parts of) one or more other sector.

Figure 1: Sector-relatedness of social partner organisations: Domain patterns



Source: Eurofound

As regards criterion B (affiliation to European-level interest association), it must be said that taking affiliation to a European social partner organisation as sufficient to determine a national association as a social partner does not necessarily imply that the association is involved in industrial relations in its own country. Although this selection criterion may seem odd at first glance, a national association that is a member of a European social partner organisation will become involved in industrial relations matters through its membership of the European organisation. Furthermore, it is important to assess whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective country. Affiliation to a European social partner organisation and/or involvement in national collective bargaining are of utmost importance to the European social dialogue, since they are the two constituent mechanisms that can systematically connect the national and European levels.

Collection of data and quality control

For this study, data were collected only in 26 of the EU28 as no relevant economic activities are reported in the shipbuilding sector as defined above in two Member States: Ireland and Luxembourg.

The collection of quantitative data is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on country studies provided by Eurofound's network of European correspondents, consisting of national industrial relations experts, based on a standard questionnaire, which they have completed by contacting the sector-related social partner organisations in their countries.[3]

The contact was generally made initially via telephone interviews, but also may have been established via email. If any representatives were unavailable, the national correspondents were asked to fill out the relevant questionnaires based on secondary sources, such as information given on the social partner's website, or derived from previous research studies.

In principle, quantitative data can stem from three sources:

- official statistics and representative survey studies;
- administrative data, such as membership figures provided by the respective organisations, which are then used for calculating the density rate on the basis of available statistical figures regarding the potential membership of the organisation;
- personal estimates made by representatives of the respective organisations.

In order to ensure the quality of the information gathered, several verification procedures and feedback loops are expected in the Eurofound representativeness studies.

First, the external expert entrusted with the elaboration of the representativeness study, in collaboration with Eurofound, will check the consistency of the national contributions.

Second, Eurofound sends the national contributions to both their national members of the tripartite governing board, as well as to the European-level sector-related social partners' organisations. The peak-level organisations then ask their affiliates to verify the information. Feedback received from the sector-related organisations is taken into account, given that it is in line with the methodology of the study.

Finally, the European-level sector-related social partners and the Eurofound Advisory Committee on Industrial Relations, which consists of representatives of European and national social partner organisations, governments, academic experts and the European Commission, evaluate the complete study.

[3] The national responses for this study are available from Eurofound on demand.

Economic and employment characteristics and trends

Economic characteristics and trends

The European shipbuilding sector is a major player on the global market and important from both an economic and a social perspective. According to the European Commission's Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, there are about 150 large shipyards in Europe and some 120,000 employees employed by shipyards in the European Union (European Commission, 2016).

The shipbuilding sector is closely linked to other sectors including transport, security, energy, research and the environment, and is regarded a strategic industry in a number of Member States, as well as by the European Commission.

Although European shipbuilders have lost market shares in the global context, there are about 300 shipyards (civil and naval shipbuilding, including repair yards) directly employing about 220,000 people in the European Union (SEA Europe, undated). The European maritime equipment industry provides direct employment to more than 350,000 people and has around 22,000 enterprises (SEA Europe and industriAll, 2016a, p. 4).[5] According to the European Commission, Europe sells 50% of the total marine supplies in the global marine equipment market (European Commission, undated). Indeed, according to SEA Europe, Europe holds a high share of the global maritime production market (around 50%) (SEA Europe and industriAll, 2016a).[6]

Furthermore, shipbuilding is a technology-intensive sector and European providers are world leaders in market segments such as engines and power units, environmental and safety systems as well as electronics and cargo handling.

The shipbuilding sector in many Member States is addressed by national government industrial policy initiatives, often with the strong involvement of the social partner organisations, which traditionally have a strong organisational basis in the sector. At European level, the European Commission is addressing the challenges facing the industry and it supports innovation, research and technological change by a variety of policy measures, based on LeaderSHIP 2020 – a sectoral strategy adopted by the industry, unions and other stakeholders.

In a highly competitive globalised context, the European shipbuilding sector has been facing severe challenges since the 2008 economic and financial global crisis, resulting in significant corporate restructuring. Faced with increased competition from Asia and other regions, national governments, often in close liaison with the social partners, have developed joint initiatives to manage restructuring and to cope with cyclical issues and other fluctuations in demand. A 2007 study by Eurofound on the European shipbuilding and ship repair industry was already showing that external flexibility, through outsourcing and subcontracting, had increased significantly (Eurofound, 2007). In addition, a study published by the EU social partners in the shipbuilding sector highlighted this ongoing development – especially in recent years – in a number of Member States (SEA Europe and industriAll, 2016a, p. 6).

Since 2008, market conditions have worsened. Since the beginning of the 2000, a growth in overcapacity in the shipping and shipbuilding sectors resulting from overproduction, through large new building capacities in Asia (CESA, 2013) and the oversupply in the shipping sector created by speculative ordering in the years before 2008. Once the crisis exploded in 2008, the demand for new vessels collapsed and the global order books decreased year on year until signs of recovery were seen in 2012.[9]

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[5] For additional information, see Figures A1 and A2 in the annex.

[6] For additional information, see Figure A3 in the annex.

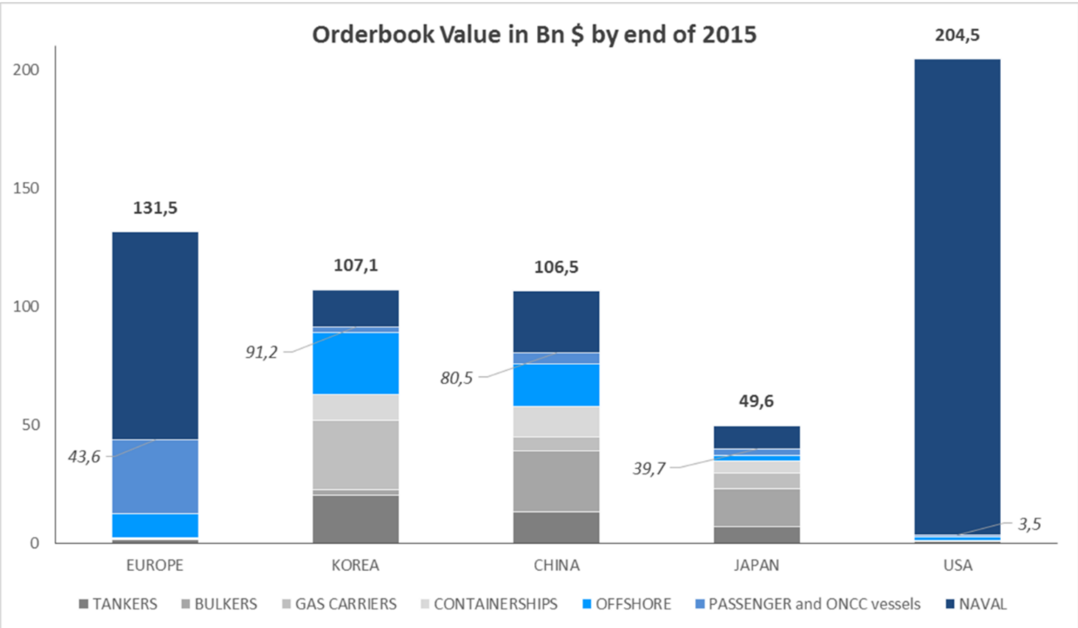
[9] For additional information, see Figures A4 and A5 in the annex.

The global shipbuilding market is very heterogeneous in various aspects. The enterprises work in a diversified market with contracts for shipbuilding, ship repair, naval shipbuilding, boatbuilding and offshore energy constructions. While some big shipyards offer a wide range of products and services, many smaller enterprises reacted to the difficult market situation by offering only highly specific boat types (BALance Technology Consulting, 2014).

Today, the global shipbuilding market is dominated by China, South Korea and Japan with a market share of about 85% in tonnage. According to SEA Europe, the leading market positions of China, South Korea and Japan can be explained by the tonnage and the type of vessels being produced in these countries. Vessels built in China, South Korea and Japan are very large cargo carriers, with ‘lower’ technical requirements and much bigger than the types built in Europe.

Over the past decade, Europe has specialised in high-tech vessels of smaller tonnage. Focus was set on passenger ships such as ferries, cruise-ships and mega-yachts, a market segment in which European shipyards take the global market lead. Further products are fishing vessels with the most advanced technology, along with dredgers, tugs and other workboats or offshore vessels. Figure 2 provides an overview of the order book values, by end of 2015, for Europe, South Korea, China and Japan. It indicates the product diversification of the European shipbuilding industry towards naval, offshore and passenger vessels in comparison with the three Asian shipbuilding nations.

Figure 2: Order book value (USD billion) by region at end of 2015



Source: SEA Europe (2016) (link to publication on SEA Europe website unavailable due to restricted access).

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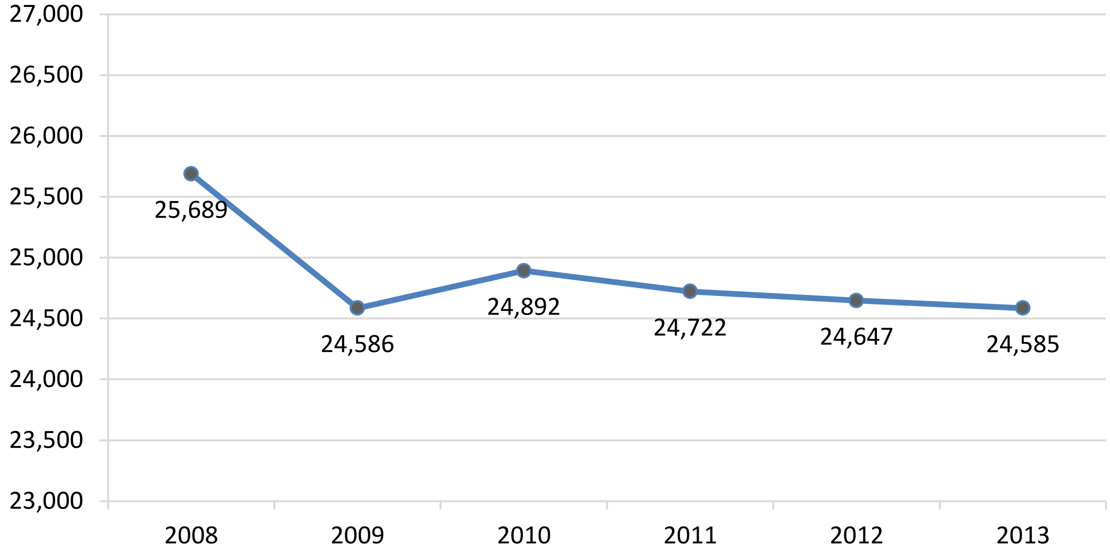
European companies are the world leaders in naval shipbuilding, with an 80% share in the global export order book.

Between 2004 and 2014, the European shipbuilding market faced a dramatic decrease in orders in compensated gross tonnes (CGT) of nearly 40% (Ludwig, 2015). Due to the specialisation of European shipyards and the situation of the global market, it is unlikely that the tonnage levels of 2004 and 2005 will return soon. According to SEA Europe, this trend can be explained by the different vessel types built today and the fact that many of the orders in 2004–2007 responded to speculative aims of some ship-owners.

The number of companies dropped by more than 1,000 due to the 2008 financial crisis but has since stayed more or less stable (Figure 3).

Figure 3: Number of shipbuilding enterprises in EU28, 2008–2013



Note: Data for Croatia included for the whole period.

Source: Eurostat, Structural Business Statistics Data, NACE Rev. 2 Divisions 28.11, 30.11, 30.12 and 33.15.

Furthermore, aggregated European company figures in the shipbuilding sector do not reflect national developments, which – in several countries – have been quite dramatic. In Poland for instance, the bankruptcy of the two biggest shipyards resulted in a dramatic reduction in the total shipbuilding workforce by nearly 75%; similar slumps have occurred in Portugal and Slovakia. Such significant changes are only partly reflected in the national figures on the number of companies and their development between 2008 and 2014, as shown in Table 1. However, countries such as Bulgaria, Greece, Hungary, Italy, Slovakia and Spain have also indicated a quite significant drop in the number of companies between 2008 and 2014. It should be noted here that the decrease (or increase in the case of France) in the number of companies may not always result from a change in the overall production but may also be the effect of corporate restructuring.

Table 1: Number of shipbuilding companies in 2008 and 2014

	Number of companies		Change	Source and comments
	2008	**2014**		
AT	85	93	9.41%	Statistik Austria, STATcube 2015, data for 2013
BE	244	231	-5.33%	Eurostat, Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E), data for 2013
BG	251	186	-25.90%	National Statistical Institute (NSI)
CY	49	64	30.61%	Business Register 2008 and 2014
CZ	347	343	-1.15%	Register of companies of the Czech statistical office (CSO)
DE	1,336	1,383	3.52%	Federal Statistical Office, Company register, data for 2013

	Number of companies		Change	Source and comments
	2008	2014		
DK	291	309	6.19%	Statistics Denmark, Firmastatistikken, special run, data for 2013
EE	135	178	31.85%	Eurostat, Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E); data do not include NACE 28.11 and are for 2013
EL	5,482	3,464	-36.81%	The Hellenic Statistical Authority (ELSTAT), data in each case for the second quarter and include the NACE Rev. 2 Divisions 28.1 (totally), 30.1 (30.11 and 30.12) and 33.1 (totally)
ES	16,545	11,364	-31.31%	Spanish Statistical Office (DIRCE), data include NACE Rev. 2 classes 28.1, 30.1 and 33.1 (data excluding NACE Rev. 2 class 33.1 for 2008: 1,234 and for 2014: 1,001)
FI	671	601	-10.43%	Official Statistics of Finland (OSF): Finnish enterprises
FR	528	941	78.22%	National Institute of Statistics and Economic Studies (INSEE) Enquête annuelle de production dans l'industrie 2008 and 2013 data for 2013, including military shipbuilding
HR	203	259	27.58%	Croatian Bureau of Statistics (NKD) Annual structural business indicators of enterprises according to NKD 2007, for Industry (sections B–E) – breakdown according to size classes by number of people employed, data for 2013
HU	303	217	-28.38%	Hungarian Central Statistical Office (KSH)
IT	4,565	3,486	-23.64%	National Structural Business Statistics (Istat), data for 2013
LT	124	151	21.77%	Eurostat, Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E); only divisions 28.11; 30.11; 30.12; 33.15 are included, data for 2013
LV	146	187	28.08%	Central Statistical Bureau of Latvia (CSP) Yearly survey of enterprises and institutions
MT	74	90	21.62%	National Statistics Office (NSO) ad hoc request
NL	2,065	2,260	9.44%	Central Bureau of Statistics (CBS) Statline, data in each case for fourth quarter and including 1,290 one-person enterprises in 2008 and 1,540 one-person enterprises in 2014
PL	5,368	4,911	-8.51%	The Central Statistical Office (GUS), Statistical yearbook of maritime economy 2010 and 2014 (), pp. 32 and 34, data for 2013
PT	464	378	-18.53%	Statistics Portugal
RO	714	669	-6.30%	National Institute of Statistics in Romania (INSSE) (TEMPO)-Companies' Statistics for 2008 and 2014
SE	1,677	1,699	1.31%	Statistics Sweden (SCB), Statistical Business Register
SI	123	118	-4.07%	Statistical Office of the Republic of Slovenia (SURS)
SK	115	58	-49.57%	Slovak Statistical Office (ŠÚ SR), company register

	Number of companies		Change	Source and comments
	2008	2014		
UK	1,735	1,660	-4.32%	Office for National Statistics (ONS) UK Business: Activity, Size and Location. Data for 2009 and 2014

Note: For more detailed description of company data sources, see national reports.

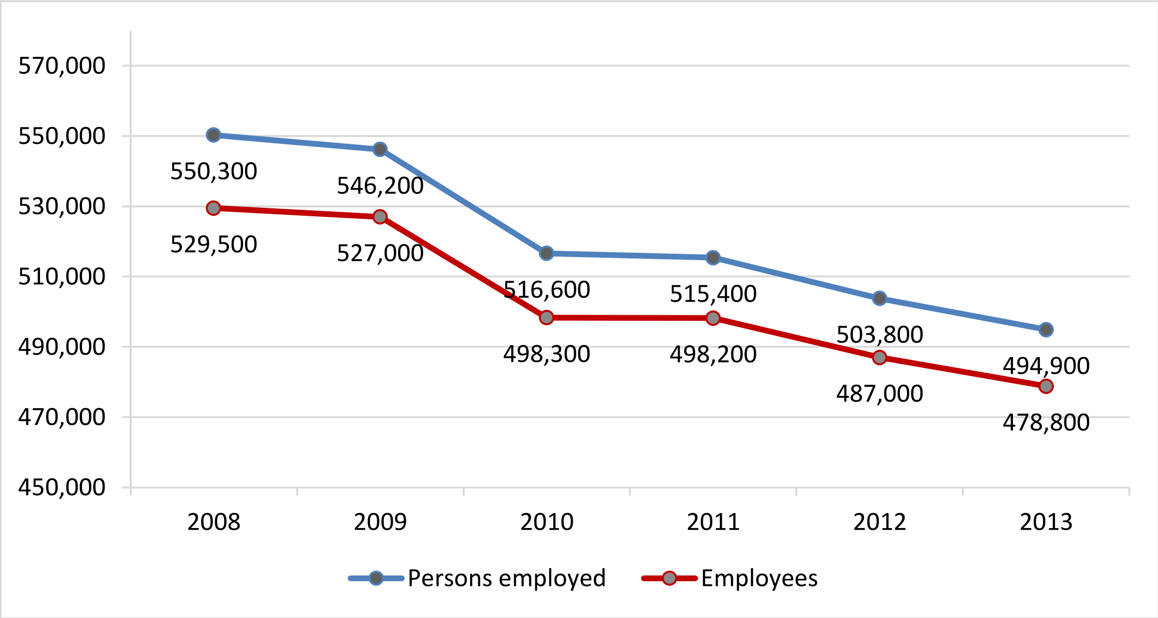
Source: Eurofound's network of European correspondents, 2016

Employment development

According to Eurostat, there were 494,900 employed people working in the four subsectors of the shipbuilding sector in the Member States in 2013 (Figure 4). Compared with the situation before 2008, the decline in the European shipbuilding workforce was significant: the aggregated workforce between 2008 and 2013, according to Eurostat data, decreased by around 10,140 each year (persons employed) and by 10% in total.

Even before 2008, employment in shipbuilding in many Member States had dropped significantly due to restructuring and worsening market conditions. According to a survey carried out for IndustriAll (Ludwig, 2015), the decline in employment in the shipbuilding sector between 2004 and 2015 was about 75% in Poland and Portugal, 50% in Finland, around 40% in Denmark and Spain, 30% in France and around 28% in Germany.

Figure 4: Employment and employees in the shipbuilding sector in EU27/28, 2008–2013



Source: Eurostat, Structural Business Statistics Data, NACE Rev. 2 Divisions 28.11, 30.11, 30.12 and 33.15

Between 2008 and 2014, most Member States also reported a declining workforce in the shipbuilding sector (Table 2). However, the method of gathering data on employment in the shipbuilding sector differs between countries and so any comparative review faces several uncertainties, for example on the absolute number of employees, or on structural characteristics. In several cases, national data gathered by Eurofound national correspondents can also differ from data provided by Eurostat.

The most dramatic reduction of employment – by more than 85% – since 2008, occurred in Belgium and Slovakia (70%), Denmark (60%), and Greece, Latvia and Portugal (around 30%). Only a few countries reported increasing employment. In, for example, Cyprus, the Netherlands, Slovenia and the UK, the number of enterprises either remained stable or increased during the observed period. Also, according to SEA Europe, in the case of Poland, recent employment developments between 2010 and 2013 were positive and increased by 11%.

The role of the shipbuilding sector in overall employment is low and accounts for a share of more than 0.3% in only a few Member States (Table 2). The highest shares in overall employment are reported for Croatia and Finland with shares of 0.7% and 0.8%, respectively.

Table 2 also shows that female employment in the shipbuilding sector is very low, accounting for a share of more than 10% in only a few countries.

As for employment characteristics, it should be noted that, in some countries, the number of employed people differs significantly from the number of employees. While, in general, this results from the inclusion of temporary agency workers and self-employment, authors of the national analyses, in some cases, have highlighted that there has been a significant increase in the number of temporary agency workers, particularly in Poland but also in Italy, the Netherlands and the UK.

Table 2: Employment development since 2008 in the shipbuilding sector

	Employment			Female employment as % of total employment in sector, 2014	Share of sectoral employment as % of total employment in economy, 2014	Source and comments
	2008	2014	Difference			
AT	4,134	2,505	-39.40%	16.01%	0.06	Statistik Austria, STATcube 2015, data for 2013
BE	5,631	1,721	-69.44%	n.a.	0.01%	Eurostat, Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E) and http://www.steunpuntwerk.be/cijfers, data for 2013
BG	8,384	4,943	-41.04%	1.49%	0.2%	NSI
CY	186	429	130.65%	n.a.	0.1%	Business Register, data for 2013
CZ	n.a.	n.a.	n.a.	n.a.	n.a.	CSO does not register data about this very small sector
DE	50,000	34,000	-32.00%	17.65%	0.08%	Federal Statistical Office, data for 2008 in ship and boatbuilding (Wirtschaftszweig WZ (03) 35.1 and for 2014 in ship and boatbuilding) (Wirtschaftszweig WZ (08) 30.1; similar to NACE 30.1)
DK	8,001	2,998	-62.53%	13.58%	0.1%	Statistics Denmark, Labour Force Statistics, special run. Regarding NACE Rev 2, 28.11 only, the Danish equivalent code 28.11.90 is included, because this code excludes engines for windmills, aircraft and motor vehicles, and gives a more precise impression of shipbuilding.

	Employment			Female employment as % of total employment in sector, 2014	Share of sectoral employment as % of total employment in economy, 2014	Source and comments
	2008	2014	Difference			
EE	1,693	1,707	0.83%	n.a.	0.3%	Eurostat Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E); data are for 2013 and cover NACE 30.12 and 33.15
EL	20,812	12,813	-38.43%	5.16%	0.36%	ELSTAT, these data include the NACE Rev 2, Divisions: 28.1 (totally), 30.1 (30.11 and 30.12) and 33.1 (totally); data in each case for the second quarter
ES	n.a.	n.a.	n.a.	n.a.	n.a.	Labour Force Survey, data would include NACE Rev. 2 classes 28, 30 and 33, thus covering activities outside shipbuilding. Due to this limitation, figures are not provided.
FI	12,776	10,552	-17.41%	n.a.	0.7%	OSF 2012 data for Finnish enterprises. , there are breaks in time series and data are not comparable with previous statistical years
FR*	44,142	41,283	-6.48%	20.72%	0.14%	INSEE, Annual Declaration of Social Data (DADS); data for 2013
HR	12,632	10,944	-13.36%	8.00%	0.8%	NKD only those directly employed in shipbuilding are included, not their subcontractors; data for 2013
HU	2,974	1,626	59.32%	n.a.	0.11%	KSH

	Employment			Female employment as % of total employment in sector, 2014	Share of sectoral employment as % of total employment in economy, 2014	Source and comments
	2008	2014	Difference			
IT	64,448	44,697	-30.65%	11.88%	0.2%	Istat, National Structural Business Statistics, data for 2013
LT*	5,758	4,251	-26.17%	n.a.	0.4%	Eurostat, Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E), number of employees: Eurostat, Employees by sex, age and occupation (1,000), data for 2013
LV	3,152	1,902	-39.66%	19.98%	0.3%	CSP Yearly survey of enterprises and institutions
MT	1,602	485	-69.73%	2.68%	0.3%	NSO ad hoc request
NL	16,759	19,151	14.27%	n.a.	0.2%	Eurostat Annual detailed enterprise statistics, CBS Statline, data for 2013
PL	28,342 (2010)	31,508	11.17%- (between 2010 and 2014)	n.a.	0.2%	GUS, Statistical yearbook of maritime economy 2010 and 2014 (data for 2013 and 2010)
PT	8,452	4,917	-41.82%	10.01%	0.1%	Census 2011, data from 2001 instead of 2008 and from 2011 instead of 2014. Note that there was a different classification of economic activities at that time. Thus data refer to building of ships only since the other activities cannot be clearly identified.

	Employment			Female employment as % of total employment in sector, 2014	Share of sectoral employment as % of total employment in economy, 2014	Source and comments
	2008	2014	Difference			
RO*	42,339	32,592	-23.02%	n.a.	0.2%	Eurostat
SE*	9,235	8,827	-4.42%	n.a.	0.2%	SCB, Statistical business register, data for 2013
SI	805	696	-13.54%	10.34%	0.1%	SURS
SK	3,500	500	-85.71%	0%	0.02%	ŠÚ SR LFS, due to low numbers, figures for 2014 are less reliable than for 2008.
UK	71,100	87,200	22.64%	13.30%	0.3%	ONS Labour Force Survey (fourth quarter) (http://ukdataservice.ac.uk/), data for 2009 rather than 2008

*Notes: * Data for these countries (France, Lithuania, Romania, Sweden) on employees instead of employment (including self-employed and temporary agency workers).*

n.a. = not available

Source: Eurofound's network of European correspondents, 2016

National level of interest representation

Measuring representativeness

In most Member States, there are statutory regulations on the representativeness of social partner organisations and they become important when assigning certain rights, such as interest representation, collective bargaining or in the context of public policymaking and social dialogue. Representativeness primarily is measured by the membership strength of the organisations.

For a sectoral study such as this, measuring the membership strength of trade unions and employer organisations also has to take into account how the membership domains relate to the sector. The representativeness of the national social partner organisations is also important for the European umbrella organisations in determining their ability to participate in European social dialogue. Therefore, apart from organisational strength, the role of the national actors in collective bargaining and public policymaking are two other significant important aspects of representativeness.

Thus, representativeness is a multidimensional concept that involves three basic elements:

- the membership domain of social partner organisations and membership strength, measured by organisational density;
- the role of social partner organisations in collective bargaining;
- their role in public policymaking.

As in other Eurofound representativeness studies, the following analysis of national level interest representation in the shipbuilding sector thus focuses on these three aspects.

Membership domain and strength

This study has collected quantitative data on membership and organisational density to assess the strength of the organisation through Eurofound's network of European correspondents along the indicators listed in Table 3.

Table 3: Definition of membership and organisational density

	Membership	Organisational density
Trade unions	• Number of active members in employment • Number of active members in employment in the sector	• Sectoral density: Number of active members in employment in the sector divided by total number of employees in the sector
Employer organisations	• Number of member companies • Number of employees working in member companies • Number of member companies in the sector • Number of employees working in member companies in the sector	• Sectoral density (companies): Number of member companies in the sector divided by the total number of companies in the sector* • Sectoral density (employees): Number of employees working in member companies in the sector divided by total number of employees in the sector

*Note: * Reliable figures on sectoral density in terms of companies cannot be calculated as data on the number of companies provided in this context are not comparable to indications of employer organisations regarding the number of member companies in the sector.*

In the following sections, data are presented on trade unions and employer organisations in relation to:

- domain patterns;
- membership and organisational density;
- collective bargaining;
- participation in public policy.

Domain patterns

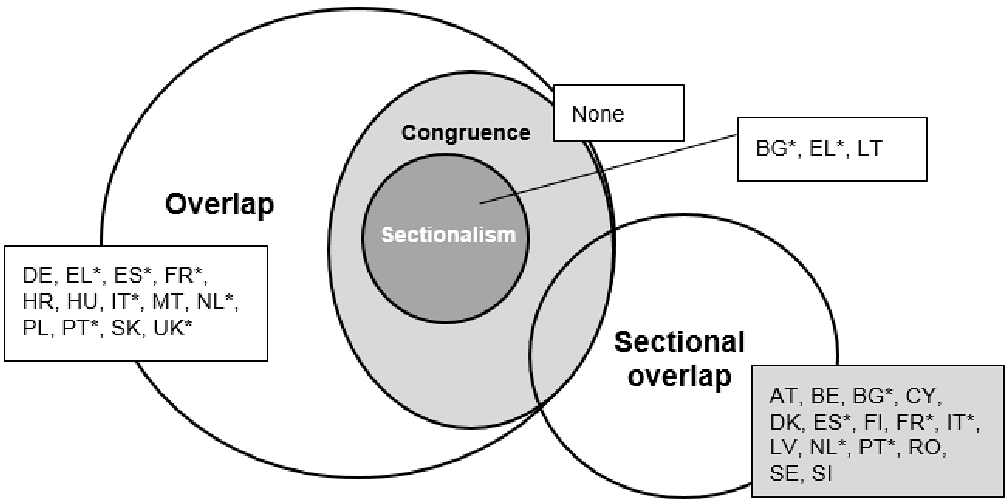
Trade unions

Detailed data and information on employee organisations, membership domains, strength and affiliation to European-level trade unions are presented in Tables A1, A2 and A3 in the annex.

Eurofound's network of European correspondents identified 73 sector-related trade union organisations covering 24 Member States involved in shipbuilding; no sector-related unions were identified in Estonia or the Czech Republic. The names and abbreviations of these trade unions are presented in Table A11 in the annex.

This study shows that the two main domain patterns are overlap and sectional overlap (Table 4). Overall, quite a pluralistic picture emerges with several countries (Bulgaria, France, Greece, Italy, Spain, the Netherlands and Portugal) following a mix of domain patterns as shown in Figures 5 and 6. For a detailed description of trade union domain patterns, see also Table A2 in the annex.

Figure 5: Domain coverage of trade unions in the shipbuilding sector by Member State



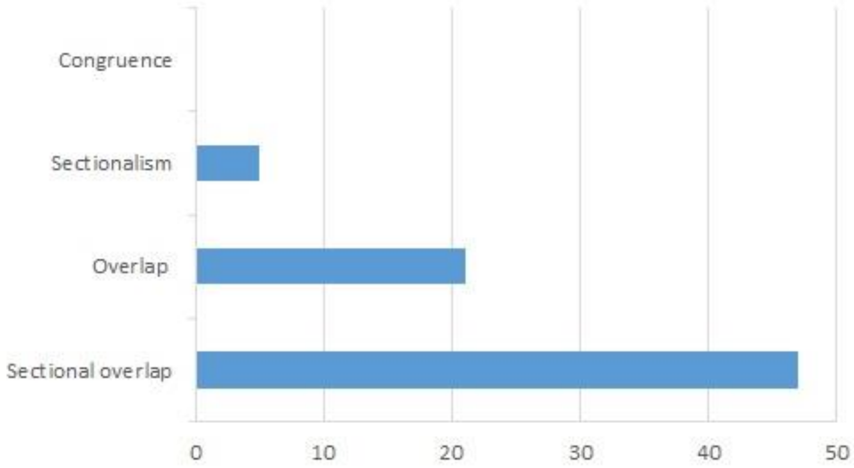
Notes: * Different domain patterns exist in the country.

N = 72 trade union organisations

No information available for CAT in Spain. In the case of CFE-CGC Métallurgie – FCMTM in France, both patterns exist – sectional overlap and overlap. For further details, see Table A2 in the annex.

Source: Eurofound's network of European correspondents 2016.

Figure 6: Domain coverage of trade unions in the shipbuilding sector



Notes: N = 72 trade union organisations

No information available for CAT in Spain. In the case of CFE-CGC Métallurgie – FCMTM in France, both patterns exist – sectional overlap and overlap. This trade union is included in both domain patterns. For details, see Table A2 in the annex.

Source: Eurofound's network of European correspondents, 2016

Table 4: Domain coverage of trade unions in the shipbuilding sector

	Number of trade union organisations	Countries
Sectional overlap	47	AT, BE, BG*, CY, DK, ES*, FI, FR*, IT*, LV, NL*, PT*, RO, SE, SI, UK*
Overlap	21	DE, EL*, ES*, FR*, HU, IT*, MT, NL*, PL, PT*, SK, UK*
Sectionalism	5	BG*, EL*, LT
Congruence	None	None

*Notes: * Different domain patterns exist in the country.*

N = 72 trade union organisations.

No information available for CAT in Spain.

In the case of CFE-CGC Métallurgie – FCMTM in France, both patterns exist – sectional overlap and overlap. This trade union is included in both domain patterns. For details, see Table A2 in the annex.

Source: Eurofound's network of European correspondents, 2016

No trade unions demarcate their domain in a way that is congruent with the shipbuilding sector as defined for this study. Only five trade unions, from Bulgaria, Greece and Lithuania, show domain patterns of sectionalism.

For 65% of the unions, the domain pattern is sectional overlap (47 out 72 trade unions in 16 countries) being the most frequent domain pattern in the shipbuilding sector. Sectional overlap occurs in countries where trade unions represent certain categories of employees (for example, based on employment status or occupation). For shipbuilding, these are the following:

- blue-collar workers – for example Pro-Ge and GHB in Austria, ABVV-FGTB Metaal – FGTB Metallos, ACV-CSC Metea in Belgium, Metalliliitto in Finland and IF Metall, GS and SEKO in Sweden;
- white-collar workers – for example GPA-djp in Austria, Pro-liitto in Finland, CFE-CGC Métallurgie – FCMTM in France, SERS in Portugal and Unionen in Sweden;
- graduate engineers – Sveriges Ingenjörer in Sweden;
- managers and others in leading positions – Ledarna in Sweden.

Moreover, this domain pattern can be found with trade unions representing employees only in one region or specific type of company but not only in the shipbuilding sector. Examples in the framework of this study are:

- two unions in Spain – ELA Industry and Construction, and LAB Sindikatua Industry, representing employees in the Basque region only;
- FEAE-CFDT and CGT FNTE Etat in France representing employees in defence shipbuilding companies in public ownership, or CSIF in Spain organising employees in the public sector.

The domain pattern of overlap exists in 29% of the cases (21 out of 72 trade unions in 12 countries) being the second most important domain pattern in the shipbuilding sector. Overlap occurs where general unions are the most important pattern of union organisation. In various cases, it arises when unions cover (nearly) all sectors of economic activity (GWU in Malta, CNV and FNV in the Netherlands as well as GMB and Unite in the UK). Overlap also results from domain demarcations that include further or adjacent domains in addition to the shipbuilding sector, which are, for example:

- the manufacturing industry (Industria CCOO in Spain and Vasas Szakszervezet in Hungary);
- the metal industry (IG Metal in Germany), the metal and construction sector (MCA-UGT in Spain);
- the energy sector (SINDEL in Portugal);
- electrical workers (SIMA in Portugal).

In most countries with more than one sector-related trade union, sectional overlap is the most common domain pattern (Austria, Belgium, Cyprus, Finland, France, Italy, Portugal, Sweden, Spain and the UK). While, in Austria, sector-related trade unions do not compete because they organise white-collar and blue-collar workers respectively, there are 10 countries where employees in the shipbuilding sector are represented by trade unions with sectional overlapping domains. Patterns include cases where all sector-related trade unions in one country cover the same domain, for example Belgium where two trade unions represent blue-collar workers in the metal sector, or France, where the two trade unions CGT FTM Métallurgie and FO Métaux represent blue-collar and white-collar workers in shipbuilding activities and the entire metal industry.

Employer organisations and business associations

Detailed data and information on employer organisations and corporate actors identified as relevant to this study are presented in Tables A5, A6 and A7 and A8 in the annex.

The structure of sector-related employer organisations in the shipbuilding sector in the European Union differs from the trade union structure. The bottom-up screening carried out in the context of this study identified at total of 49 organisations in 21 Member States as relevant: 45 sector-related employer organisations and four corporate members (companies).

With view to the employer organisations' landscape, one peculiarity of the shipbuilding sector is that employer organisations or trade associations exist in only 20 Member States. No sector-related employer organisations exist in Cyprus, Estonia, Hungary, Latvia and Malta. In total, four companies from three Member States (Port of Antwerp and Promat International from Belgium, Elan from Slovenia and Navantia from Spain) have been identified in this study as relevant sector-related companies, of which three companies are affiliated to SEA Europe.

Domain patterns of sectoral relatedness show certain differences and also similarities to trade unions. While the pattern of sectional overlap is also the most frequent domain pattern of sector-relatedness, followed by overlap, one specific difference, compared with trade unions, are two employer organisations demarcating their domain pattern as congruent (see Figures 7 and 8). A quite dominant domain pattern is overlap. Sectionalism occurs in five employer organisations in four countries (Table 5).

Table 5: Domain coverage of employer organisations in the shipbuilding sector

	Number of employer organisations	Countries
Sectional overlap	29	AT, BG*, CZ, EL, ES*, FI, FR, IT, NL*, PT, RO, SE*, SK, UK*
Overlap	9	BE*, DE*, DK, IT*, LT, NL*, PL, SE*, UK*
Sectionalism	5	BG*, ES*, HR*, IT*
Congruence	2	DE*, HR*

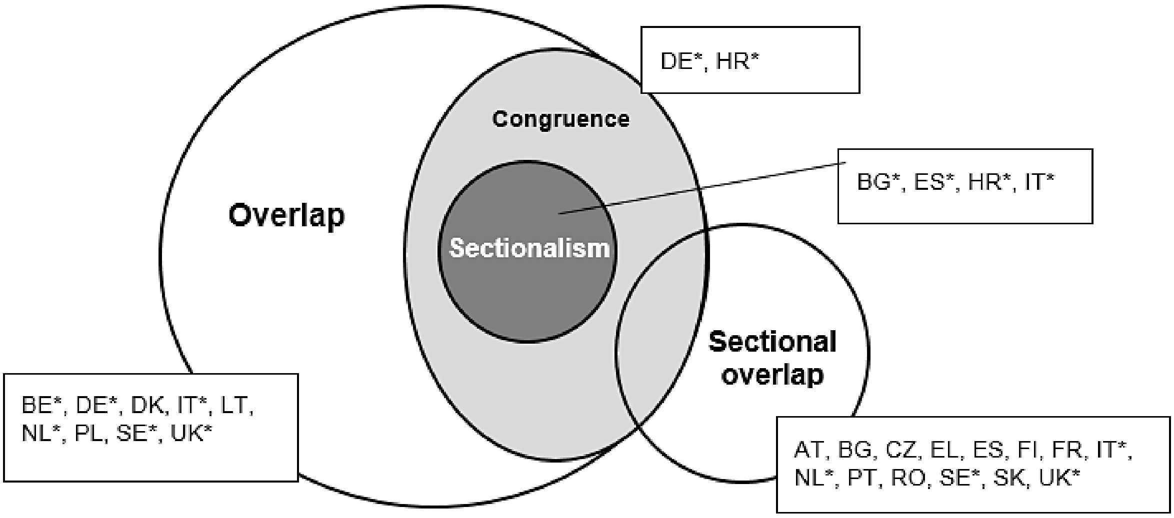
*Notes: * Different domain patterns exist in a country.*

N = 45 employer organisations.

In the case of BULNAS in Bulgaria both patterns exist – sectional overlap and sectionalism. This employer organisation is included in both domain patterns. For details, see Table A5 in the annex.

Source: Eurofound's network of European correspondents, 2016

Figure 7: Domain coverage of employer organisations in the shipbuilding sector (by Member State)

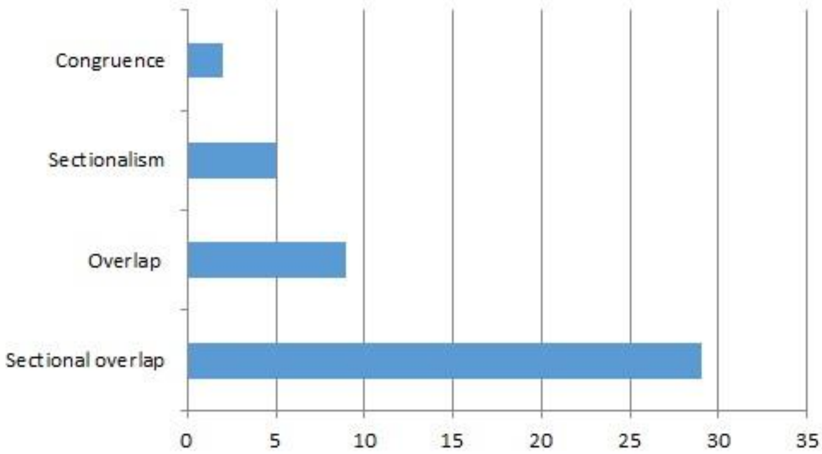


*Notes: * Different domain patterns exist in a country.*

N = 45 employer organisations. For further details, see Table A5 in the annex.

Source: Eurofound's network of European correspondents, 2016

Figure 8: Domain coverage of employer organisations in the shipbuilding sector



*Notes: * Different domain patterns exist in a country.*

N = 45 employer organisations.

In the case of BULNAS in Bulgaria both patterns exist – sectional overlap and sectionalism. This employer organisation is included in both domain patterns. For details, see Table A5 in the annex.

Source: Eurofound's network of European correspondents, 2016.

Sectional overlap occurs with 64% of organisations (29 out of 45 organisations in 14 countries). This mainly results from domain demarcations of employer organisations excluding certain activities or subsectors within the shipbuilding sector and, at the same time, representing companies of additional or adjacent sectors. In Italy, the employer organisations

ANCPL and AGCI Produzione e Lavoro represent only cooperatives falling into the demarcations of the shipbuilding sector, and cooperatives of the construction and manufacturing sector in general. Another group of employer organisations are regionally operating associations, representing companies only in one particular region within their country (for example, BBCMB in Bulgaria operating in Varna and Burgas, ACLUNAGA in Spain from Galicia).

With nine countries, overlap is the second most frequent domain pattern of employer organisations in the shipbuilding sector. Overlap occurs in 20% of the cases (9 out of 45 organisations). This results from the principle of employer associations organising not only companies of the shipbuilding sector but, also, the maritime industry or metalworking sector in general, or different sectors and activities outside shipbuilding. In most cases, these sectors and activities include the metalworking and machinery industries such as Gesamtmetall in Germany or Federmeccanica in Italy or the maritime industry as with Danske Maritime in Denmark.

Sectionalism occurs in four countries – Bulgaria, Croatia, Italy and Spain (in 11% of the cases, 5 out of 45 organisations). In this study's sample, these four relevant employer organisations are from countries where a multiple domain pattern exists. This usually results from the domain demarcation, which excludes some activities or subsectors within the shipbuilding sector. In the case of the Croatian employer organisation UMB, its domain demarcation is sectional as it solely represents small and medium-sized enterprises (SMEs) within shipbuilding.

Two countries have organisations showing a membership domain that is congruent with the sector definition (4% of the cases, 2 out of 45 organisations). The domain of the two employer organisations (VSM in Germany and ZPBO in Croatia) largely focus on the shipbuilding sector as defined for this study. It should be noted however, that both associations are from countries where different domain patterns exist among the organisations.

Membership figures and organisational strength

Trade unions

As mentioned above, this study identified 73 trade union organisations in 24 Member States (no members in the shipbuilding sector could be identified in the Czech Republic or Estonia) related to the shipbuilding sector (for details see Table A1 in the annex). While trade union membership in all organisations identified is voluntary, a dual picture of organisational representation emerges. In 13 Member States, only one or two sector-related trade unions exist whereas, in 11 Member States, at least 3 and up to 10 different trade union organisations represent workers in the shipbuilding sector (Table 6). This illustrates the different patterns and traditions of trade unions' organisational principles, based on sector/industry unionism, blue-collar or white-collar unions, occupational, political, religious or territorial unionism.

Table 6: Number of trade union organisations in the shipbuilding sector per country

Number of trade unions per country	Countries
No sector-related trade union organisation	CZ, EE
1	DE, DK, HR, HU, LV, MT, RO, SL, SK
2	BG, CY, LT, PL
3	AT, BE, EL
4	NL, UK
5 or more	FI (5), PT (5), IT (6), SE (6), ES (7), FR (10)

Note: No sector-related activities in Ireland or Luxembourg.

Source: Authors' own calculation based on Eurofound's network of European correspondents, 2016.

Only one of the 73 trade unions (Vasas in Hungary) is not involved in collective bargaining.

As to estimates regarding organisational density, only 44 organisations provided information on the number of members that are sector-related. Sector-related membership in these organisations ranges from just eight (OVIEK-SEK in Cyprus) to more than 10,000 (15,000 for IG Metall in Germany and 13,300 for Unite in the UK). About 80% of all trade union organisations relevant to this study reported that they have members in the largest companies within the shipbuilding sector (57 out of 73, with information unavailable for 9 cases).

It is difficult to make reliable estimates of sectoral density (calculated as the ratio of the number of members within the sector to the total number of sectoral employees) due to a lack of data – only 31 out of 73 trade union organisations (42%) provided information on sector-related membership figures (see Table A1 in the annex). Based on this information, the following patterns of membership density emerge.

- For 20 out of 31 trade union organisations (65%), the membership density is below 10%.
- For eight trade union organisations (in Bulgaria, Greece, Malta, Poland, Sweden and the UK), the membership density ranges between 10% and 20%.
- Only three trade union organisations report a density of more than 20% (FNV in the Netherlands 21%, the company-based union Elan in Slovenia 24.1% and the German IG Metall with nearly 82%).

Employer organisations and business associations

The majority of organisations in the shipbuilding sector rely on the voluntary membership of their member companies. The only exceptions are Austria and Croatia, where companies are bound to a compulsory membership in their sector-related employer organisation.

As mentioned above, this study identified 45 employer organisations in 20 Member States. In contrast to the trade union organisational patterns, the representation of companies in the shipbuilding sector is more concentrated and hence less fragmented. In 13 Member States, only one or two organisations exist and, except in Italy (where 10 organisations have been identified as sector-related), in all other countries a maximum of three organisations represent companies in the shipbuilding sector (Table 7).

Table 7: Number of employer/business organisations in the shipbuilding sector per country

Number of employer organisations per country	Countries
No sector-related employer organisation	CY, EE, HU, LV, MT, SI
1	BE, CZ, DK, EL, LT, PL, RO, SK, PT
2	AT, BG, DE, UK
3	ES, FI, FR, HR, NL, SE
More	IT (10)

Note: No sector-related activities in Ireland or Luxembourg,

Source: Own calculation based on Eurofound's network of European correspondents, 2016.

Around half of the employer and business organisations were able to provide data on the number of sector-related member companies and the number of employees in these companies (see Table A5 in the annex). Against the differences in domain patterns in those countries where more than one employer organisation in the sector exists, coverage rates in terms of sector-related companies as well as employees in these companies vary quite significantly. Companies' density rates range from high density rates of more than 70% (BIT in Austria, ZPBO in Croatia) to very low rates as in the case of employer organisations that represent very small segments within the sector (as in Italy).

As to density rates in terms of employees covered by sector-related member companies, the picture is similar but also illustrates quite a high organisational density in general (Table 8). Out of 20 employer organisations that provided data on employees in sector-related member companies:

- three (FMMI in Austria, Gesamtmetall in Germany and NMT in the Netherlands) had a density rate of more than 80%;
- four (HBJ in Croatia, Teknologiateollisuus / Meriteollisuus in Finland, GICAN in France and Teknikföretagen in Sweden) had a density rate between 60% and 80%;
- five (ASSONAVE in Italy, LLSRA in Lithuania, Forum Okrętowe in Poland, AIN in Portugal and ZSP SR in Slovakia) had a density rate between 20% and 50%.

Table 8: Density rates of trade union and employer organisations

Membership density in terms of employees	Number of trade unions	Number of employer organisations
<10%	**18** (BG, EL, FR, HR, IT, LT, LV, NL, PL, SE, SK, UK)	**5** (FI, HR, IT, SE)
10% to < 20%	**7** (BG, EL, MT, PL, PT, SE)	**1** (FI)
20% to 60%	**2** (NL, SI)	**6** (HR, IT, LT, PL, PT, SK)
60% to < 80%	**0**	**4** (FI, FR, HR, SE)
80% to 100%	**1** (DE)	**1** (HR)
90% to 100%	**0**	**3** (AT, DE, NL)
100%	**0**	**0**
n.a.	**44**	**26**

Notes: Multiple density rates per Member State are possible.
N = 28 for trade unions; N = 20 for employer organisations
Source: Eurofound's network of European correspondents, 2016.

Collective bargaining

Almost all sector-related trade unions identified in this study are involved in collective bargaining. The only exception is Vasas in Hungary, which shows no involvement in sector-related collective bargaining because the Hungarian shipbuilding sector is generally characterised by very small companies. Tables A4, A9 and A10 in the annex list all the social partners engaged in sector-related collective bargaining.

In the case of employer organisations, their involvement in collective bargaining clearly differs from trade unions in the sector. Out of the 45 sector-related employer organisations identified in this study, only 26 are directly involved in collective bargaining. Some 18 organisations are either not involved in collective bargaining or only indirectly involved as members of national or sectoral umbrella organisations that negotiate collective agreements for the entire sector or country. This occurs, for example, for Danske Maritime in Denmark, GICAN in France or AIN in Portugal. Circumstances in the case of Gesamtmetall are specific, as the organisation is a sectoral umbrella organisation itself and, as such, not directly involved in sector-related collective bargaining. However, its regional association Nordmetall participates directly in collective bargaining with trade unions in the shipbuilding sector.

As for the four companies and corporate member organisations of SEA Europe, only two are directly involved in collective bargaining: Elan in Slovenia and Navantia in Spain.

Collective bargaining practices and its actors

Multiemployer bargaining (MEB), compared with single-employer bargaining (SEB), is of relevance when describing collective bargaining practices. Multiemployer bargaining is defined as being conducted by an employer organisation on behalf of several companies in a sector. In the case of SEB, the company is the signatory party to the agreement.

As shown in Table 9 on the involvement of trade union organisations and their countries of origin in different forms of bargaining, MEB is carried out by trade unions in various EU

Member States. In addition to the northern Member States of Denmark, Finland and Sweden, trade unions in southern Member States such as Greece and Portugal are involved in MEB at intersectoral, cross-sectoral or occupational level. As to SEB, trade unions in 13 Member States are involved in bargaining at the company level only. The participation of trade unions in both MEB and SEB is found in seven countries (Belgium, Bulgaria, Germany, France, Italy, the Netherlands and Spain)

Table 9: Collective bargaining and bargaining levels of trade unions in shipbuilding sector in Member States

Form/level of bargaining	Trade union organisations by country
MEB	AT, DK, EL, FI, PT*, SE, SK
MEB and SEB	BE, BG, DE, ES, FR, IT, NL
SEB	BG, CY, EL, ES, FR, HR, LT, LV, MT, PL, PT, RO, SI, UK
No collective bargaining	HU

*Notes: *In Portugal, the trade union SIMA is involved in collective bargaining. There is no information on the form of collective bargaining available.*

Different forms of collective bargaining are possible within one Member State.

From the 73 trade unions identified, only one – Vasas in Hungary –- is not involved in sector-related collective bargaining.

No sector-related trade union in the Czech Republic or Estonia.

Source: Eurofound's network of European correspondents, 2016

From the 73 relevant trade unions identified in this study, 72 (99%) are directly involved in collective bargaining:

- 24 (33%) report participation in MEB;
- 25 (34%) show participation in MEB and SEB;
- 21 (29%) are involved in SEB only (no information on the form of collective bargaining for SIMA in Portugal).

Among the employer organisations, 58% (26 of 45) are directly involved in collective bargaining. Table 10 shows that:

- 14 organisations in seven Member States have the capacity or competence to conduct collective agreements at multiemployer, intersectoral, sectoral or branch level;
- one organisation (LLSRA from Lithuania) is only involved in SEB;
- 11 organisations from Belgium, Bulgaria and Italy participate in MEB and SEB;
- 14 organisations are not involved in sector-related collective bargaining,;
- four organisations in Denmark, France and Portugal are indirectly involved in collective bargaining via their sectoral umbrella organisations;
- in Germany, the two organisations either have an advisory capacity in sectoral collective bargaining as in the case of VSM, or have member organisations at regional level (Nordmetall) directly participating in collective bargaining, as in the case of Gesamtmetall;
- the employer organisation ANCONAV in Romania is involved in collective bargaining but no information on the form of collective bargaining is available.

As stated earlier, three corporate members of the sector-related European social partner organisation SEA Europe and one additional company from Slovenia have been identified for this study and show participation in sector-related collective bargaining (no information was available for Port of Antwerp and Promat International in Belgium). The companies Navantia in Spain and Elan d.o.o. in Slovenia are involved in SEB.

Table 10: Collective bargaining practices of employer organisations in the shipbuilding sector in Member States

Form / level of bargaining	Employer organisations by country
MEB	AT, DK, FI, FR, NL, SE, SK
MEB and SEB	BE, BG*, IT
SEB	LT
Not directly involved in sector-related collective bargaining, only via their sectoral umbrella organisation	FR (GICAN), DK (Danske Maritime), PT (AIN)
Not involved in sector-related collective bargaining	BG, CZ, DE, EL, ES, HR, IT, NL, PL, UK

Note: More than one organisation exists within one country with different patterns of collective bargaining involvement.

Source: Eurofound's network of European correspondents, 2016

Collective bargaining coverage

Traditionally, collective bargaining coverage is high in the shipbuilding sector. In the previous representativeness study on the shipbuilding industry, in 2006, most countries where data were available showed high coverage rates of 90%–100% (Rochet, 2006). As of 2016, information is available for 19 of the 23 Member States (Table 11) with no information for Cyprus, Latvia, Portugal or Romania) and confirming this pattern of high bargaining coverage.

- In seven countries (Austria, Belgium, Croatia, Finland, France, Italy and the Netherlands), 100% of the workforce in the shipbuilding sector is covered by their respective collective agreements.
- Four countries (Denmark, Germany, Spain and Sweden) record bargaining coverage rates of between 80% and 99%.
- Two countries (Lithuania and the UK) reach around 40%, with three countries (Bulgaria, Slovakia and Slovenia) reaching between 20% and 30%.
- The lowest collective bargaining coverage rates, between 10% and 17%, occur in Greece, Malta and Poland.

Very high bargaining coverage rates of over 90% are reported in countries with a strong practice of collective bargaining and a dominance of MEB, as in the northern European countries Denmark and Finland, the continental western European countries such as Austria, Belgium, Germany and the Netherlands, and the southern European countries France, Italy and Spain. The only exceptions are Croatia, with exclusive SEB, and France which has both MEB and SEB. Countries with relatively low bargaining coverage rates (below 40%), however, have exclusively SEB (Bulgaria, Greece, Lithuania, Malta, Poland, Slovakia and Slovenia). Collective bargaining extension schemes exist in nine countries, resulting in coverage rates of 80% to 100%, with the only exception being Slovenia, where extension mechanisms are very rare.

Table 11: Extension of collective agreements and bargaining rates in the shipbuilding sector in Member States

	Extensions	Collective bargaining coverage rate (% of total employees in the sector)
AT	No	100%
BE	Yes	100%
BG	No	28.9%
CY	No	n.a.
DE	No	99%
DK	No	90%
EL	No	17% (estimated)
ES	Yes	90%
FI	Yes	100%
FR	Yes	100%
HR	No	100%
IT	Yes	100%
LT	No	40%
LV	No	n.a.
NL	Yes	100%
MT	No	13.6%
PL	No	10%
PT	Yes	n.a.
RO	No	n.a.
SE	Yes	80%
SI	Yes**	24%
SK	No	20%
UK	No	42%***

*Notes: *There is only one company with a collective agreement in Cyprus.*

*** Extension occurs only rarely in Slovenia.*

**** According to national correspondent this rate is not reliable.*

n.a. = not available

There is no sector-related collective bargaining in the Czech Republic, Estonia or Hungary.

Source: Eurofound's network of European correspondents, 2016

Participation in public policy

Apart from the sector-relatedness, organisational and membership strength of social partners and their active involvement in collective bargaining processes, the participation in public policy is an important indicator of the representativeness of national social partner organisations.

Here, not only the participation in tripartite or bipartite consultation (either on a regular or ad hoc basis) is relevant but also the existence of bipartite or tripartite bodies and institutions that have been established in the shipbuilding sector.

Tripartite and bipartite consultation

This study shows that, in 19 Member States, at least one trade union related to the shipbuilding sector is consulted in sector-related matters by public authorities. This is also the case for employer organisations in 16 countries.

As for individual organisations, only about half (58%) of all sector-related trade union organisations (42 out of 73 organisations) and 56% of all employer organisations analysed in this study (25 out of 45 organisations) participate in public policies.

As shown in Table 12, in most cases, public authorities consult trade unions only on an ad hoc basis (30 trade unions), while for employer organisations consultation on a regular basis prevails (15 employer organisations). Employer organisations are consulted only on an ad hoc basis in nine cases.

Eight employer organisations are not consulted on sector-related matters by public authorities from the following countries; Croatia, Finland, Germany, Greece and Sweden, and neither are eight employee organisations from; Bulgaria, Croatia, Cyprus, Finland, Slovenia and Spain.

As mentioned above, there are 15 countries with more than one sector-related trade union. In Greece, Italy, Lithuania, the Netherlands (no information available for De Unie), Poland and the UK all of the relevant trade union organisations participate in public policies either on a regular or on an ad hoc basis. In Portugal, at least one union is consulted (no data for the other trade unions are available). In Cyprus, none of the trade unions is consulted by public authorities (no information for Austria or Belgium).

As to employer organisations, 11 countries have more than one sector-related organisation. While no information is available for several organisations, public authorities regularly consult employer organisations on sector-relevant matters in Portugal (AIN)[19] and the UK (SSA and SMI). Among the 10 employer organisations identified in Italy, five are consulted on an ad hoc or regular basis while, for the other five organisations, no information is available. In Bulgaria, Croatia, Finland, France, Germany, the Netherlands, Spain and Sweden, at least one organisation is involved in public consultation.

In addition to consulting trade unions and employer organisations, public authorities also consult sectoral companies in Belgium and Lithuania.

[19] In the case of Portugal, AIN's umbrella organisation FENAME is also publically consulted.

Table 9: Participation of trade unions and employer organisations in public policies

Consultation practice and participation pattern	Trade union organisations	Employer organisations
Social partners involved in consultation on a regular basis	IG Metall (DE), Pro-liitto, Metalliliitto, Puuliitto (FI), FEAE-CFDT, CFE-CGC Métallurgie – FCMTM, Union CGT FTM Métallurgie, FO Métaux (FR), UILM (IT)*, NSZZ Solidarność, WZPGM (PL), OZ Kovo (SK)	APL (CZ), VSM (DE)*, ACLUNAGA (ES), GICAN, UIMM (FR), HBJ (HR), ANCPL, AGCI Produzione e Lavoro (IT), FME*, NMT (NL), Forum Okrętowe (PL), AIN (PT), ANCONAV (RO), ZSP SR (SK), SMI (UK)
Social partners involved in consultation on an ad hoc basis	Podkrepa SFMM (BG), CO-industri DK), P.O.E.M., SENE, Somatio Ergazomenon Nafpigion Skaramaga 'Triaina' (EL), Industria CCOO, LAB Sindikatua Industry (ES), FGMM-CFDT, CGT FNTE Etat (FR), Vasas Szakszervezet (HU), Feneal Uil, Filca Cisl, Fillea Cgil, UILM, FIM, FIOM (IT), VLGTDPS, KLRDPS (LT), ŪTAF (LV), GWU (MT), CNV, FNV, VHP2 (NL), SIMA (PT), SLNavalistul (RO), IF Metall, GS, Sveriges Ingenjörer (SE), Prospect, Unite (UK)	BBCMB (BG), Danske Maritime (DK), PYMAR** (ES), Teknologiateollisuus / Meriteollisuus, Veneteollisuuden työnantajat (FI), Federlegno, ASSONAVE, Federmeccanica (IT), LLSRA (LT), SSA (UK)
No consultation	Syndicate 'Korabostroitel' – Varna (BG), OVIEK-SEK, SEMMHK-PEO (CY), CSIF (ES), Sähköliitto, TEAM (FI), SMH (HR), Ledarna, Unionen (SE), Trade union Elan (SI)	Gesamtmetall (DE), HEMEXPO (EL), Kemianteollisuus (FI), UMB, ZPBO (HR), Teknikföretagen, IKEM, TMF (SE)
No consultation as no sector-related organisation exist	EE, CZ	CY, EE, HU, LV, MT, SI
No information available	GPA-djp, PRO-GE, GBH (AT), ABVV-FGTB Metaal – FGTB Metallos, ACV-CSC Metea, ACLVB-CGSLB (BE), MCA-UGT, ELA Industry and Construction, CAT (ES), FCE-CFDT, FNIC CGT, FO Construction, Fédération BATI-MAT-TP CFTC (FR), De Unie (NL), SINDEL, FETESE, SQTD, SERS (PT), SEKO (SE), GMB, UCATT (UK)	FMMI, BIT (AT), Agoria (BE), BULNAS (BG), The Basque Maritime Forum (ES), FIN (FR), Confcooperative – Federlavoro e servizi, CNA Produzione, CLAAI, CONFIMI Impresa meccanica, CONFIMI Impresa Legno (IT), Metaalunie (NL)

*Notes: * In the case of UILM in Italy, VSM in Germany and FME in the Netherlands, the organisations are consulted regularly and on an ad hoc basis.*

*** In the case of PYMAR in Spain there is no information available about the consultation pattern, it is only known that they are consulted.*

For further details, see Tables A4, A9 and A10 in the annex.

Source: Eurofound's network of European correspondents, 2016

Bodies dealing with sector-specific public policies

There are eight Member States in which social partners in the shipbuilding sector are actively involved in bodies dealing with sector-specific public policies. Important topics and areas addressed by joint bodies are:

- occupational health and safety;
- social security;
- forecasts of employment and skills;
- training;
- working conditions.

The bodies identified in the Netherlands are either bipartite pension funds or a fund for education and training in the shipbuilding sector.

Table 13 shows that, in total, there are 21 different bipartite or tripartite bodies: six in Italy, three each in Bulgaria, France and the Netherlands, two each in Slovakia and Spain, and one each in Poland and the UK; further details are given in Table A14 in the annex.

While the joint bodies in Bulgaria, France, Poland, Slovakia and Spain are tripartite in nature, the bodies in Italy and the Netherlands are bipartite. The legal basis of these bodies is either a statute or an agreement between the parties.

In Poland, all sector-related trade unions and employer organisations named in this study are involved, as well as other organisations, in the tripartite body for the shipbuilding industry.

The Dutch pension fund Pensioenfonds van de Metalektro (PME) and the fund for education and training Stichting Arbeidsmarkt en Opleiding in de Metalektro (A+O) represent the four sector-related trade unions, which were identified for the scope of this study. On the employers' side, only one organisation is involved in these bodies.

In Italy, almost all sector-related trade unions named in this study (with the exception of FIOM) are represented in one of the five bipartite bodies dealing with shipbuilding matters. As for the National Paritarian Committee for the Stone and Furniture Industries, the three unions Feneal Uil, Filca Cisl and Fillea Cgil, and the employer organisation Federlegno, are represented. These organisations mainly represent employees and companies in the stone and woodworking sector. As for the National Paritarian Observatory on the Metalworking Industry in Italy, the unions FIM and UILM, and the employer organisation Federmeccanica – all as organisations representing the metal sector – are involved.

In the case of the Slovakian tripartite body, the Economic and Social Council, the sector-related trade unions and employer organisations identified in this study are represented by their respective umbrella organisations.

As for Bulgaria, France, Spain and the UK, only some of the trade unions and employer organisations are represented in the respective bipartite and tripartite bodies.

Table 13: Bodies dealing with sector-specific public policies, 2016

	Name of the body	Character	Origin
BG	• Sectoral Council for Tripartite Cooperation in Machinery construction – for example, Shipbuilding, Ministry of Economy • Sectoral Council for Tripartite Cooperation on Healthy and Safe Working Conditions, Ministry of Economy • Sectoral Council for Tripartite Cooperation on Labour and Social Security Relations, Ministry of Economy	Tripartite	Statutory
ES	• Clúster Marítimo Español	Bipartite	Agreement
	• Social Dialogue Board of the region of Galicia	Tripartite	Agreement
FR	• Comité Stratégique Filière Navale	Tripartite	Statutory
	• Commission Paritaire Nationale de l'Emploi de la Métallurgie	Bipartite	Statutory and agreement
	• Observatoire Prospectif et Analytique des Métiers et Qualifications de la Métallurgie (employment and skills forecasts)	Bipartite	Agreement
IT	• Comitato Paritetico Nazionale Lapidei e Arredamento (CPNLA) • Stone and furniture industries, National Paritarian Committee • San.Arti – Supplementary Healthcare Fund for Workers in the Craft Sector • Organismo Bilaterale Nazionale – National Paritarian Institution • Osservatorio Paritetico Nazionale Sull'industria Metalmeccanica – National Paritarian Observatory on Metalworking Industry • Osservatorio Nazionale Per La Cooperazione – National Observatory for the Cooperation	Bipartite	Agreement
NL	• Pensioenfonds van de Metalektro (PME), pension fund • Stichting Arbeidsmarkt en Opleiding in de Metalektro (A+O), fund for education and training • Pensioenfonds Metaal en Techniek (PMT), pension fund	Bipartite	Agreement
PL	• Zespół Trójstronny ds. Przemysłu Stoczniowego – Scope: working out joint statements in relation to issues important for State policy and the interests of employees and employers within the sector	Tripartite	
SK	• Economic and Social Council (HSR) – all relevant issues on employment, working conditions and social policy	Tripartite	Statutory
	• Industry Bipartite: Public policy issues on the industry, including shipbuilding	Bipartite	Agreement
UK	• Science, Engineering, Manufacturing and Technologies Alliance (SEMTA) – skills and training	Tripartite	Statutory

Note: For further details, see Table A14 in the annex.
Source: Eurofound's network of European correspondents, 2016

European level of interest representation

Overview

At European level, eligibility for consultation and participation in social dialogue are linked to three criteria defined under Article 1 of the European Commission's Communication on 'Adapting and promoting social dialogue at community level' (European Commission, 1998). Accordingly, a social partner organisation must:

- relate to a specific sector or categories and be organised at European level;
- consist of organisations which are themselves an integral part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States;
- have adequate structures to ensure their effective participation in the Committees.

Regarding social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements.

Accordingly, this section on the European associations in the shipbuilding sector will analyse:

- the membership domains of these organisations;
- the composition of their membership;
- their capacity to negotiate.

As mentioned above, at European level there are two sector-related European associations: industriAll on the employees' side and SEA Europe on the employers' side. Both associations are listed by the European Commission as social partner organisations consulted under Article 154 of the TFEU and both participate in the sector's European Social Dialogue Committee for the shipbuilding sector, which was established in 2003, as the first formal social dialogue platform at European level in the metal sector. The main aims are to:

- maintain the profitability of the sector;
- guarantee prospects for the European shipbuilding industry;
- maintain a high level of good quality jobs.

The following analysis concentrates first on industriAll and other relevant European-level trade unions before providing information on SEA Europe and other employer and business organisations.

Membership domains and composition

Trade unions

As stated on its website, industriAll represents 177 national trade unions across supply chains in manufacturing, mining and energy sectors across Europe from 38 countries, including all EU Member States, representing 6.9 million workers. IndustriAll was founded in 2012, when the European Metalworker's Federation(EMF), the European Mine, Chemical and Energy Workers' Federation (EMCEF) and the European Trade Union Federation for Textiles (ETUF:TCL) merged.

Some 42 out of the 73 trade unions (58%) that have been identified as related to the shipbuilding sector are affiliated to industriAll (for further details see Table A3 in the annex). In this context, however, 14 out of the total number of trade unions are not affiliated to any European organisation with no information available for a further five organisations. Thus, if the total number of 54 sector-related trade unions with a European affiliation only, were taken into account, the share of industriAll would be 78%.

As can be seen from Table 14, of the 26 Member States that have been identified as relevant for this study, there are sector-related trade unions which also have members in the shipbuilding sector in 24 Member States while, in two Member States (the Czech Republic and Estonia), sector-relevant trade union organisations have not been identified. According to Eurofound's network of European correspondents, industriAll has sector-related affiliates in 19 of the 24 Member States (79%).

In almost all Member States where there are trade unions in the shipbuilding sector, collective bargaining takes place either at single-employer level or sectoral level (23 out of 24). Apart from Cyprus, Latvia, Lithuania and Romania, all countries where trade unions are involved in collective bargaining are also covered by industriAll. The trade union organisations in Cyprus and Romania are not affiliated to any European trade union organisation.

There is information on the consultation of trade unions by public authorities in the context of sector-related matters for 22 countries (no information is available for Austria or Belgium). This study's analysis shows that, in three countries (Croatia, Cyprus and Slovenia), no trade union organisation is consulted by public authorities while, in the remaining 19 Member States, at least one trade union organisation is consulted. IndustriAll covers 15 (83%) of these Member States.

Table 14: European affiliation of sector-relevant trade unions in the shipbuilding sector

European-level affiliation	26 Member States*	Countries	Trade union organisations
Sector-related trade unions	**24**	AT, BE, BG, CY, DE, DK, EL, ES, FI, FR, HR, HU, IT, LT, LV, MT, NL, PL, PT, RO, SE, SI, SK, UK	**73**
Number affiliated to industriAll	19 (79%)	AT, BE, BG, DE, DK, EL, ES, FI, FR, HR, HU, IT, MT, NL, PL, PT, SE, SK, UK	42 (58%)
Trade unions involved in collective bargaining	**23**	AT, BE, BG, CY, DE, DK, EL, ES, FI, FR, HR, IT, LT, LV, MT, NL, PL, PT, RO, SE, SI, SK, UK	**72**
Number affiliated to industriAll	18 (78%)	AT, BE, BG, DE, DK, EL, ES, FI, FR, HR, IT, MT, NL, PL, PT, SE, SK, UK	41 (57%)
Trade unions consulted by public authorities	**19**	BG, DE, DK, EL, ES, FI, FR, HU, IT, LT, LV, MT, NL, PL, PT, RO, SE, SK, UK	**42**
Number affiliated to industriAll	16 (84%)	BG, DE, DK, EL, ES, FI, FR, HU, IT, MT, NL, PL, PT, SE, SK, UK	26 (62%)

*Notes: * There are no sector-related activities in Ireland and Luxembourg.*

No relevant sector-related (having members in the sector) trade unions were identified for the Czech Republic and Estonia.

For further details, see Tables A3 and A4 in the annex.

Source: Eurofound's network of European correspondents, 2016

Table 15 provides an overview of the 42 affiliates of industriAll identified as relevant to the shipbuilding sector.

Table 15: List of trade unions affiliated to IndustriAll Europe

Country	Name	Collective bargaining pattern	Consultation by public authorities	Number of members in the sector
AT	GPA-djp	MEB	n.a.	n.a.
	PRO-GE	MEB	n.a.	n.a.
BE	ABVV-FGTB Metaal – FGTB Metallos	MEB, SEB	n.a.	n.a.
	ACV-CSC Metea	MEB, SEB	n.a.	n.a.
	ACLVB-CGSLB	MEB, SEB	n.a.	n.a.
BG	Podkrepa SFMM	MEB, SEB	Yes	95
DE	IG Metall	MEB, SEB	Yes	15,560
DK	CO-industri	MEB	Yes	n.a.
EL	P.O.E.M.	MEB	Yes	~1,500
ES	Industria CCOO	MEB, SEB	Yes	4,730
	MCA-UGT	MEB, SEB	n.a.	n.a.
	ELA Industry and Construction	MEB, SEB	n.a.	n.a.
FI	Sähköliitto	MEB	No	~680
	Pro-liitto	MEB	Yes	~2,000
	Metalliliitto	MEB	Yes	~2,500
	TEAM	MEB	No	~400
FR	FGMM-CFDT	MEB, SEB	Yes	n.a.
	FEAE-CFDT	SEB	Yes	1,950
	FCE-CFDT	MEB, SEB	n.a.	n.a.
	CFE-CGC Métallurgie – FCMTM	MEB, SEB	Yes	n.a.
	CGT FNTE Etat	SEB	Yes	2,000
	Union CGT FTM Métallurgie	MEB, SEB	Yes	n.a.
	FNIC CGT	MEB, SEB	n.a.	n.a.
	FO Métaux	MEB, SEB	Yes	n.a.
HR	SMH	SEB	No	6,000
HU	Vasas Szakszervezet	No sector-related collective bargaining	Yes	n.a.
IT	UILM	MEB, SEB	Yes	3,500
	FIM	MEB, SEB	Yes	n.a.
	FIOM	MEB, SEB	Yes	n.a.

Country	Name	Collective bargaining pattern	Consultation by public authorities	Number of members in the sector
MT	GWU	SEB	Yes	44
NL	CNV	MEB	Yes	1,500
	De Unie	MEB	n.a.	n.a.
	FNV	MEB	Yes	3,630
PL	NSZZ Solidarność	SEB	Yes	3,870
PT	SIMA	SEB	Yes	652
	SINDEL	MEB	n.a.	n.a.
SE	Sveriges Ingenjörer	MEB	Yes	n.a.
	IF Metall	MEB	Yes	1,100
	Unionen	MEB	No	1,658
SK	OZ Kovo	MEB	YES	~30
UK	GMB	SEB	n.a.	~5,000
	Unite	SEB	Yes	13,000

Notes: N = 73 trade union organisations in 26 Member States (no sector-related activities in Ireland and Luxembourg).

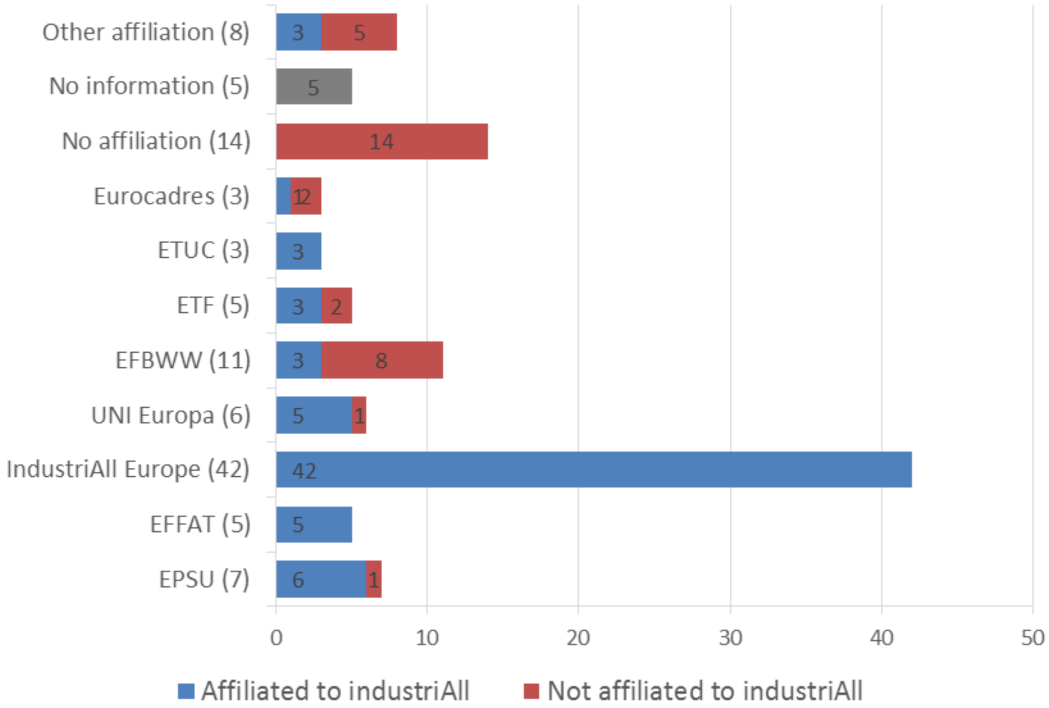
For further details on number of total members and members in the sector, see Table A1 in the annex.

For further details on union affiliations and collective bargaining and consultation, see Tables A3 and A4 in the annex.

Source: Eurofound's network of European correspondents, 2016

Besides industriAll, this analysis identified seven other European-level organisations with at least three national affiliates relevant to the shipbuilding sector, including the cross-sector European Trade Union Confederation (ETUC). The most relevant of these organisations is the European Federation of Building and Woodworkers (EFBWW) with 11 national affiliates in 6 countries (Austria, Finland, France, Italy, Sweden and the UK). The other European-level trade union organisations and their number of national affiliates identified as sector-related are summarised in Figure 9.

Figure 9: European affiliation of trade union organisations



Notes: Total number of affiliates per European organisation or category in brackets.

N = 73 trade union organisations in 26 EU Member States.

No information available for five trade unions.

For further details, see Table A3 in the annex.

EFFAT = European Federation of Food, Agriculture and Tourism Trade Unions; ETF = European Transport Federation; EPSU = European Federation of Public Service Unions

Source: Eurofound's network of European correspondents, 2016

As for European-level trade union federations not participating currently in the European Sectoral Social Dialogue Committee (ESSDC) in the shipbuilding sector, it should be noted that only ETF covers one Member State (Latvia) by a national affiliate that is not already covered by industriAll. All other European-level organisations are organising members in specific professions or occupational groups and in Member States where at least one further union organisation is affiliated to industriAll.

It is clear that, from the perspective of organisational affiliation as well as the coverage of countries, industriAll is by far the most important European-level trade union organisation in the shipbuilding sector.

Table 16 lists those trade unions in the sector not affiliated to industriAll Europe.

Table 10: List of trade unions not affiliated to industriAll Europe

Country	Name	Collective bargaining pattern	Consultation by public authorities	Number of members in the sector	Affiliation
AT	GBH	MEB	n.a.	n.a.	EFBWW
BG	Syndicate 'Korabostroitel' – Varna	SEB	No	680	none
CY	OVIEK-SEK	SEB	No	8	none
	SEMMHK-PEO	SEB	No	12	none
EL	SENE	SEB	Yes	~400	none
	Somatio Ergazomenon Nafpigion Skaramaga 'Triaina'	SEB	Yes	~800	none
ES	CSIF	SEB	No	n.a.	none
	Industria-CIG	MEB, SEB	Yes	n.a.	none
	LAB Sindikatua Industry	MEB, SEB	Yes	n.a.	none
	CAT	SEB	n.a.	n.a.	n.a.
FI	Puuliitto	MEB	Yes	500	none
FR	FO Construction	MEB, SEB	n.a.	n.a.	EFBWW
	Fédération BATI-MAT-TP CFTC	MEB, SEB	n.a.	n.a.	EFBWW
IT	Feneal Uil	MEB, SEB	Yes	n.a.	EFBWW
	Filca Cisl	MEB, SEB	Yes	n.a.	EFBWW
	Fillea Cgil	MEB, SEB	Yes	n.a.	EFBWW
LT	VLGTDPS	SEB	Yes	650	none
	KLRDPS	SEB	Yes	n.a.	none
LV	ŪTAF	SEB	Yes	39	ETF
NL	VHP2	MEB, SEB	Yes	250	Eurocadres
PL	WZPGM	SEB	Yes	1,250	none
PT	FETESE	MEB	n.a.	n.a.	n.a.
	SQTD	MEB	n.a.	n.a.	n.a.
	SERS	MEB	n.a.	n.a.	n.a.
RO	SLNavalistul	SEB	Yes	2,400	n.a.
SE	Ledarna	MEB	No	268	CEC, FECCIA
	GS	MEB	Yes	n.a.	EFBWW, NFBWW
	SEKO	MEB	n.a.	~300	none
SI	Trade union Elan	SEB	No	150	n.a.

Country	Name	Collective bargaining pattern	Consultation by public authorities	Number of members in the sector	Affiliation
UK	Prospect	SEB	Yes	3,500	Eurocadres, EPSU, ETF, UNI Europa
	UCATT	SEB	n.a.	700+	EFBWW

Notes: N = 73 trade union organisations in 26 Member States.

For further details on number of total members and members in the sector, see Table A1 in the annex.

For further details on union affiliations and on collective bargaining and consultation, see Tables A3 and A4 in the annex.

Source: Eurofound's network of European correspondents, 2016

Employer organisations

SEA Europe promotes and supports European business enterprises that are involved in the design, construction, maintenance and repair of all types of ships and other relevant maritime structures, including the complete supply chain of systems, equipment and services. According to its website, it represents 23 national associations across 18 countries in Europe, of which 16 are Member States.

SEA Europe was established in 2012 when its predecessor, the Community of European Shipyards Associations (CESA) and the European Marine Equipment Council (EMEC) merged.

In the context of this study, 45 employer organisations covering 20 Member States and 4 relevant sector-related companies from 3 countries have been identified and analysed. Some 20 employer organisations, covering 15 Member States, plus 3 corporate members covering one additional country (Belgium)[21] are affiliated to SEA Europe. This means that 44% of all national sector-related employer organisations and 75% of sector-related companies are affiliated to SEA Europe. It should be noted that eight employer organisations in the shipbuilding sector are not affiliated to any European-level organisation. If SEA Europe affiliates were counted on this basis, its share would be 54%.

In contrast to trade union organisations, employer organisations in the shipbuilding sector are much less involved in collective bargaining. According to SEA Europe, this is because collective bargaining in the sector is traditionally carried out at company level. There are only 12 out of 20 Member States, where relevant employer organisations are involved in collective bargaining. According to Eurofound's network of European correspondents, 26 of 45 identified employer organisations are involved in collective bargaining. Nevertheless, this does not mean that employees in other countries/organisations are not covered by collective bargaining. In many cases, collective agreements covering the shipbuilding sector are concluded at a higher level, for example, metalworking (see notes in Table 17 for typical situations). However, the direct involvement of SEA Europe affiliates in collective bargaining is very low – only three affiliates in three countries (Finland, Lithuania and Romania) have reported being engaged in collective bargaining (25% of countries and 11% of organisations). This low involvement in collective bargaining, which contrasts quite strongly to the practice

[21] A representative of SEA Europe referred to the fact that there is no national employer association in Belgium covering shipbuilding. The membership domain of the employer organisation identified in this study's bottom-up screening (Agoria) is much broader.

of trade unions, indicates the character of SEA Europe as a business interest organisation rather than an employer organisation.

However, employer organisations are regularly consulted by public authorities on sector-related matters. Consultation is reported by 25 employer organisations out of a total of 45, in 16 out of 20 countries. The share of SEA Europe affiliates is strong – 81% for countries – and a 60% share of the total number of employer organisations consulted.

Table 17 presents an overview of the European affiliation of sector-relevant employer organisations.

Table 11: European affiliation of sector-relevant employer organisations in the shipbuilding sector

European-level affiliation	26 Member States*	Countries	Employer organisations
Sector-related employer organisations	**20**	AT, BE, BG, CZ, DE, DK, EL, ES, FI, FR, HR, IT, LT, NL, PL, PT, RO, SE, SK, UK	**45***
Number represented by SEA Europe	15 (75%)	BG, DE, DK, EL, ES, FI, FR, HR, IT, LT, NL, PL, PT, RO, UK	20 (44%)
Employer organisations involved in collective bargaining	**12****	AT, BE, BG, FI, FR, IT, LT, NL, PT, RO, SE, SK	**26**
Number represented by SEA Europe	3 (25%)	FI, LT, RO	3 (11%)
Employer organisations consulted by public authorities	**16**	BG, CZ, DE, DK, ES, FI, FR, HR, IT, LT, NL, PL, PT, RO, SK, UK	**25**
Number represented by SEA Europe	13 (81%)	DE, DK, ES, FI, FR, HR, IT, LT, NL, PL, PT, RO, UK	15 (60%)

*Notes: * There are no sector-related activities in Ireland and Luxembourg. No relevant sector-related (having members in the sector) trade unions were identified for the Czech Republic and Estonia.*

*** In Denmark and Germany as well as France and Portugal employer organisations in the shipbuilding sector are not directly engaged in collective bargaining but indirectly via the sectoral employer organisations in the metalworking sector.*

For further details, see Table A8 in the annex.

Source: Eurofound's network of European correspondents, 2016

Table 18 lists all 20 sector-related employer organisations identified by this study as affiliated to SEA Europe.

With a few exceptions, all employer organisations cover the whole country. The Bulgarian organisation represents only companies in the regions of Varna and Burgas; the Spanish employer organisations ACLUNAGA and The Basque Maritime Forum are active only in the Galician region, with the latter one representing companies only within the Basque region.

Table 18: List of employer organisations affiliated to SEA Europe

Country	Name of affiliate	Collective bargaining pattern	Consultation by public authorities	Number of member companies in the sector
BG	BULNAS	Not involved	n.a.	n.a.
DE	VSM	Not involved in collective bargaining**	Yes	140 (160 as of 08.2016)
DK	Danske Maritime	Not involved in collective bargaining ***	Yes	72
EL	HEMEXPO	Not involved	No	n.a.
ES	PYMAR	Not involved	Yes	26
	ACLUNAGA	Not involved	Yes	85
	The Basque Maritime Forum	Not involved	n.a.	n.a.
FI	Teknologiateollisuus / Meriteollisuus*	MEB	Yes	31
FR	GICAN	Not involved****	Yes	163
HR	HBJ	Not involved	Yes	4
	UMB	Not involved	No	150
	ZPBO	Not involved	No	200
IT	ASSONAVE	Not involved	Yes	30
LT	LLSRA	SEB	Yes	14 (2015)
NL	NMT	Not involved	Yes	421
PL	Forum Okrętowe	Not involved	Yes	62 on 31.12.2015*******
PT	AIN	Not involved*****	Yes	343 (2014)
RO	ANCONAV	Engaged in collective bargaining******	Yes	52
UK	SSA	Not involved	Yes	n.a.
	SMI	Not involved	Yes	n.a.

*Notes: * Affiliated to SEA Europe via Finnish Marine Industries.*

*** VSM is not involved in collective bargaining; only in an advisory capacity.*

**** Not directly involved, only via its umbrella organisation Danish Industry (DI).*

***** GICAN is a member of UIMM which negotiates CA.*

****** AIN forms together with ENAME the umbrella organisation FENAME, which is directly involved in collective bargaining for the shipbuilding sector in PT.*

******* No information of form of collective bargaining available.*

******** According to the national correspondent of Eurofound in Poland, the number of member companies in the sector as of November 2015 was 49. SEA*

Europe provided the more recent number – 62 members as of 31 December 2015.

For further details, see Tables A5, A8 and A9 in the annex.

Source: Eurofound's network of European correspondents 2016.

Table 19 provides an overview of the three corporate members of SEA Europe.

Table 19: List of corporate members of SEA Europe

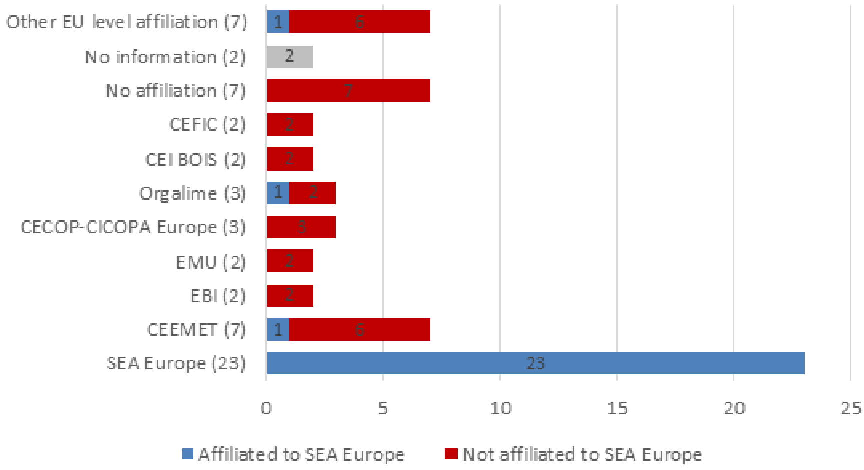
Country	Name of corporate member	Collective bargaining	Consultation
BE	Port of Antwerp	Not involved	Yes
	Promat International	Not involved	No
ES	Navantia	SEB	n.a.

Note: For further details, see Tables A8 and A10 in the annex.

Source: Eurofound's network of European correspondents 2016.

As proof of the weight of SEA Europe as the relevant European-level employer organisation in the ESSDC, it is worth comparing the affiliation of national organisations with other European organisations. Based on a bottom-up approach, the affiliation of national employer organisations and companies to relevant organisations of European-level interest representation was analysed and is summarised in Figure 10.

Figure 10: European affiliations of employer organisations and corporate members



Notes: Total number of affiliates per European organisation or category in brackets.

N = 49 employer organisations and companies in 26 Member States.

For further details, see Table A8 in the annex.

CECOP-CICOPA Europe = European Confederation of Cooperatives Active in Industry and Services

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

EBI = European Boating Industry

EMU = European Metal Union

Source: Eurofound's network of European correspondents, 2016

The screening of European-level affiliation confirms this study's analysis that SEA Europe has by far the largest number of national affiliates (20 out of 45 employer organisations and three out of four corporate members). Whereas eight employer organisations have no affiliation at all to a European-level organisation and no information is available for one national organisation or the corporate member, there are 17 employer organisations (87%) that are affiliated to European-level organisations other than SEA Europe.

The following European-level employer organisationsrepresent more than two national employer organisations or corporate members in the shipbuilding sector.[27]

- CEEMET represents seven employer organisations (BBCMB in Bulgaria, Teknologiateollisuus / Meriteollisuus in Finland, UIMM in France, Gesamtmetall in Germany, Federmeccanica in Italy, FME in the Netherlands and Teknikföretagen in Sweden).

[27] According to SEA Europe, the European associations mentioned here are not shipbuilder associations and therefore do not cover the sector specifically. They have a broader remit, as in the case of CEEMET or EBI, which represents the intererests of the European leisure marine industry and its members.

- CECOP-CICOPA Europe represents three Italian employer organisations (AGCI Produzione e Lavoro, ANCPL and Confcooperative – Federlavoro e servizi).
- The European Engineering Industries Association (Orgalime) represents three employer organisations (Teknologiateollisuus / Meriteollisuus in Finland, FME in the Netherlands and Teknikföretagen in Sweden).

Table 20 lists all sector-related employer organisations not affiliated to SEA Europe.

Table 20: List of employer organisations not affiliated to SEA Europe

Country	Name of employer organisation	Collective bargaining pattern	Consultation by public authorities	Number of member companies in the sector	European-level affiliation
AT	FMMI	MEB	n.a.	<10	none
	BIT	MEB	n.a.	72	none
BE	Agoria	MEB, SEB	n.a.	n.a.	n.a.
BG	BBCMB	MEB, SEB	Yes	3	CEEMET
CZ	APL	Not involved	Yes	65	EBI
DE	Gesamtmetall	Not involved	No	100	CEEMET
FI	Kemianteollisuus	MEB	No	1	Cefic
	Veneteollisuuden työnantajat	MEB	Yes	15	none
FR	UIMM	MEB [2]	Yes	n.a.	CEEMET
	FIN	MEB	n.a.	n.a.	European Boating Industry
IT	Federlegno	MEB, SEB	Yes	n.a.	CEI-Bois, European furniture industries confederation
	Federmeccanica	MEB, SEB	Yes	n.a.	CEEMET
	ANCPL	MEB, SEB	Yes	2	CECOP-CICOPA
	AGCI Produzione e Lavoro	MEB, SEB	Yes	n.a.	CECOP-CICOPA
	Confcooperative – Federlavoro e servizi	MEB, SEB	n.a.	n.a.	CECOP-CICOPA
	CNA Produzione	MEB, SEB	n.a.	n.a.	UEAPME, EMU
	CLAAI	MEB, SEB	n.a.	n.a.	none
	CONFIMI Impresa meccanica	MEB, SEB	n.a.	n.a.	none
	CONFIMI Impresa Legno	MEB, SEB	n.a.	n.a.	none
NL	FME	MEB	Yes	n.a.	CEEMET, Orgalime

Country	Name of employer organisation	Collective bargaining pattern	Consultation by public authorities	Number of member companies in the sector	European-level affiliation
	Metaalunie	MEB	n.a.	170	European Metal Union
PT	AIN *	MEB	Yes	343 (2014)	none
SE	Teknikföretagen	MEB	No	33	CEEMET, ORGALIME
	IKEM	MEB	No	~ 6–7 (2015)	ECEG, Cefic, EUPC, Fecc
	TMF	MEB	No	~20 (2015)	CEI-Bois
SK	ZSP SR	MEB	Yes	1 (2015)	none

*Notes: * AIN forms, together with ENEME, the umbrella organisation FENAME, which is involved in collective bargaining. FENAME had 1,000 total members and 14 member companies in the sector, as of 2014.*

For further details, see Table A8 in the annex.

Source: Eurofound's network of European correspondents, 2016

As for covering additional countries, CEEMET covers one country (Sweden) not already represented by SEA Europe and six additional employer organisations.

Orgalime covers one additional country (Sweden), but only two more employer organisations. CECOP-CICOPA Europe covers three more employer organisations, all from Italy, where another employer organisation is already affiliated to SEA Europe.

Four other European-level organisations, Cefic, CEI-Bois, EMU and EBI have two national affiliates each. However, they would add only two additional countries that are currently not covered by SEA Europe (the Czech Republic through EBI, Sweden through CEI-Bois and Cefic).

Nevertheless, it is evident that, in terms of the number of national affiliates and countries covered, SEA Europe is by far the most important European-level employer organisation in the shipbuilding sector.

Capacity to negotiate

The third criterion of representativeness at European level refers to an organisation's capacity to negotiate on behalf of its members and the existence of adequate structures and resources to participate in European social dialogue. The European sectoral social partners should be able to prove their capacity to negotiate on behalf of their members and to enter into 'contractual relations, including agreements' provided for in Article 155 of the TFEU. The sole negotiating of other types of joint texts such as joint opinions, frameworks of action and guidelines are considered as sufficient in this context.

A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate according to a given procedure. The mandate/mandating procedure can be either statutory, that is, laid down in the statutes (constitution) of the organisation or annexed to them, or non-statutory, that is, laid down in secondary (formal) documents, such as rules of procedures, memoranda of understanding or decisions by the governing bodies of the organisation.

It can be considered that this condition is not fulfilled if neither a statutory nor a non-statutory mandating procedure can be identified.

To check this criterion, the two European social partners from the shipbuilding sector were asked to provide proof of their statutes or any other written documentation describing their mandate and capacity to negotiate, as well as the ratification procedures in place.

The following analysis is based on the statutes of industriAll (industriAll, 2012) and the Statutes of SEA Europe (SEA Europe, 2012). A SEA Europe representative also provided further information and clarification regarding the mandating and negotiation procedure in written form for this study.

IndustriAll’s capacity to negotiate

The statutes of industriAll provide a clear and strong mandate for negotiations at cross-sectoral, sectoral and even company level (such as the European Works Council). Appendix II of the statutes clarify the ‘mandate procedure for negotiations’, including procedures on internal decision-making, the delegation of negotiators, information and consultation with affiliates, rules about adopting an agreement as well as implementation procedures. There are also rules and procedures in case negotiations fail and no agreement is achieved.

The statutes also define clear rules and procedures for company-level agreements on basic conditions:

> *EWC have no mandate to negotiate collectively. This remains solely the responsibility of trade unions. The affiliates involved in the company can give the industriAll European Trade Union a mandate to undertake negotiations on behalf of and with participation from the organisations involved in the company in question.*

Furthermore, mandating procedures, negotiation rules and the adoption of agreements as well as their implementation are clarified in the statutes.

SEA Europe’s capacity to negotiate

SEA Europe’s legal statutes do not explicitly refer to a mandate/mandating procedure to negotiate agreements as provided for in Article 155 of the TFEU. The objectives of the organisation as defined in Article 1 of the statutes include no reference to negotiations of agreements but focus more on the objectives of promoting and supporting maritime industries and their national member organisations. Furthermore, SEA Europe, in the context of the ESSDC on shipbuilding, has negotiated and concluded joint statements with industriAll, such as the joint review of the framework on state aid to shipbuilding (CESA and EMF, 2010), the 2016 joint statement on social standards (SEA Europe and industriAll, 2016c) and the joint position statement on the implementation of LeaderSHIP (SEA Europe and industriAll, 2016b).

According to SEA Europe, the mandate to carry out such initiatives and negotiate joint texts in the context of the European sectoral social dialogue is not based on the statutes or other procedural documents but is based on internal procedures. Here, the SEA Europe secretariat reports on its daily activities to the Directors’ Committee and the Board of SEA Europe to obtain prior approval.

Thus, SEA Europe’s mandate to negotiate is non-statutory and rests on internal procedures and habitual practice.

However, there are also areas where SEA Europe has gained a more formal mandate to act on behalf of its national members. It has established thematic working groups, where member associations as well as companies participate to look at specific topics. One of the working groups is related to human capital. This group has a mandate to take decisions on behalf of the members, which is reflected in the working group’s terms of reference.

Procedures and outcomes of the ESSDC in the shipbuilding sector

IndustriAll and SEA Europe (as the successor organisation of CESA) have, since 2003, been involved in the ESSDC in the shipbuilding sector; the first Sectoral Social Dialogue Committee in the metalworking sector.

Its activities have not only resulted in a number of joint statements and positions as mentioned above but are also based on the objectives and rules of procedure adopted at the inaugural meeting of ESSDC in 2003 that include the possibility to conclude European-level agreements (ESSDC, 2003). It states that the 'social partners may decide to embody the results of their dialogue into a European framework agreement'. This indicates that the social dialogue committee foresees the possibility of negotiations and thus could be regarded as a non-statutory mandate or 'ad hoc procedure' for negotiations.

Conclusions

Although European shipbuilding companies have been under increased pressure from competitors in other parts of the world, there still are about 300 shipyards in Europe, directly employing, in 2015, a workforce of around 220,000 employees in the EU Member States.[28] Activities in the shipbuilding sector are concentrated in around 10 Member States that report having a workforce of more than 10,000 employees, with the largest workforces concentrated in France, Germany, Italy, Poland and the UK. (Ireland and Luxembourg have no noteworthy activities in the sector and thus are not included in this study).

Well before the global economic and financial crisis in 2008, the shipbuilding sector had experienced intensive restructuring and reorganisation because of globalisation and the need to manage cyclical change. Against the background of its important role as a technology-intensive sector and its link to national interests (defence and trade), the shipbuilding sector in many Member States as well as at European level has been addressed by active industrial policy initiatives (such as the LeaderSHIP 2020 initiative) that are characterised by strong and active involvement of the social partner organisations.

This study, which covers 26 Member States (leaving aside Ireland and Luxembourg), has identified a total of 122 sector-related social partner organisations of which 73 are trade unions, 45 employer/business organisations and 4 individual companies.

The bottom-up analysis and the national landscape of industrial relations and representation of employees and companies in the sector show that, for trade unions and employer organisations, the two dominant domain patterns are sectional overlap and overlap. There are, however, differences between employee and employer organisations in regard to other features of industrial relations. Organisational patterns show that the trade union landscape is more pluralist than in the case of employer organisations. In nearly half of the Member States where sector-related trade unions exist, there are more than two union organisations in the sector. In Finland, Italy, Portugal, Italy, Spain and Sweden, between five and seven national trade unions are related to the shipbuilding sector (often to smaller segments or specific occupations) and, in the case of France, this study identified as many as ten trade union organisations. However, the screening of national trade union organisations was not able to identify any sector-related trade union organisations with members in the shipbuilding sector in the Czech Republic or Estonia.

As for coverage, this study shows that sector-related employer organisations exist only in 20 Member States – with none in Cyprus, Estonia, Hungary, Latvia, Malta or Slovenia.

Looking at organisational density, only 44 trade unions and about half of the employer organisations were able to provide data on members in the shipbuilding sector. However, the data indicate that, in the case of trade unions and especially for employer organisations, organisational density is quite strong. The overall strong presence of social partner organisations in the shipbuilding sector is also confirmed by the incidence of collective bargaining. In more than half of the Member States identified as relevant for this study, collective bargaining takes place both at multiemployer and single-employer level, with Hungary identified as the only country where no collective bargaining practice exists at either level.

In contrast to trade unions, the sector-related employer organisations are much less directly involved in collective bargaining; this indicates that collective agreements often have a sectoral scope that may be narrower (for example, woodworking) or broader (metalworking).

Resulting from the strong presence of trade unions and employer organisations and MEB, shipbuilding also displays high levels of bargaining coverage in terms of employees and companies. In seven countries, 100% of all employees in the sector are covered by the respective sectoral agreements. High bargaining rates of between 80% and 100% exist in four

[28] Source: SEA Europe.

other countries. These high coverage rates are noteworthy, as collective agreements are declared generally binding in only a minority of countries, according to the principle of extending them 'towards all others'.

A similar pattern can be seen on the consultation of social partners by public authorities, trade unions and employer organisations in the shipbuilding sector: 58% of trade unions and 56% of the employer organisations are consulted by public authorities on sector-related matters either regularly, or on an ad hoc basis. Employer organisations are much more likely than trade unions to be consulted regularly. This study identified eight Member States (Bulgaria, France, Italy, the Netherlands, Poland, Slovakia, Spain and the UK) where there are bipartite and/or tripartite sector-specific bodies.

The top-down analysis of the two sectoral European social partners organisations involved in the ESSDC on shipbuilding has shown that, in comparison with other European-level trade unions and employer federations, industriAll and SEA Europe are the most important actors in terms of the number of national affiliates, as well as countries covered.

IndustriAll has 42 direct national affiliations (58% of all the trade unions are identified as sector-related). In terms of country coverage, industriAll has sector-related affiliates in 19 out of the 24 Member States (79%) where sector-related trade unions have been identified.

All but one of the industriAll affiliates are involved in sector-related collective bargaining and industriAll national affiliates are engaged in collective bargaining in 19 out of 23 Member States where trade unions are involved in collective bargaining either at sector or single enterprise level (83%).

The analysis of the 31 national trade union organisations not affiliated to industriAll shows that a total of seven other European-level organisations have more than one national affiliate linked to the shipbuilding sector. Of these, the building and woodworking federation EFBWW (11 affiliations) and the service sector federations EPSU (7) and UNI Europa (6) are the most relevant. However, none of those other organisations would extend the coverage in terms of Member States. It should also be noted here that among the 31national trade union organisations, by far the largest group (totalling 14) is constituted by 'non-affiliation' (45%), not being affiliated to any European-level trade union federation.

As to SEA Europe, this study's analysis shows that the organisation has 20 affiliated employer organisations (44%) among the sector-relevant employer organisations and three corporate members out of those four (75%) that have been identified in the context of this study. As regards geographical coverage, SEA Europe covers 15 Member States by national affiliates and one further Member State by its corporate member in Belgium.

Eight employer organisations and the corporate member do not have any affiliation to European-level organisations; no information is available for one national organisation. There are 17 employer organisations (38%) organisations affiliated to European-level organisations other than SEA Europe. The most important of those is CEEMET, the employer organisation in the metal, engineering and technology-based industries with seven sector-related national affiliates. The second most important European association besides SEA Europe is the European employer association in the engineering sector Orgalime (three), the European confederation of cooperatives CECOP-CICOPA (three) and CEI-Bois, EMU, EBI and Cefic (two national affiliates each)

However, there are only two countries covered by other European-level employer organisation but not by SEA Europe. These countries are the Czech Republic (EBI) and Sweden (covered by CEEMET and Orgalime).[32]

Looking at collective bargaining patterns, this study shows that the overwhelming majority of national members of SEA Europe are not directly involved in collective bargaining; there are

[32] According to SEA Europe, there is only minor sector-related economic activity in these two countries.

only two countries (Finland and Lithuania) where this is reported. This illustrates first the character of SEA Europe as a business association rather than an employer organisation and, secondly, a pattern of collective bargaining that is taking place in a broader sectoral scope (such as metalworking, engineering or woodworking). This assessment is also confirmed by the result that most of those employer organisations that are not affiliated to SEA Europe report an involvement in collective bargaining.

As for the final aspect of this representativeness study, the capacity to negotiate, this study's analysis of the statutes, procedures and previous activities in this regard showed that industriAll has a clear and strong statutory mandate and respective rules and procedures to negotiate on behalf of its members, including agreements under Article 155 of the TFEU.

In contrast, SEA Europe has no statutory mandate for negotiations on behalf of its members but has handled negotiations and the respective mandates on the basis of internal procedures and habitual practices that can be regarded as a non-statutory mandate. This assessment is also confirmed by the fact that, in the context of the ESSDC, the two organisations, since 2003, have concluded a number of joint statements and positions. Furthermore, the written objectives and rules of procedures of the ESSDC foresee the possibility to negotiate European-level framework agreements.

Against this, both the bottom-up and the top-down screening and analyses of the shipbuilding sector in the 26 Member States revealed that industriAll and SEA Europe are the most representative European-level social partner organisations in the sector.

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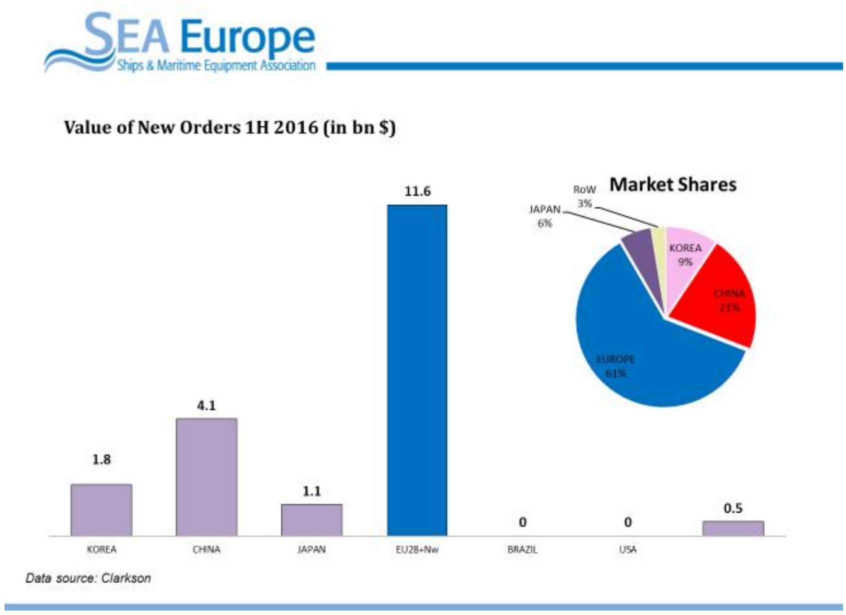
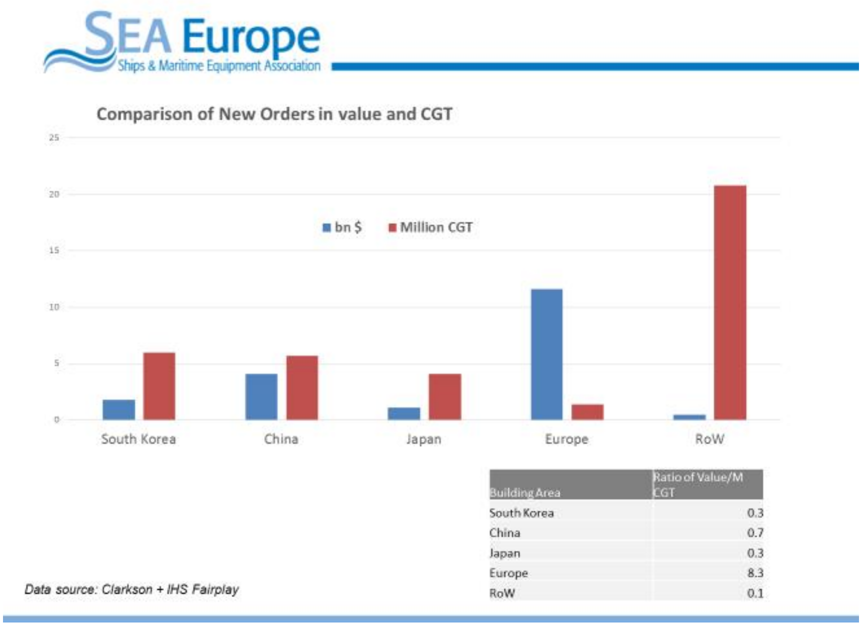
Annex: Additional information

Figure A1: Value of new orders in the first half of 2016 (USD billion)



Source: Clarkson

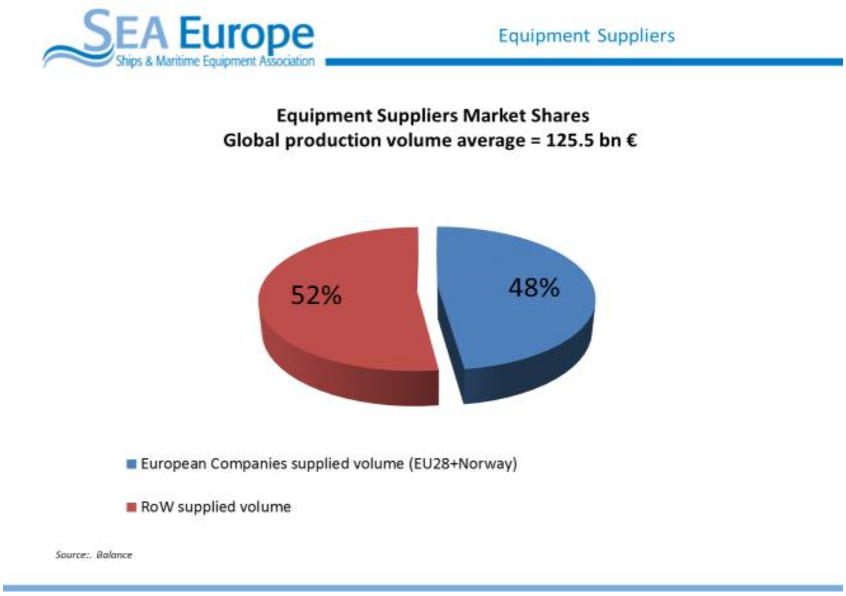
Figure A2: Comparison of new orders in value and CGT



Building Area	Ratio of Value/M CGT
South Korea	0.3
China	0.7
Japan	0.3
Europe	8.3
RoW	0.1

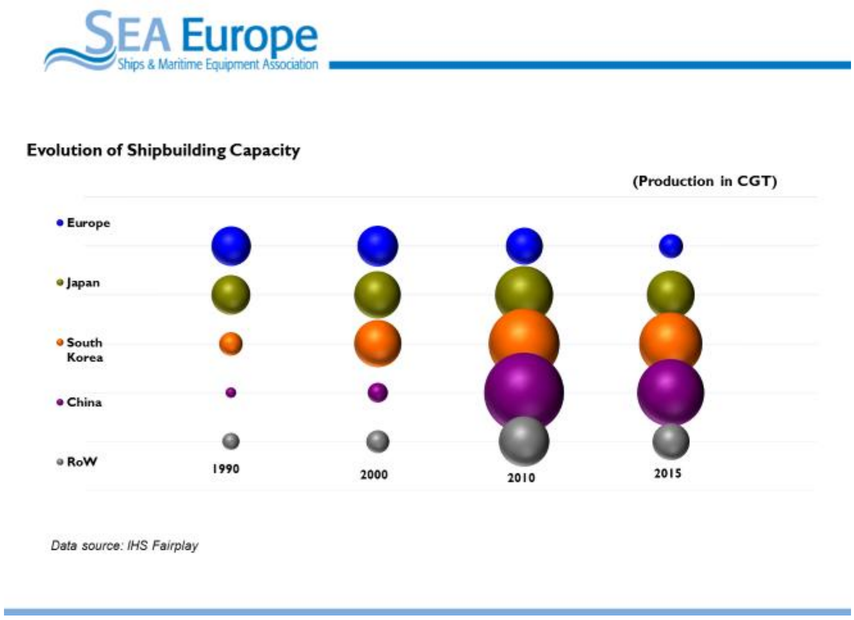
Source: Clarkson and IHS Fairplay

Figure A3: Market shares of equipment suppliers (global production volume average = €125.5 billion)



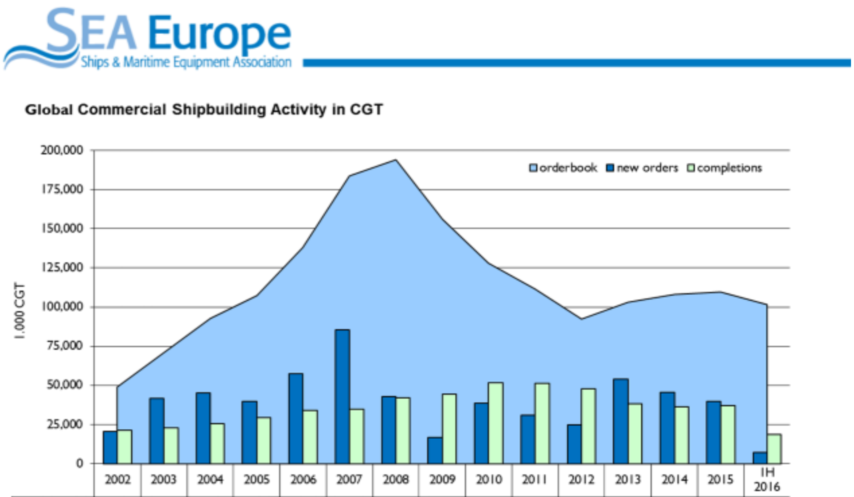
Source: BALance Technology Corporation (2014)

Figure A4: Evolution of shipbuilding capacity (in CGT)



Source: IHS Fairplay

Figure A5: Global commercial shipbuilding activity (in CGT)



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	1H 2016
orderbook	48,946	70,807	92,800	107,200	138,000	183,740	194,166	156,200	128,013	111,442	92,300	102,900	108,146	109,664	101,560
new orders	20,471	41,705	45,128	39,588	57,315	85,277	42,953	16,554	38,581	30,823	24,713	53,839	45,592	39,644	7,098
completions	21,396	22,824	25,461	29,353	34,123	34,640	41,873	44,401	51,573	51,126	47,967	38,068	36,450	37,025	18,805

Data source: IHS Fairplay

Source: IHS Fairplay

Table A1: Domain coverage and membership of trade union organisations

	Organisation	Domain coverage	Type of membership	Total members	Members in the sector	Members in the largest companies
AT	GPA-djp	Sectional overlap	voluntary	277,792*	n.a.	yes
	PRO-GE	Sectional overlap	voluntary	229,776*	n.a.	yes
	GBH	Sectional overlap	voluntary	116,657*	n.a.	yes
BE	ABVV-FGTB Metaal – FGTB Metallos	Sectional overlap	voluntary	n.a.	n.a.	yes
	ACV-CSC Metea	Sectional overlap	voluntary	220,000	n.a.	yes
	ACLVB-CGSLB	Sectional overlap	voluntary	293,952	n.a.	yes
BG	Podkrepa SFMM	Sectional overlap	voluntary	4,560	95	no
	Syndicate 'Korabostroitel' – Varna	Sectionalism	voluntary	680	680	no
CY	OVIEK-SEK	Sectional overlap	voluntary	5,854	8	no
	SEMMHK-PEO	Sectional overlap	voluntary	4,806	12	no
DE	IG Metall	Overlap	voluntary	2,269,281	15,560**	yes
DK	CO-industri	Sectional overlap	voluntary	228,962	n.a.	yes
EL	P.O.E.M.	Overlap	voluntary	~30,000	~1,500	yes
	SENE	Sectionalism	voluntary	~400	~400	yes
	Somatio Ergazomenon Nafpigion Skaramaga 'Triaina'	Sectionalism	voluntary	~800	~800	yes
ES	Industria CCOO	Overlap	voluntary	199,077	4,730	yes
	MCA-UGT	Overlap	voluntary	n.a.	n.a.	yes
	CSIF	Sectional overlap	voluntary	n.a.	n.a.	yes
	Industria-CIG	Sectional overlap	voluntary	n.a.	n.a.	yes***

	Organisation	Domain coverage	Type of membership	Total members	Members in the sector	Members in the largest companies
	ELA Industry and Construction	Sectional overlap	voluntary	n.a.	n.a.	n.a.
	LAB Sindikatua Industry	Sectional overlap	voluntary	n.a.	n.a.	no
	CAT	n.a.	voluntary	n.a.	n.a.	n.a.
FI	Sähköliitto	Sectional overlap	voluntary	19,746	~680	yes
	Pro-liitto	Sectional overlap	voluntary	~100.000	~2,000	yes
	Metalliliitto	Sectional overlap	voluntary	90,000	~2,500	yes
	Puuliitto	Sectional overlap	voluntary	25,000	500	yes
	TEAM	Sectional overlap	voluntary	36,500	~400	yes
FR	FGMM-CFDT	Sectional overlap	voluntary	n.a.	n.a.	yes
	FEAE-CFDT	Sectional overlap	voluntary	10,000	1,950	yes
	FCE-CFDT	Sectional overlap	voluntary	40,000 (2011)	n.a.	yes
	CFE-CGC Métallurgie – FCMTM	Sectional overlap / Overlap	voluntary	35,000	n.a.	yes
	CGT FNTE Etat	Sectional overlap	voluntary	10,000	2,000	yes
	Union CGT FTM Métallurgie	Sectional overlap	voluntary	n.a.	n.a.	yes
	FNIC CGT	Sectional overlap	voluntary	n.a.	n.a.	yes
	FO Métaux	Sectional overlap	voluntary	82,000****	n.a.	yes
	FO Construction	Sectional overlap	voluntary	n.a.	n.a.	n.a.
	Fédération BATI-MAT-TP CFTC	Sectional overlap	voluntary	n.a.	n.a.	n.a.
HR	SMH	Overlap	voluntary	15,000	6,000	yes
HU	Vasas Szakszervezet	Overlap	voluntary	20,400	n.a.	yes
IT	Feneal Uil	Sectional	voluntary	~ 150,000	n.a.	yes

	Organisation	Domain coverage	Type of membership	Total members	Members in the sector	Members in the largest companies
		overlap				
	Filca Cisl	Sectional overlap	voluntary	280,798	n.a.	yes
	Fillea Cgil	Sectional overlap	voluntary	~330,000	n.a.	yes
	UILM	Sectional overlap	voluntary	90,627	3,500	yes
	FIM	Overlap	voluntary	221,349	n.a.	yes
	FIOM	Overlap	voluntary	343,443	n.a.	yes
LT	VLGTDPS	Sectionalism	voluntary	650	650	yes
	KLRDPS	Sectionalism	voluntary	n.a.	n.a.	no
LV	ŪTAF	Sectional overlap	voluntary	1,334	39*****	no
MT	GWU	Overlap	voluntary	39,201	44	yes
NL	CNV	Overlap	voluntary	360,000	1,500	yes
	De Unie	Overlap	voluntary	50,000	n.a.	yes
	FNV	Overlap	voluntary	1,100,000	3,630	yes
	VHP2	Sectional overlap	voluntary	5,000	250	yes
PL	NSZZ Solidarność	Overlap	voluntary	43,797	3,870	yes
	WZPGM	Overlap	voluntary	8,200	1,250	yes
PT	SIMA	Overlap	voluntary	56,000******	652******	yes
	SINDEL	Overlap	voluntary	n.a.	n.a.	n.a.
	FETESE	Overlap	voluntary	n.a.	n.a.	n.a.
	SQTD	Sectional overlap	voluntary	n.a.	n.a.	n.a.
	SERS	Sectional overlap	voluntary	n.a.	n.a.	n.a.
RO	SLNavalistul	Sectional overlap	n.a.	~8,000	2,400	yes
SE	Sveriges Ingenjörer	Sectional overlap	voluntary	118,651	n.a.	yes
	Ledarna	Sectional overlap	voluntary	~90,000	268	yes
	IF Metall	Sectional overlap	voluntary	254,000	1,100*******	yes
	GS	Sectional overlap	voluntary	55,000	n.a.	yes

	Organisation	Domain coverage	Type of membership	Total members	Members in the sector	Members in the largest companies
	SEKO	Sectional overlap	voluntary	~90,000	~300	yes
	Unionen	Sectional overlap	voluntary	~500,000	1,658	yes
SI	Trade union Elan	Overlap	voluntary	490	150	yes
SK	OZ Kovo	Sectional overlap	voluntary	~70,000	~30	yes
UK	GMB	Overlap	voluntary	625,643*	~5,000	n.a.
	Prospect	Sectional overlap	voluntary	90,000	3,500	yes
	UCATT	Sectional overlap	voluntary	61,229*	700+	yes
	Unite	Overlap	voluntary	~1,000,000	13,000	yes

*Notes: * Includes non-active members.*

*** Not counting temporary agency workers and contract workers.*

**** Only in the region of Galicia.*

***** According to the union, reliable data cannot be provided because of its organisation, so the number is an approximation.*

****** SIA ‘BKRR’: 15 union members; AS ‘Tosmare’: 24 union members.*

******* This is a figure provided by SIMA itself. There are no verifiable and reliable data on SIMA’s membership. but the authors have reasons to believe that the number of dues-paying members is far below that provided by SIMA*

******** Estimated*

n.a. = information not available

Source: Eurofound’s network of European correspondents, 2016

Table A2: Domain description of trade union organisations

	Name	Domain description
AT	GPA-djp	White-collar workers in the entire private sector and a few blue-collar workers (for example, in printing and paper industries)
	PRO-GE	Blue-collar workers in the entire sector except for activities under NACE 30.12 (for example, manufacture of rowing boats) and 33.15 (for example repair of rowing boats) and in electricity, metalworking, mining, energy (other than electricity), agriculture, food-processing, tobacco, chemicals, glass production, paper, textile and clothing, vulcanisation, mineral oil and gas, waste and temporary agencies
	GBH	Blue-collar workers in small parts of NACE 30.12 and 33.15 (for example manufacture and repair of rowing boats) and building construction and civil engineering; woodworking; colour processing trades; natural, cast and concrete stone producing and processing trade and industry; ceramic and brick industries; commercial plastics processing industry; sawmill industry; timber processing trades and industries and related fields; chimney sweeping industry; button and zipper industry; chimney sweep trade; mountain torrent and avalanche control; and other small industries
BE	ABVV-FGTB Metaal – FGTB Metallos	Blue-collar workers in the metal sector
	ACV-CSC Metea	Blue-collar workers in the metal sector
	ACLVB-CGSLB	Blue-collar and white-collar workers, also outside the sector
BG	Podkrepa SFMM	Blue-collar and white-collar workers in the shipbuilding sector except for activities under NACE 33.15 (repair and maintenance of ships and boats) and outside the sector e.g. NACE 24.5, 25, 26.1, 27, 28 and 29 in the regions Varna and Burgas
	Vasas Szakszervezet	Blue-collar and white-collar workers in the shipbuilding sector except for activities under NACE 28.11, 30.11 and 30.12 in the regions Varna and Rousse
CY	OVIEK-SEK	Blue-collar and white-collar workers in the shipbuilding sector except for activities under NACE 28.11, which does not exist in Cyprus, and in the private sector: in the metal industry, importers of mechanical vehicles, electricians, clothing, shoemaking, luggage-making, food-drink industry, chemical industry, tobacco industry, newspapers-magazines, typography industry and paper industry. It does not cover public ownership enterprises
	SEMMHK-PEO	Blue-collar and white-collar workers in the shipbuilding sector except for activities under NACE 28.11, which does not exist in Cyprus, and in the private sector: in the metal and steel industries and related subsectors. It does not cover public ownership enterprises
DE	IG Metall	Blue-collar and white-collar workers in the metal industry, metal extraction, iron and steel producing industry and related industries, trades and services; textile and clothing industry and related sectors and businesses; wood working, wood-processing and plastics processing
DK	CO-industri	Blue-collar and white-collar workers (except for engineers and other university graduates) in the entire manufacturing industry sector
EL	P.O.E.M.	Blue-collar and white-collar workers in the metal sector
	SENE	Company-level union covering blue-collar and white-collar workers

	Name	Domain description
	Somatio Ergazomenon Nafpigion Skaramaga 'Triaina'	Company-level union covering all occupations within the company
ES	Industria CCOO	Blue-collar and white-collar workers in the manufacturing sector
	MCA-UGT	Blue-collar and white-collar workers in the metal and construction sector
	CSIF	Blue-collar and white-collar workers in the entire public sector (including the publicly owned company Navantia)
	Industria-CIG	Blue-collar and white-collar workers in the metal and chemical industry in Galicia
	ELA Industry and Construction	Blue-collar and white-collar workers in the manufacture and construction sector in the Basque Country
	LAB Sindikatua Industry	Blue-collar and white-collar workers in the entire sector in the Basque Country
	CAT	Mostly present in Cadiz (Andalusia) and in some cities of Galicia
FI	Sähköliitto	Electricians in the entire sector except for activities under NACE 30.12 (building of pleasure and sporting boats) and other sectors
	Pro-liitto	Mainly white-collar workers in a wide range of sectors, including the entire technology industry and the finance sector
	Metalliliitto	Blue-collar workers in several sectors related to the metal industry: the technology industry, car repair workshops, clerical employees of car retail, telecommunications industry, mining, electricity and power plants, precious metals sector, sheet metal industry, repair works for mechanical forest industry and civilian workers in the Ministry of Defence repair shops
	Puuliitto	Mainly blue-collar workers within the building of pleasure and sporting boats, does not represent activities under NACE 28.11, but also covers the mechanical forestry industry, woodworking industry, forestry and harvesting industries, and agricultural industries
	TEAM	Mainly blue-collar workers in the shipbuilding sector except for activities under NACE 28.11, but also other sectors
FR	FGMM-CFDT	Blue-collar and white-collar workers of activities under NACE 28.11, 30.11 and 33.15 and the metal industry, car manufacturing, automotive suppliers, jewellery, recycling, equipment, repair of agricultural and construction machine, manufacture of games and toys, mining, automotive services ('services de l'automobile')
	FEAE-CFDT	Blue-collar and white-collar workers in the defence shipbuilding company DCNS and other publicly owned companies in the defence industry and the Ministry of Defence
	FCE-CFDT	Blue-collar and white-collar workers of activities under the NACE 30.12 and gas, electricity, petrol, chemical and pharmaceutical industries
	CFE-CGC Métallurgie – FCMTM	Mainly white-collar workers in the shipbuilding sector and other sectors

	Name	Domain description
	CGT FNTE Etat	Blue-collar and white-collar workers in the group DCNS, a publicly owned company, but not activities under NACE 30.12. Covers other sectors as well
	Union CGT FTM Métallurgie	Blue-collar and white-collar workers in activities under NACE 28.11, 30.11 and 33.15 and the entire steel and metal industry (including aeronautics, car manufacturing and railway manufacturing), energy and electronics
	FNIC CGT	Blue-collar and white-collar workers in activities under NACE 30.12 and the oil industry, manufacturing, biological laboratory, pharmaceutical distribution, chemical and pharmaceutical industries
	FO Métaux	Blue-collar and white-collar workers in activities under NACE 28.11, 30.11 and 33.15 and the metal industry, car manufacturing, aeronautic, automotive suppliers, electronic and electric manufacturing, mechanics, jewellery-making
	FO Construction	Blue-collar and white-collar workers in activities under NACE 30.12 and other sectors, including paper, wood industry, materials, ceramics, quarrying, pulp and paper, tiles and bricks, cement, architecture, construction and building
	Fédération BATI-MAT-TP CFTC	Blue-collar and white-collar workers in activities under NACE 30.12 and other sectors: wood industry, wood trading and materials, quarrying, tiles and bricks, lime and cement, ceramics and porcelain, architects, surveyors, economists, social housing, building and construction
HR	SMH	Blue-collar and white-collar workers in the metal industry
HU	Vasas Szakszervezet	Blue-collar and white-collar workers of all activities in manufacturing
IT	Feneal Uil	Blue-collar and white-collar workers in the shipbuilding sector (except for workers involved in the manufacture of engines and turbines) and in construction, woodworking and the stone industry
	Filca Cisl	Blue-collar and white-collar workers in the shipbuilding sector (except for workers involved in the manufacture of engines and turbines) and in construction, woodworking and stone industry
	Fillea Cgil	Blue-collar and white-collar workers in the shipbuilding sector (except for workers involved in the manufacture of engines and turbines) and in construction, woodworking and stone industry
	UILM	Blue-collar and white-collar workers in the metalworking and machinery industry and related sectors and businesses
	FIM	Blue-collar and white-collar workers, also outside the sector
	FIOM	Blue-collar and white-collar workers, also outside the sector
LT	VLGTDPS	Blue-collar and white-collar workers of only one group of companies and only in one region of the country
	KLRDPS	Blue-collar and white-collar workers within one company only
LV	ŪTAF	Blue-collar and white-collar workers of companies involved in maritime transport (including port workers, seafarers, workers at ship repairing enterprises) but not of activities under NACE 28.11, 30.11 and 30.12
MT	GWU	Blue-collar and white-collar workers of the following sectors: professionals, finance and services, public service, technology, electronics and communication, maritime and aviation (which include transport), metal and construction

	Name	Domain description
NL	CNV	Blue-collar and white-collar workers in nearly all sectors of economic activity
	De Unie	Blue-collar and white-collar workers in nearly all sectors of economic activity
	FNV	Blue-collar and white-collar workers in nearly all sectors of economic activity
	VHP2	Highly educated (tertiary education) blue-collar and white-collar workers in diverse technical sectors, but not in the repair and maintenance of ships and boats and usually not in SMEs or publicly owned enterprises
PL	NSZZ Solidarność	Blue-collar and white-collar workers, also outside the sector
	WZPGM	Blue-collar and white-collar workers in the entire sector and port workers
PT	SIMA	Blue-collar and white-collar workers, also in the electric sector
	SINDEL	Blue-collar and white-collar workers, also from the energy sector among others
	FETESE	Blue-collar and white-collar workers of all economic sectors
	SQTD	People who make detailed technical plans or drawings
	SERS	Only engineers (white-collar workers) in all kind of activities
RO	SLNavalistul	n.a.
SE	Sveriges Ingenjörer	Graduate engineers in all sectors
	Ledarna	Managers and others in leading positions in all sectors
	IF Metall	Blue-collar workers in the private sector in various industrial sectors
	GS	Blue-collar workers in the shipbuilding industry, except the manufacture of engines and turbines, but also in forestry, woodworking and graphic industries*
	SEKO	Blue-collar workers in building and repair of (military ships) and the service and communication sectors
	Unionen	White-collar workers in all enterprises within the private sector
SI	Trade union Elan	Blue-collar and white-collar workers within the company Elan
SK	OZ Kovo	Blue-collar and white-collar workers in the metal, steel and electronic industries, road transport
UK	GMB	Blue-collar and white-collar workers within the whole economy
	Prospect	Engineers, technicians, managers and office staff, who work work only in the naval/defence parts of ‘building of ships and floating structures’ and ‘repair and maintenance of ships and boats’, and not in the commercial parts of these sectors or in ‘manufacture of engines and turbines, except aircraft, vehicle and cycle engines’ or ‘building of pleasure and sporting boats’. covers also professional staff (engineers, scientists, managers and other specialists) in a range of industries
	UCATT	Members perform certain construction-/building-related work and work mainly in ‘building of ships and floating structures’ and ‘repair and maintenance of ships and boats’, and not in ‘manufacture of engines and turbines, except aircraft, vehicle and cycle engines’ or ‘building of pleasure

	Name	Domain description
		and sporting boats' (specifically, UCATT members in the sector work principally at the major naval/defence companies and subcontractors working at their sites). organises mainly in the construction and building industry
	Unite	Blue-collar and white-collar workers in the whole economy

*Note: * In general the union states that it is very difficult to define exactly how its domain corresponds to the shipbuilding sector as it does not divide companies according to NACE codes. It says it mostly covers the building of pleasure and sporting boats (particularly sail boats).*

Source: Eurofound's network of European correspondents, 2016

Table A3: Trade unions' international, European and national affiliations

	Organisation	National affiliation	European affiliation	International affiliation
AT	GPA-djp	ÖGB	EPSU, EFFAT, EFJ, industriAll Europe, UNI Europa	UNI Global Union, WOW
	PRO-GE	ÖGB	industriAll Europe, EFFAT	industriAll Global Union, IUF
	GBH	ÖGB	EFBWW	BWI
BE	ABVV-FGTB Metaal – FGTB Metallos	ABVV-FGTB	industriAll Europe	industriAll Global
	ACV-CSC Metea	ACV-CSC	industriAll Europe	industriAll Global
	ACLVB-CGSLB	none	industriAll Europe	industriAll Global
BG	Podkrepa SFMM	CL Podkrepa	industriAll Europe	industriAll Global Union
	Syndicate 'Korabostroitel' – Varna	CITUB	None	none
CY	OVIEK-SEK	Cyprus Workers Confederation – SEK	None	none
	SEMMHK-PEO	Pancyprian Federation of Labour – PEO	None	none
DE	IG Metall	DGB	industriAll Europe	ITF
DK	CO-industri	The Danish Confederation of Trade Unions, LO	industriAll Europe	industriAll Global
EL	P.O.E.M.	Greek General Confederation of Labour (GSEE)	industriAll Europe	none
	SENE	Panhellenic Federation of Labour Metal Workers (P.O.E.M.)	none	none

	Organisation	National affiliation	European affiliation	International affiliation
	Somatio Ergazomenon Nafpigion Skaramaga 'Triaina'	Panhellenic Federation of Labour Metal Workers (P.O.E.M.)	None	none
ES	Industria CCOO	CCOO	industriAll Europe	none
	MCA-UGT	UGT	industriAll Europe	none
	CSIF	none	None	none
	Industria-CIG	none	None	none
	ELA Industry and Construction	none	industriAll Europe	none
	LAB Sindikatua Industry	none	None	none
	CAT	n.a.	n.a.	n.a.
FI	Sähköliitto	SAK	EFBWW, industriAll Europe	BWI, industriAll Global, NBTF (Nordic Federation of Building and Wood Workers), NEF (Nordic Federation of Electricians)
	Pro-liitto	The Finnish Confederation of Professionals STTK	industriAll Europe	industriAll Global Union
	Metalliliitto	SAK	industriAll Europe	industriAll Global Union, UNI Global Union, Nordic-IN
	Puuliitto	SAK	None	none
	TEAM	SAK (among others)	industriAll Europe	industriAll Global Union
FR	FGMM-CFDT	French Democratic Federation of Labour (Confédération française démocratique du travail, CFDT)	industriAll Europe	industriAll Global Union
	FEAE-CFDT	French Democratic Federation of Labour (Confédération française démocratique du travail, CFDT)	industriAll Europe	none
	FCE-CFDT	Confédération Française Démocratique du Travail (CFDT)	industriAll Europe	industriAll Global Union

	Organisation	National affiliation	European affiliation	International affiliation
	CFE-CGC Métallurgie – FCMTM	French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff (Confédération française de l'encadrement – confédération générale des cadres, CFE-CGC)	industriAll Europe	industriAll Global Union
	CGT FNTE Etat	General Confederation of Labour (Confédération générale du travail, CGT)	industriAll Europe	industriAll Global Union
	Union CGT FTM Métallurgie	General Confederation of Labour (Confédération générale du travail, CGT)	industriAll Europe	industriAll Global Union
	FNIC CGT	General Confederation of Labour (Confédération générale du travail, CGT)	industriAll Europe	industriAll Global Union
	FO Métaux	General Confederation of Labour – Force ouvrière (Confédération générale du travail – Force Ouvrière)	industriAll Europe	industriAll Global Union
	FO Construction	General Confederation of Labour – Force ouvrière (Confédération générale du travail – Force Ouvrière, CGT-FO)	EFBWW	BWI
	Fédération BATI-MAT-TP CFTC	Confédération Française des Travailleurs Chrétiens	EFBWW	BWI

	Organisation	National affiliation	European affiliation	International affiliation
		(CFCT)		
HR	SMH	SSSH	industriAll Europe	industriAll Global Union
HU	Vasas Szakszervezet	Magyar Szsakszervezetek Szövetsége – MASZSZ (Hungarian Trade Union Confederation)	industriAll Europe	industriAll Global Union
IT	Feneal Uil	Unione Italiana del lavoro (UIL)	EFBWW	BWI
	Filca Cisl	CISL	EFBWW	BWI
	Fillea Cgil	CGIL	EFBWW	BWI
	UILM	UIL	industriAll Europe	industriAll Global Union
	FIM	CISL	industriAll Europe	industriAll Global Union
	FIOM	CGIL	industriAll Europe	industriAll Global Union
LT	VLGTDPS	n.a.	none	n.a.
	KLRDPS	n.a.	none	n.a.
LV	ŪTAF	LBAS	ETF	ITF
MT	GWU	none	ETUC, ETF, EFFAT, EPSU, Eurocadres, UNI Europa, European Workers' Education Association (EURO WEA), Federation of Europe Retired Personnel Association, European Central Banks Federation (SCECBU), industriAll Europe	ILO, ITUC, ITF, IUF, industriAll Global Union, PSI, International Textile, Garment and Leather Workers' Federation, Union Network International (UNI), International Federation of Musicians, IFWEA
NL	CNV	none	industriAll Europe, ETUC	industriAll Global Union, ITUC
	De Unie	none	industriAll Europe	industriAll Global Union
	FNV	none	industriAll Europe, ETUC	industriAll Global Union, ITUC
	VHP2	Vakcentrale voor professionals (Trade union federation for Professionals), VCP	Eurocadres	none
PL	NSZZ Solidarność	NSZZ Solidarność	industriAll Europe	industriAll Global

	Organisation	National affiliation	European affiliation	International affiliation
				Union
	WZPGM	OPZZ (Ogólnopolskie Porozumienie Związków Zawodowych, All-Poland Alliance of Trade Unions)	None	none
PT	SIMA	none	industriAll Europe	none
	SINDEL	UGT	EPSU, industriAll Europe	n.a.
	FETESE	UGT	n.a.	n.a.
	SQTD	CGTP-IN	n.a.	n.a.
	SERS	n.a.	n.a.	n.a.
RO	SLNavalistul	BNS – National Trade Union Bloc, Blocul National Sindical	None	none
SE SI	Sveriges Ingenjörer	Swedish Confederation of Professional Associations (SACO), The Council for Negotiation and Cooperation (Förhandlings- och samverkansrådet, PTK), The unions in industry (Facken inom industrin)	industriAll Europe, UNI Europa	industriAll Global Union, UNI Global
	Ledarna	none	CEC European Managers, FECCIA	none
	IF Metall	The Swedish Trade Union Confederation (LO), The unions in industry (Facken inom industrin)	industriAll Europe, Nordic-IN	industriAll Global Union
	GS	The Swedish Trade Union Confederation (LO), The unions in industry (Facken inom industrin)	EFBWW, Nordic Federation of Building and Wood Workers (NFBWW)	BWI
	SEKO	LO	none	none
	Unionen	The Swedish Confederation for Professional Employees (TCO), The Council for	industriAll Europe	industriAll Global Union

	Organisation	National affiliation	European affiliation	International affiliation
		Negotiation and Cooperation (Förhandlings- och samverkansrådet, PTK), The unions in industry (Facken inom industrin)		
	Trade union Elan	Association of Free Trade Unions of Slovenia (ZSSS)	n.a.	n.a.
SK	OZ Kovo	Confederation of Trade Unions (KOZ SR)	EPSU, industriAll Europe	PSI
UK	GMB	Trades Union Congress (TUC), Confederation of Shipbuilding and Engineering Unions (CSEU)	industriAll Europe, EFBWW, EFFAT, EPSU, ETF, UNI Europa	industriAll Global Union, BWI, ITF, IUF, PSI, UNI Global Union
	Prospect	TUC, Confederation of Shipbuilding and Engineering Unions (CSEU)	Eurocadres, EPSU, ETF, UNI Europa	ITF, Public Services International (PSI), UNI Global Union
	UCATT	TUC, Confederation of Shipbuilding and Engineering Unions (CSEU)	EFBWW	BWI
	Unite	TUC, Confederation of Shipbuilding and Engineering Unions (CSEU)	industriAll Europe, EFBWW, EFFAT, EPSU, ETF, UNI Europa	industriAll Global Union, BWI, ITF, IUF, PSI, UNI Global Union

Note: n.a. = information not available

Source: Eurofound's network of European correspondents, 2016

Table A4: Collective bargaining and consultation – trade unions

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
AT	GPA-djp	MEB (sectoral and occupational)	500**	n.a.	n.a.
	PRO-GE	MEB (sectoral and occupational)	1,500**	n.a.	n.a.
	GBH	MEB (sectoral and occupational)	300-400**	n.a.	n.a.
BE	ABVV-FGTB Metaal – FGTB Metallos	SEB and MEB bargaining	100%	n.a.	n.a.
	ACV-CSC Metea	SEB and MEB bargaining	100%	n.a.	n.a.
	ACLVB-CGSLB	SEB and MEB	100%	n.a.	n.a.
BG	Podkrepa SFMM	SEB and MEB bargaining	750 (2014)	Yes	On an ad hoc basis
	Syndicate 'Korabostroitel' – Varna	SEB (company level)	680 (2014)	No	–
CY	OVIEK-SEK	SEB	n.a.	No	–
	SEMMHK-PEO	SEB	n.a.	No	–
DE	IG Metall	SEB and MEB	About 99% of the employees who, under law, can be covered by a sectoral multiemployer or single-employer agreement	Yes	On a regular basis
DK	CO-industri	MEB (sectoral/branch)	n.a.	Yes	On an ad hoc basis
EL	P.O.E.M.	MEB (national cross-sectoral)	n.a.	Yes	On an ad hoc basis
	SENE	SEB (company level)	~400	Yes	On an ad hoc basis
	Somatio Ergazomenon Nafpigion Skaramaga 'Triaina'	SEB (company level)	~800	Yes	On an ad hoc basis
ES	Industria CCOO	SEB and MEB bargaining	~45,000*	Yes	On an ad hoc basis

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
	MCA-UGT	SEB and MEB	n.a.	n.a.	n.a.
	CSIF	SEB	4,000	No	-
	Industria-CIG	SEB and MEB (local level)	n.a.	Yes	n.a.
	ELA Industry and Construction	SEB and MEB	n.a.	n.a.	n.a.
	LAB Sindikatua Industry	SEB and MEB	n.a.	Yes	On an ad hoc basis
	CAT	SEB	n.a.	n.a.	n.a.
FI	Sähköliitto	MEB (intersectoral occupational)	850**	No	–
	Pro-liitto	MEB (cross-sectoral)	~2,400 within the sector*****	Yes	On a regular basis
	Metalliliitto	MEB (cross-sectoral)	2,900 within the sector (2015)**	Yes	On a regular basis
	Puuliitto	MEB (sectoral/branch)	790 (2014)	Yes	On a regular basis
	TEAM	MEB (cross-sectoral)	~14,000******	No	–
FR	FGMM-CFDT	SEB and MEB	31,000**	Yes	On an ad hoc basis
	FEAE-CFDT	SEB (DCNS)	9,000 + 4,500	Yes	On a regular basis
	FCE-CFDT	SEB and MEB: sectoral/branch)	10,000**	n.a.	n.a.
	CFE-CGC Métallurgie – FCMTM	SEB and MEB	41,000**	Yes	On a regular basis
	CGT FNTE Etat	SEB (DCNS)	9,000 + 4,500	Yes	On an ad hoc basis
	Union CGT FTM Métallurgie	SEB and MEB	31,000**	Yes	On a regular basis
	FNIC CGT	SEB and MEB	10,000**	n.a.	n.a.
	FO Métaux	SEB and MEB	31,000**	Yes	On a regular basis
	FO Construction	SEB and MEB	10,000**	n.a.	n.a.
	Fédération BATI-MAT-TP CFTC	SEB and MEB	10,000**	n.a.	n.a.
HR	SMH	SEB (company level)	6,000	No	–

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
HU	Vasas Szakszervezet	No sector-related collective bargaining	–	Yes	On an ad hoc basis
IT	Feneal Uil	SEB and MEB	n.a.	Yes	On an ad hoc basis
	Filca Cisl	SEB and MEB	n.a.	Yes	On an ad hoc basis
	Fillea Cgil	SEB and MEB	n.a.	Yes	On an ad hoc basis
	UILM	SEB and MEB (national and company level)	50,000	Yes	On a regular basis, on an ad hoc basis
	FIM	SEB and MEB	n.a.	Yes	On an ad hoc basis
	FIOM	SEB and MEB	n.a.	Yes	On an ad hoc basis
LT	VLGTDPS	SEB (group agreements)	~1,650	Yes	On an ad hoc basis
	KLRDPS	SEB	~60	Yes	On an ad hoc basis
LV	ŪTAF	SEB (company level)	CA cover all employees (unionised and non-unionised)	Yes	On an ad hoc basis
MT	GWU	SEB (company level)	50	Yes	On an ad hoc basis
NL	CNV	MEB (sectoral/branch)	11,580 (2014)	Yes	On an ad hoc basis
	De Unie	MEB (sectoral/branch)	11,580 (2014)	n.a.	n.a.
	FNV	MEB (sectoral/branch)	11,580 (2014)	Yes	On an ad hoc basis
	VHP2	SEB and MEB	3,080 (2014)	Yes	On an ad hoc basis
PL	NSZZ Solidarność	SEB (company level)	Not more than 10%**	Yes	On a regular basis***
	WZPGM	SEB (company level)	Not more than 10%**	Yes	On a regular basis***
PT	SIMA	SEB (company level)	n.a.	Yes	On an ad hoc basis

	Name	Collective bargaining	Number of employees covered by the collective agreement	Consultation	Consultation pattern
	SINDEL	MEB	50,000	n.a.	n.a.
	FETESE	MEB for the whole metal sector****	60,000	n.a.	n.a.
	SQTD	Multiemployer bargaining	n.a.	n.a.	n.a.
	SERS	MEB	1,750	n.a.	n.a.
RO	SLNavalistul	SEB	n.a.	Yes	On an ad hoc basis
SE	Sveriges Ingenjörer	Multiemployer agreement (sectoral/branch)	n.a.	Yes	On an ad hoc basis
	Ledarna	Multiemployer agreement (sectoral/branch)	230*******	No	–
	IF Metall	Multiemployer agreement (sectoral/branch)	1,100**	Yes	On an ad hoc basis
	GS	Multiemployer agreement (sectoral/branch)	n.a.	Yes	On an ad hoc basis
	SEKO	Multiemployer agreement (sectoral/branch)	300*******	n.a.	n.a.
	Unionen	Multiemployer agreement (sectoral/branch)	1,590*******	No	–
SI	Trade union Elan	SEB (group agreements)	150	No	–
SK	OZ Kovo	Multiemployer agreement (sectoral/branch)	~100	Yes	On a regular basis
UK	GMB	SEB (plant agreements)	15,000+**	n.a.	n.a.
	Prospect	SEB (plant agreements)	3,500********	Yes	On an ad hoc basis
	UCATT	SEB (plant agreements)	n.a.	n.a.	n.a.
	Unite	SEB (plant agreements)	13,000********	Yes	On an ad hoc basis

Notes: n.a. = information not available.

** Includes workers outside the shipbuilding sector.*

*** No data available, only estimates.*

**** Consultation about sector-related drafts of legal acts.*

***** Agreement signed by FENAME – National Metal Federation (Federação Nacional do Metal), with a mandate from AIN to include AIN's members into the agreement.*

****** Agreement covers around 22,300 employees altogether, including other sectors.*

******* Other sectors included.*

******** Only within that union.*

********* Number of the union's members (plus an unknown number of non-members).*

Source: Eurofound's network of European correspondents, 2016

Table A5: Domain coverage and membership of employer organisations

	Organisation	Domain coverage	Type of membership	Total members (companies)	Members in the sector (companies)	Total number of employees in member companies	Total number of employees in sector-related member companies	Members in the largest companies
AT	FMMI	Sectional overlap	Compulsory	1,409 (2014)	<10	125,300 (2014)	~2,000	Yes
	BIT	Sectional overlap	Compulsory	8,916 (2014)	72 (2014)	32,131 (2014)	300–400 (2015)	No
BE	Agoria	Overlap	Voluntary	1,700 (2014)	n.a.	275,000 (2014)	n.a.	Yes
BG	BBCMB	Sectional overlap	Voluntary	279 (2014)	3 (2014)	n.a.	n.a.	No
	BULNAS	Sectionalism or sectional overlap	Voluntary	41 (2014)	n.a.	4,000 (2014)	n.a.	n.a.
CZ	APL	Sectional overlap	Voluntary	70 (2015)	~65 (2015)	n.a.	n.a.	Yes
DE	Gesamtmetall	Overlap	Voluntary	3,554 (December 2014)	100 (December 2014)	1,810,000 (December 2014)	30,000 (December 2014)	Yes
	VSM	Congruent	Voluntary	140 (November 2015)[11] (160 as of August 2016)	140 (November 2015) (160 as of August 2016)	n.a.	n.a.	Yes
DK	Danske Maritime	Overlap	Voluntary	72	n.a.[8]	n.a.	n.a.	Yes
EL	HEMEXPO	Sectional overlap	Voluntary	17	n.a.	n.a.	n.a.	n.a.
ES	PYMAR	Sectionalism	Voluntary	26	26	1,570	1,570	No
	ACLUNAGA	Sectional overlap	Voluntary	115	85	5,453	4,200	Yes
	The Basque Maritime Forum	Sectional overlap	Voluntary	n.a.	n.a.	n.a.	n.a.	Yes
FI	Teknologiateollisuus / Meriteollisuus	Sectional overlap	Voluntary	1,600+	31 (2015)	~220,000	~6,700 (2015)	Yes
	Kemianteollisuus	Sectional overlap	Voluntary	400	1 (2015)	34,000	~300 (2015)	No
	Veneteollisuuden työnantajat	Sectional overlap	Voluntary	16	15 (2015)	1,500	1,200 (2015)	Yes

	Organisation	Domain coverage	Type of membership	Total members (companies)	Members in the sector (companies)	Total number of employees in member companies	Total number of employees in sector-related member companies	Members in the largest companies
FR	GICAN	Sectional overlap	Voluntary	163 (January 2015)	163 (January 2015)	32,000 (December 2015)	32,000[1] (December 2015)	Yes
	UIMM	Sectional overlap	Voluntary	n.a.[2]	n.a.	n.a.	n.a.	Yes
	FIN	Sectional overlap	Voluntary	600	n.a.	n.a.	n.a.	Yes
HR	HBJ	Sectionalism	Compulsory[3]	4	4	6,500	6,500	Yes
	UMB	Sectionalism	Compulsory[4]	150	150	800	800	No
	ZPBO	Congruent	Voluntary	200	200	4,000	4,000	Yes
IT	Federlegno	Sectional overlap	Voluntary	n.a.	n.a.	n.a.	n.a.	Yes
	ASSONAVE	Sectionalism	Voluntary	30 (2014)	30 (2014)	10,799 (2014)	10,799 (2014)	Yes
	Federmeccanica	Overlap	Voluntary	16,000	n.a.	800,000	n.a.	Yes
	ANCPL	Sectional overlap	Voluntary	~1,000	2	~30,000	60	Yes
	AGCI Produzione e Lavoro	Sectional overlap	Voluntary	n.a.	n.a.	n.a.	n.a.	Yes
	Confcooperative – Federlavoro e servizi	Sectional overlap	Voluntary	n.a.	n.a.	n.a.	n.a.	Yes
	CNA Produzione	Sectional overlap	Voluntary	n.a.	n.a.	~40,000 (2014)	n.a.	No
	CLAAI	Sectional overlap	Voluntary	~18,000 (2014)	n.a.	~90,000 (2014)	n.a.	No
	CONFIMI Impresa Meccanica	Sectional overlap	Voluntary	n.a.	n.a.	n.a.	n.a.	No
	CONFIMI Impresa Legno	Sectional overlap	Voluntary	~350 (2013)	n.a.	~5,000 (2013)	n.a.	No
LT	LLSRA	Overlap	Voluntary	21 (2015)	14 (2015)	1,840	~1,375	Yes
NL	FME	Sectional overlap	Voluntary	2,300 (2015)	n.a.	225,000 (2015)	n.a.	Yes
	Metaalunie	Sectional overlap	Voluntary	13,000 (2015)	170 (2015)	150,000 (2015)	n.a.	No

	Organisation	Domain coverage	Type of membership	Total members (companies)	Members in the sector (companies)	Total number of employees in member companies	Total number of employees in sector-related member companies	Members in the largest companies
	NMT	Overlap	Voluntary	421 (2015)[5]	421 (2015)	28,000 (2014)	14,000 (2014)	Yes
PL	Forum Okrętowe	Overlap	Voluntary	62 (December 2015)	62 (December 2015)	9,900 (December 2015)	9,990 (December 2015)	Not all
PT	AIN[9]	Sectional overlap	Voluntary	343 (2014)	31 (2015)	879	879 (2014)[10]	yes
RO	ANCONAV	Sectional overlap	Voluntary	52[6]	52	~17,000	~17,000	Yes
SE	Teknikföretagen	Overlap	Voluntary	3,800 (2015)	33 (2014)	~300,000 (2015)	5,900 (2014)	Yes
	IKEM	Sectional overlap	Voluntary	1,400 (2015)[7]	~6–7 (2015)	70,000 (2015)	~100 (2015)	No
	TMF	Sectional overlap	Voluntary	700 (2015)	~20 (2015)	30,000 (2015)	~500 (2015)	Yes
SK	ZSP SR	Sectional overlap	Voluntary	66 (2015)	1 (2015)	15,229 (2015)	~100 (2015)	Yes
UK	SSA	Overlap	Voluntary	100	n.a.	~9,000	n.a.	No
	SMI	Sectional overlap	Voluntary	150	n.a.	n.a.	n.a.	Yes

Notes: n.a. = information not available

1 According to GICAN, the total employees of their member companies has no real meaning because GICAN has within its members companies such as Airbus, Sagem and Thales, where employees are only partially working in the shipbuilding sector.

2 The organisation has no direct affiliated companies.

3 For the shipyards being restructured.

4 For the SMEs in the boatbuilding industry.

5 Excludes 'associate members'

6 Nine shipyards, classification registries, design companies.

7 ~1,200 on the employer organisation side of IKEM and ~200 on the industrial organisation side of IKEM

8 In the case of Danske Maritime, the national correspondent of Eurofound in Denmark indicated that there were 72 members in the sector (companies), but according to SEA Europe it remains unclear whether these 72 companies fall under the NACE code definition used in this study. According to SEA Europe, the total number of member companies is 72.

9 According to SEA Europe, there is only one sector-related employer organisation active in Portugal (AIN). AIN forms together with ANEME the umbrella organisation FENAME, which is directly involved in collective bargaining. AIN is not directly involved in sector-related collective bargaining.

10 According to SEA Europe and AIN, there are 879 employees in member companies of AIN. The total number of employees in shipbuilding is 2,939; the total number of employees in the sector as defined by the NACE codes of this study is 4,917.

[11] *Recent figures provided by SEA Europe affiliate in Germany in October 2016.*
Source: Eurofound's network of European correspondents, 2016

Table A6: Domain description of employer organisations

	Name	Description
AT	FMMI	Enterprises within NACE 28.11, 30.11 and parts of 30.12 and active in steel construction, metal production, engineering and so on.
	BIT	Enterprises within parts of NACE 30.12 and 33.14 (manufacture and repair of pleasure and sporting boats) and business activities such as carpenters, wood-designing, floor covering work and so on.
BE	Agoria	Metal and technology sector
BG	BBCMB	Shipbuilding sector except for parts of NACE 33.15 (repair and maintenance of ships and boats) and business activities in other sectors, for example, NACE 24.5, 25, 28 and 29 in the regions Varna and Burgas
	BULNAS	Shipbuilding sector in the regions Varna and Burgas
CZ	APL	Mostly SMEs and privately owned companies (no multinationals in shipbuilding and other sectors) such as diving, bridge-building, travel agencies, magazine publishing
DE	Gesamtmetall	Metalworking and electrical industry
	VSM	Maritime industry
DK	Danske Maritime	Maritime industry
EL	HEMEXPO	Large marine equipment companies and other companies in designing and producing products for the building, conversion, maintenance of ships (sea-going and inland) and maritime structures. This includes technical services in engineering, installation and commissioning, and ship maintenance (including repair), with optimum after-sales customer support
ES	PYMAR	Integrated by private small and medium-sized shipyards in activities under NACE 30.1 (building of ships and boats)
	ACLUNAGA	Shipbuilding sector and other sectors such as chemical industry, engineering activities, technological centres in Galicia
	The Basque Maritime Forum	Shipbuilding sector and other maritime activities in the Basque Country
FI	Teknologiateollisuus / Meriteollisuus	Shipbuilding sector except for NACE 30.12 and 33.15 and the entire technology sector, including electronics and the electrotechnical industry, mechanical engineering, manufacturing, the metals industry, information technology industries and consulting engineering
	Kemianteollisuus	Shipbuilding sector except for NACE 28.11, 30.11 and 33.15 and the chemical sector
	Veneteollisuuden työnantajat	Private companies in the shipbuilding sector except for NACE 28.11, 30.11 and 33.15 and in the chemical sector
FR	GICAN	Shipbuilding sector in activities under NACE 28.11, 30.12 and 33.15 and maritime renewal energies
	UIMM	Shipbuilding sector except for activities under NACE 30.12 and the entire metal industry sector

	Name	Description
	FIN	Shipbuilding sector in activities under NACE 30.12 and 33.15 and other sectors
HR	HBJ	Croatian Shipbuilding Corporation involved in monitoring the restructuring process of Croatian shipyards
	UMB	SMEs in the shipbuilding sector
	ZPBO	Shipbuilding sector
IT	Federlegno	Furniture and woodworking sectors
	ASSONAVE	Shipbuilding sector except for companies involved in the building of pleasure and sporting boats
	Federmeccanica	Metalworking and machinery industries
	ANCPL	Cooperatives in the manufacture and construction sectors
	AGCI Produzione e Lavoro	Cooperatives in the manufacture and construction sectors
	Confcooperative – Federlavoro e servizi	Cooperatives in the shipbuilding sector and other sectors
	CNA Produzione	Private SMEs and craftspeople in the metal, woodworking, furniture, chemical, rubber and plastic sector
	CLAAI	Private SMEs and craftspeople in handcraft and trade activities
	CONFIMI Impresa meccanica	Private SMEs in the metalworking and machinery industries
	CONFIMI Impresa Legno	Private SMEs in the woodworking sector
LT	LLSRA	Shipbuilding sector and some members working in education and training, construction and some other shipbuilding-related sectors
NL	FME	Publicly owned enterprises in the metal industry, electrotechnical industry, the metal and technical branch and related service activities
	Metaalunie	SMEs building yachts or SMEs with metal-related activities
	NMT	Shipbuilding sector, suppliers, service activities related to maritime technology and knowledge and education institutes
PL	Forum Okrętowe	Shipbuilding sector including research institutions and universities, lawyers, banks, insurance companies connected to the shipbuilding sector (as associate members)
PT	AIN*	Shipbuilding sector except for activities under NACE 28.11 and other related activities
RO	ANCONAV	Shipbuilding sector and other sectors
SE	Teknikföretagen	All technological sectors
	IKEM	Smaller-sized companies (fewer than 250 employees), mainly manufacturers of floating structures and plastic pleasure and sporting boats and the chemical sector generally, including chemical and plastics industries, pharmaceutical manufacturers or biochemistry and biotech companies

	Name	Description
	TMF	Shipbuilding sector in activities under NACE 30.12 and, to some extent, 33.15 as well as all companies in the furniture and wood-processing industry
SK	ZSP SR	Shipbuilding sector and a wide range of companies, for example those involved with machinery, metal cutting, automotive industry, management, research and development and related education.
UK	SSA	Shipbuilding sector as well as maritime supply and service companies. At national level, member of UK Marine Industries Alliance including Marine Industries Leadership Council
	SMI	Shipbuilding sector except for companies building pleasure and sporting boats as well as ports and terminals infrastructure, offshore energy and oceanography. At national level, member of UK Marine Industries Alliance including Marine Industries Leadership Council

Notes: n.a. = information not available.

** Eurofound's Portugal correspondent identified another sector-related employer umbrella organisation, FENAME formed by AIN and ENAME. FENAME is involved in sector-related collective bargaining. AIN, as an organisation, is not directly involved. According to SEA Europe, FENAME is not specifically sector-related and was thus deleted from this table.*

Source: Eurofound's network of European correspondents, 2016

Table A7: Domain description of corporate members

	Name	Description
BE	Port of Antwerp	Companies outside the sector in industrial relations
	Promat International	Company specialising in the dynamic business of sophisticated fire science technologies
ES	Navantia	Activities under NACE 30.1 (building of ships and boats) and 33.15 (repair and maintenance of ships and boats)
SI	Elan d.o.o	No information available

Source: Eurofound's network of European correspondents, 2016

Table A8: Affiliations of employer organisations and corporate members

	Organisation	National affiliation	European affiliation	International affiliation
AT	FMMI	WKÖ	none	CIMAC (International Council of Combustion Engines)
	BIT	WKÖ	none	none
BE	Agoria	n.a.	n.a.	n.a.
	Port of Antwerp*	CEPA	SEA Europe	n.a.
	Promat International*	Agoria	SEA Europe	n.a.
BG	BBCMB	Bulgarian Industrial Association, Bulgarian Industrial Capital	CEEMET	none

	Organisation	National affiliation	European affiliation	International affiliation
		Association, Bulgarian Chamber of Commerce and Industry		
	BULNAS	n.a.	SEA Europe, CESA	n.a.
CZ	APL	none	EBI	ICOMIA (International Council of Marine Industry Associations)
DE	Gesamtmetall	BDA	CEEMET	none
	VSM	CMT (Centre of Maritime Technologies eV), Foundation Offshore Windenergy, VBW (Association for European Inland Navigation and Waterways). VSM is the umbrella organisation for the German Boat- and Shipbuilding Association (DBSV, 400 member companies).	SEA Europe	none
DK	Danske Maritime	DI and Confederation of Danish Employers (DA)	SEA Europe	Observer status in IMO (International Maritime Organization)
EL	HEMEXPO	n.a.	SEA Europe	n.a.
ES	PYMAR	none	SEA Europe	none
	ACLUNAGA	none	SEA Europe	none
	The Basque Maritime Forum	none	SEA Europe	none
	Navantia*	Spanish Association of Defence, Aeronautics and Space Technology Companies (TEDAE), AIaAIN	The Aero Space and Defence Industries Association of Europe (ASD), SEA Europe	none
FI	Teknologiateollisuus / Meriteollisuus	Confederation of Finnish Industries	CEEMET, Orgalime, SEA Europe (via Finnish Marine Industries)	CIMAC (International Council on Combustion Engines) via Finnish Marine Industries
	Kemianteollisuus	none	Cefic	ICAA
	Veneteollisuuden työnantajat	none	none	none
FR	GICAN	Union des Industries et	SEA Europe	none

	Organisation	National affiliation	European affiliation	International affiliation
		Métiers de la Métallurgie (UIMM)		
	UIMM	MEDEF – CGPME	CEEMET	none
	FIN	none	European Boating Industry	none
HR	HBJ	none	SEA Europe	The OECD Council Working Party on Shipbuilding (WP6)
	UMB	Croatian Chamber of Economy	SEA Europe	none
	ZPBO	Croatian Chamber of Economy	SEA Europe	none
IT	Federlegno	Confindustria	CEI-Bois, European furniture industries confederation	none
	ASSONAVE	Confindustria	SEA Europe	none
	Federmeccanica	Confindustria	CEEMET	none
	ANCPL	Legacoop	CECOP-CICOPA	none
	AGCI Produzione e Lavoro	AGCI	CECOP-CICOPA	none
	Confcooperative – Federlavoro e servizi	Confcooperative	CECOP-CICOPA	none
	CNA Produzione	CAN	UEAPME, EMU	none
	CLAAI	none	none	none
	CONFIMI Impresa meccanica	CONFIMI	none	none
	CONFIMI Impresa Legno	CONFIMI	none	none
LT	LLSRA	Confederation of Lithuanian Industrialists (LPK)	SEA Europe	none
NL	FME	VNO-NCW	CEEMET, Orgalime	none
	Metaalunie	MKB Nederland (SME Netherlands)	EMU	none
	NMT	Nederland Maritiem Land (NML), FME	SEA Europe	none
PL	Forum Okrętowe	Konfederacja Lewiatan	SEA Europe	none
PT	AIN**	CIP (Entrepreneurial Confederation of Portugal), FENAME – National Metal Federation	SEA Europe	n.a.

	Organisation	National affiliation	European affiliation	International affiliation
RO	ANCONAV	none	SEA Europe	none
SE	Teknikföretagen	The Confederation of Swedish Enterprise (Svenskt Näringsliv)	CEEMET, ORGALIME	none
	IKEM	The Confederation of Swedish Enterprise (Svenskt Näringsliv)	ECEG, Cefic, EuPC, Fecc	none
	TMF	The Confederation of Swedish Enterprise (Svenskt Näringsliv)	CEI-Bois	none
SI	Elan d.o.o*	n.a.	n.a.	n.a.
SK	ZSP SR	National Union of Employers (RUZ SR), Alliance of Employer Associations in Industry	none	none
UK	SSA	UK Marine Industries Alliance (including Marine Industries Leadership Council)	SEA Europe	none
	SMI	UK Marine Industries Alliance, Trade Association Forum	SEA Europe	none

Notes: n.a. = information not available

** Companies, corporate members of SEA Europe.*

**** Eurofound's Portugal correspondent identified another sector-related employer organisation FENAME. AIN together with ENAME form the umbrella organisation FENAME, which is involved in sector-related collective bargaining. AIN as an organisation is not directly involved. According to SEA Europe, FENAME is specifically sector-related and was hence deleted from this table.*

Source: Eurofound's network of European correspondents, 2016

Table A9: Collective bargaining and consultation – employer organisations

	Name	Form/level of bargaining	Number of employees covered by bargaining	Consultation	Consultation pattern
AT	FMMI	MEB (sectoral and occupational)	~2,000	n.a.	n.a.
	BIT	MEB (sectoral/branch and occupational)	300–400	n.a.	n.a.
BE	Agoria	SEB and MEB	100%	n.a.	n.a.
BG	BBCMB	SEB and MEB	750 (2014)	Yes	On an ad hoc basis
	BULNAS	Not involved in collective bargaining	–	n.a.	n.a.
CZ	APL	Not involved in collective bargaining	–	Yes	On a regular basis
DE	Gesamtmetall	Not involved in collective bargaining[4]	~30,000 (October 2015)	No	–
	VSM	Not involved in collective bargaining[5]	–	Yes	On an ad hoc and on a regular basis
DK	Danske Maritime	Not involved in collective bargaining[6]	n.a.	Yes	On an ad hoc basis
EL	HEMEXPO	Not involved in collective bargaining	–	No	–
ES	PYMAR	Not involved in collective bargaining	–	Yes	n.a.
	ACLUNAGA	Not involved in collective bargaining	–	Yes	On a regular basis
	The Basque Maritime Forum	Not involved in collective bargaining	–	n.a.	n.a.
FI	Teknologiateollisuus / Meriteollisuus	MEB (intersectoral)	100% (~200,000)	Yes	On an ad hoc basis
	Kemianteollisuus	MEB (sectoral/branch)	~300*	No	–
	Veneteollisuuden työnantajat	MEB (sectoral/branch)	1,200 (2015)	Yes	On an ad hoc basis
FR	GICAN	Not involved in collective bargaining[2]	n.a.	Yes	On a regular basis
	UIMM	MEB[2]	~1,250,000	Yes	On a regular

	Name	Form/level of bargaining	Number of employees covered by bargaining	Consultation	Consultation pattern
					basis
	FIN	MEB (sectoral/branch)	n.a.	n.a.	n.a.
HR	HBJ	Not involved in collective bargaining	–	Yes	On a regular basis
	UMB	Not involved in collective bargaining	–	No	–
	ZPBO	Not involved in collective bargaining	–	No	–
IT	Federlegno	SEB and MEB	n.a.	Yes	On an ad hoc basis
	ASSONAVE	Not involved in collective bargaining	–	Yes	On an ad hoc basis
	Federmeccanica	SEB and MEB	n.a.	Yes	On an ad hoc basis
	ANCPL	SEB and MEB	n.a.	Yes	On a regular basis
	AGCI Produzione e Lavoro	SEB and MEB	n.a.	Yes	On a regular basis
	Confcooperative – Federlavoro e servizi	SEB and MEB	n.a.	n.a.	n.a.
	CNA Produzione	SEB and MEB	n.a.	n.a.	n.a.
	CLAAI	SEB and MEB	n.a.	n.a.	n.a.
	CONFIMI Impresa meccanica	SEB and MEB	n.a.	n.a.	n.a.
	CONFIMI Impresa Legno	SEB and MEB	n.a.	n.a.	n.a.
LT	LLSRA	SEB	~160**	Yes	On an ad hoc basis
NL	FME	MEB (sectoral/branch)	11,080 (2014)	Yes	Both on a regular and an ad hoc basis
	Metaalunie	MEB (sectoral/branch)	n.a.	n.a.	n.a.
	NMT	Not involved in collective bargaining	–	Yes	On a regular basis
PL	Forum Okrętowe	Not involved in collective bargaining	–	Yes	On a regular basis
PT	AIN[1]	Not involved in collective bargaining	–	Yes	On a regular basis

	Name	Form/level of bargaining	Number of employees covered by bargaining	Consultation	Consultation pattern
RO	ANCONAV	Engaged in collective bargaining[3]	n.a.	Yes	On a regular basis
SE	Teknikföretagen	MEB (sectoral/branch)	~5,900**	No	–
	IKEM	MEB (sectoral/branch)	~100**	No	–
	TMF	MEB (sectoral/branch)	~500**	No***	–
SK	ZSP SR	MEB (sectoral/branch)	~100	Yes	On a regular basis
UK	SSA	Not involved in collective bargaining	–	Yes	On an ad hoc basis
	SMI	Not involved in collective bargaining	–	Yes	On a regular basis

Notes: n.a. = information not available

** Through direct applicability.*

*** Estimates.*

**** The union notes that it would have been if there were sector-related consultations, but there have been no relevant ones.*

[1] Only through its umbrella organisation FENAME, which is directly involved in MEB. In the case of FENAME, 50,000 employees are covered by bargaining. Also FENAME is consulted on a regular basis. Eurofound's Portugal correspondent identified FENAME as a relevant sector-related employer organisation in Portugal. According to SEA Europe, FENAME is not specifically sector-related and was hence deleted from this table.

[2] GICAN is member of the UIMM which negotiates agreement in the metal sector.

[3] No information on the form of collective bargaining.

[4] Gesamtmetall is an umbrella organisations and, as such, not directly involved in collective bargaining. Its regional member Nordmetall is involved in collective bargaining. Gesamtmetall takes on a coordinating role in collective bargaining.

[5] Not involved in collective bargaining, only in an advisory capacity.

[6] Not involved in collective bargaining, only by its umbrella organisation DI.

Source: Eurofound's network of European correspondents, 2016

Table A10: Collective bargaining and consultation – corporate members

	Name	Involved in sector-related collective bargaining	Covered by collective agreement, form/level	Number of employees covered by bargaining	Consultation	Consultation pattern
BE	Port of Antwerp	No	–	–	Yes	n.a.
	Promat International	No	–	–	No	–
ES	Navantia	Yes	SEB	n.a.	–	–
SI	Elan d.o.o	Yes	SEB (company level)	n.a.	n.a.	n.a.

Note: n.a. = information not available

Source: Eurofound's network of European correspondents, 2016

Table A11: Organisation names and abbreviations – trade unions

	Abbreviation	Full organisation name in English
AT	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
	PRO-GE	Production Trade Union
	GBH	Construction and Woodworkers Union
BE	ABVV-FGTB Metaal – FGTB Metallos	Socialist union, metal sector
	ACV-CSC Metea	Christian trade union, metal sector
	ACLVB-CGSLB	Liberal trade union
BG	Podkrepa SFMM	Syndical Federation of Machine-builders and Metalworkers PODKREPA
	Syndicate 'Korabostroitel' – Varna	Trade Union 'Korabostroitel' – Varna
CY	OVIEK-SEK	Federation of Industrial Workers
	SEMMHK-PEO	Cyprus Metalworkers, Mechanics and Electricians' Trade Union
DE	IG Metall	Metalworkers' Union
DK	CO-industri	The Central Organisation for Industrial Employees in Denmark
EL	P.O.E.M.	Panhellenic Federation of Labour Metal Workers
	SENE	Elefsina Shipyards Workers Union
	Somatio Ergazomenon Nafpigion Skaramaga 'Triaina'	Skaramangas Shipyards Workers Union, 'Triaina'
ES	Industria CCOO	Industry Federation of the Trade Union Confederation of Workers' Commissions

	Abbreviation	Full organisation name in English
	MCA-UGT	Metal, Construction and Related Activities of the General Workers' Confederation
	CSIF	Independent Civil Servants Trade Union
	Industria-CIG	Federation of Industry of the Galician Inter-union Confederation
	ELA Industry and Construction	Basque Workers' Solidarity Industri and Construction
	LAB Sindikatua Industry	Abertzales Workers Commission Industry Federation
	CAT	Autonomous Union of Workers
FI	Sähköliitto	Finnish Electrical Workers´ Union
	Pro-liitto	Trade Union Pro
	Metalliliitto	Finnish Metalworkers' Union
	Puuliitto	Finnish Woodworkers' Union
	TEAM	Industrial Union TEAM
FR	FGMM-CFDT	General Federation of Mining and Metal Industry – French Democratic Confederation of Labour
	FEAE-CFDT	French Democratic Confederation of Labour – Federation of the States' Establishments and Arsenals
	FCE-CFDT	Chemical Energy Federation – French Democratic Confederation of Labour
	CFE-CGC Métallurgie – FCMTM	French Confederation of Professional and Managerial Staff/ General Confederation of Professional and Managerial Staff – Metal Industry Federation
	CGT FNTE Etat	National Federation of State Employees – General Confederation of Labour
	Union CGT FTM Métallurgie	Workers' Federation of the Metal Industry – General Confederation of Labour
	FNIC CGT	National Federation of the Chemical industries
	FO Métaux	Metal Industries' Federation FO
	FO Construction	Building, Construction, Woodworking and assimilates FO federation
	Fédération BATI-MAT-TP CFTC	BATI-MAT-TP CFTC Federation
HR	SMH	Metal Workers' Trade Union Of Croatia – Industrial Trade Union
HU	Vasas Szakszervezet	Hungarian Metal Workers Trade Union
IT	Feneal Uil	National Federation of Construction and Wood Workers
	Filca Cisl	Italian Federation of Construction Workers
	Fillea Cgil	Italian Federation of Wood and Construction Workers
	UILM	Union of Italian Metalworkers
	FIM	Federazione italiana metalmeccanici

	Abbreviation	Full organisation name in English
	FIOM	Federation of White and Blue-Collar Metalworkers
LT	VLGTDPS	Administration of Western Shipyard Group and Territorial Trade Union of Western Shipyard Employees
	KLRDPS	Trade Union of AB Klaipedos laivu remontas
LV	ŪTAF	Federative Water Transport Workers Union
MT	GWU	General Workers' Union
NL	CNV	National Federation of Christian Trade Unions
	De Unie	The Union
	FNV	Federation of Dutch Trade Unions
	VHP2	Association of Higher Personnel 2
PL	NSZZ Solidarność	Metalworkers' Secretariat of of NSZZ Solidarność (National Section of Shipbuilding Industry)
	WZPGM	Free Trade Union of Maritime Economy Workers
PT	SIMA	Union of the Metal Industries and Related
	SINDEL	Sindicato Nacional da Industria e da Energia
	FETESE	Federation of Service Workers' Unions
	SQTD	Union of Draughtsmen
	SERS	Trade Union of Engineers
RO	SLNavalistul	Navalistul Free Trade Union
SE	Sveriges Ingenjörer	Swedish Association of Graduate Engineers
	Ledarna	Confederation of Executives and Managerial Staff
	IF Metall	The Union of Metal Workers
	GS	The Swedish Union of Forestry, Wood and Graphical Workers
	SEKO	The Union of Service and Communication Employees
	Unionen	Unionen
SI	Trade union Elan	Trade union of company Elan d.o.o.
SK	OZ Kovo	Metal Trade Union Association
UK	GMB	–
	Prospect	Prospect
	UCATT	Union of Construction, Allied Trades and Technicians
	Unite	Unite the Union

Source: Eurofound's network of European correspondents, 2016

Table A12: Organisation names and abbreviations – employer organisations

	Name	Full name in English
AT	FMMI	Federal Organisation of Mechanical and Plant engineering,

	Name	Full name in English
		Steel construction and Metalware Production
	BIT	Federal Organisation of the Joiners and Wood-designing Crafts
BE	Agoria	Agoria
BG	BBCMB	Bulgarian Branch Chamber – Machine Building
	BULNAS	Bulgarian National Association of Shipbuilding and Ship repair
CZ	APL	Czech Boating Industry Association
DE	Gesamtmetall	Employer Associations for the Metal and Electrical Industry
	VSM	German Shipbuilding and Ocean Industries Association
DK	Danske Maritime	Danish Maritime
EL	HEMEXPO	Hellenic Marine Equipment Manufacturers and Exporters
ES	PYMAR	Small and Medium Shipbuilders Association
	ACLUNAGA	Cluster of the Galician Naval Sector
	The Basque Maritime Forum	The Basque Maritime Forum
FI	Teknologiateollisuus / Meriteollisuus	The Federation of Finnish Technology Industries / Finnish Marine Industries
	Kemianteollisuus	The Chemical Industry Federation of Finland
	Veneteollisuuden työnantajat	The Finnish Boat-builders Employer Association
FR	GICAN	French marine industry Group
	UIMM	Union of Metal Industries and Trades
	FIN	French Nautical Industries Federation
HR	HBJ	Croatian Shipbuilding Corporation
	UMB	Association of Boatbuilding Industry
	ZPBO	Croatian Marine Equipment Manufacturers
IT	Federlegno	The Italian Federation of Wood and Furniture Enterprises
	ASSONAVE	ASSONAVE – National Association of Italian Shipbuilders and Ship repairers
	Federmeccanica	Federation of Italian metalworking industry
	ANCPL	National Association of Industrial cooperatives
	AGCI Produzione e Lavoro	AGCI – Industry and work
	Confcooperative – Federlavoro e servizi	Confcooperative – Work and services Federation
	CNA Produzione	National Confederation of Crafts and Small and Medium Enterprises – Manufacture
	CLAAI	The Confederation of Free Italian Artisan Associations
	CONFIMI Impresa meccanica	Confederation of the Italian Manufacturing Industry and Private Enterprises – Metalworking Business
	CONFIMI Impresa Legno	Confederation of the Italian Manufacturing Industry and

	Name	Full name in English
		Private Enterprises: Wood, Furniture and Design
LT	LLSRA	Association of Lithuanian Shipbuilders and Ship repairers
NL	FME	Association FME (Federation for Metal and Electrotechnical Industry)
	Metaalunie	Royal Metal Union
	NMT	Netherlands Maritime Technology
PL	Forum Okrętowe	Association of Polish Maritime Industries
PT	AIN	Association of Naval Industries
	FENAME	National Metal Federation
RO	ANCONAV	Romanian Shipbuilders' Association
SE	Teknikföretagen	The Association of Swedish Engineering Industries
	IKEM	Innovation and Chemical Industries in Sweden
	TMF	Trä- och möbelföretagen
SK	ZSP SR	Association of Mechanical Engineering of the Slovak Republic
UK	SSA	Shipbuilders and Ship repairers Association
	SMI	Society of Maritime Industries

Source: Eurofound's network of European correspondents, 2016

Table A13: Organisation names and abbreviations – corporate members

	Name	Full name in English
BE	Port of Antwerp	Port of Antwerp
	Promat International	Promat International
ES	Navantia	Navantia
SI	Elan d.o.o	Company Elan, production of sporting goods, d.o.o.

Source: Eurofound's network of European correspondents, 2016

Table A14: Bipartite and tripartite bodies in the shipbuilding sector, 2016

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
BG	Sectoral Council for Tripartite Cooperation in Machinery Construction (for example, shipbuilding) Ministry of Economy	Tripartite	Statutory	Podkrepa SFMM; NTUF 'Metal-Electro'	BBCMB
	Sectoral Council for Tripartite Cooperation in a healthy and safe working conditions Ministry of Economy	Tripartite	Statutory	Podkrepa SFMM; NTUF 'Metal-Electro'	BBCMB
	Sectoral Council for Tripartite Cooperation in a labour and social security relations Ministry of Economy	Tripartite	Statutory	Podkrepa SFMM; NTUF 'Metal-Electro'	BBCMB
ES	Cluster Marítimo Español – organises conferences, communicates governments' and political parties' joint positions (trade unions and employer organisations) and carries out general lobbying activities	Bipartite (ports authorities)	Agreement	UGT and CCOO	Most of the shipbuilding companies and other sea sector companies
	Social Dialogue Board of the region of Galicia – general social dialogue issues related to the sector	Tripartite	Agreement	CCOO, UGT and CIG	ACLUNAGA and ASIME (metal sector)
FR	Comité stratégique filière navale	Tripartite	Statutory (Decree)	Fédération Générale des Mines et de la Métallurgie CFDT Fédération des Cadres, de la Maîtrise et des Techniciens de la Métallurgie CFE-CGC Fédération des Travailleurs de la Métallurgie CGT Fédération Confédérée FO de	GICAN, FIN, UIMM, SER

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
				la Métallurgie	
	Commission Paritaire Nationale de l'Emploi de la métallurgie – Collective bargaining, professional training	Bipartite	Statutory and agreement	Fédération Générale des Mines et de la Métallurgie CFDT Fédération des Cadres, de la Maîtrise et des Techniciens de la Métallurgie CFE-CGC Fédération Nationale CFTC des Syndicats de la Métallurgie et Parties Similaires Fédération des Travailleurs de la Métallurgie CGT Fédération Confédérée FO de la Métallurgie	UIMM
	Observatoire prospectif et analytique des métiers et qualifications de la métallurgie – employment and skills forecasts	Bipartite	Agreement	Fédération Générale des Mines et de la Métallurgie CFDT Fédération des Cadres, de la Maîtrise et des Techniciens de la Métallurgie CFE-CGC Fédération Nationale CFTC des Syndicats de la Métallurgie et Parties Similaires Fédération des Travailleurs de la Métallurgie CGT Fédération Confédérée FO de la Métallurgie	UIMM
IT	Comitato Paritetico Nazionale lapidei e arredamento (CPNLA) –	Bipartite	Agreement	Feneal Uil Filca Cisl Fillea Cgil	Federlegno

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
	stone and furniture industries National Paritarian Committee				
	San.Arti – supplementary healthcare fund for workers of the craft sector	Bipartite	Agreement	Cgil, Cisl, Uil	Confartigianato, CNA, Casartigiani, Claai
	Organismo Bilaterale Nazionale – National paritarian institution	Bipartite	Agreement	FIM Cisl UILM Uil	Federmeccanica Assistal
	Osservatorio Paritetico nazionale sull'industria metalmeccanica – national paritarian observatory on metalworking industry	Bipartite	Agreement	FIM Cisl UILM Uil	Federmeccanica Assistal
	Osservatorio nazionale per la cooperazione – national observatory for the cooperation	Bipartite	Agreement	Cisl, Cgil, Uil	AGCI, Legacoop, Confcooperativ e
NL	Pensioenfonds van de Metalektro (PME), pension fund	Bipartite	Agreement	CNV, De Unie, FNV, VHP2	FME
	Stichting Arbeidsmarkt en Opleiding in de Metalektro (A+O), fund for education and training	Bipartite	Agreement	CNV, De Unie, FNV, VHP2	FME
	PMT, pension fund	Bipartite	Agreement	CNV, De Unie, FNV	Metaalunie
PL	Zespół Trójstronny ds. Przemysłu Stoczniowego (Tripartite Team on Shipbuilding Industry) – scope is to work out joint statements in relation to issues important for State policy and the interests of employees and employers within the sector	Tripartite	Ministerial decision on the basis of joint request by trade unions and employer organisatio n	Sekcja Krajowa Przemysłu Okrętowego NSZZ ‘Solidarność’ Wolny Związek Zawodowy Pracowników Gospodarki Morskiej, Zakładowy Związek Zawodowy Pracowników Stoczni Gdansk SA, Międzyzakładowa Organizacja Związkowa	Gdański Związek Pracodawców Polski Północnej Forum Okrętowe – Związek Pracodawców

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
				Wolnego Związku Zawodowego Pracowników Gospodarki Morskiej 'STOCZNIOWIEC', Międzyzakładowa Komisja Pracowników H. Cegielski – Poznan SA 'Metalowcy' Związek Zawodowy Inżynierów i Techników Stoczni Gdansk SA, Zakładowa Organizacja Związkowa 'Solidarność 80' Stoczni Szczecińskiej Nowa, Związek Zawodowy Inżynierów i Techników w H. Cegielski – Poznan SA	
SK	Economic and Social Council (HSR) – all relevant issues on employment, working conditions and social policy	Tripartite	Statutory by law	OZ Kovo representing KOZ SR	ZSP SR representing RUZ SR
	Industry bipartite – public policy issues on the industry, including the shipbuilding	Bipartite	Agreement of members	OZ Kovo, Integrated Trade Union Association (IOZ) and Trade Unions of Mines, Geology and Oil Industry Workers (OZ PBGN)	ZSP SR, Slovak Electro-Mechanical Association (SEA), Association of the Automotive Industry SR (ZAP SR), Association of Metallurgy, Mining Industry and Geology SR (ZHTPG) and Association of Construction Entrepreneurs of Slovakia (ZSPS)

	Name and scope of activity	Character	Origin	Trade union organisations represented	Employer organisations represented
UK	SEMTA – skills and training	Tripartite	Statutory	Unite represented on board.	No shipbuilding organisations represented on board, though individual employers, including BAE Systems, are represented. SEMTA 'works with' SSA and SMI.

Source: Eurofound's network of European correspondents, 2016

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