

Industrial relations

Representativeness of the European social partner organisations: Sea fisheries sector



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Research carried out prior to the UK's withdrawal from the European Union on 31 January 2020, and published subsequently, may include data relating to the 28 EU Member States. Following this date, research only takes into account the 27 EU Member States (EU28 minus the UK), unless specified otherwise.

This report presents the results of research conducted prior to the outbreak of COVID-19 in Europe in February 2020. For this reason, the results do not take account of the outbreak.

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Country codes

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

Introduction

The aim of this representativeness study is to identify the relevant national social partners – the trade unions and employer organisations – in the sea fisheries sector and show how they relate to the European-level organisations representing employees and employers in the sector. The report is divided into three parts: an overview of the specificities and the employment trends in the sea fisheries sector; an analysis of the social partner organisations in the 28 Member States;¹ and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

In this section, the objectives of the study are presented along with a brief introduction to the chosen methodology. The context of this study is the European social dialogue for the sea fisheries sector, which was initially established as a joint committee in 1974 and transformed into a European sectoral social dialogue committee (ESSDC) in 1998.

ESSDC for the sea fisheries sector

In line with the development of the European Common Fisheries Policy (CFP) in the 1970s, the first consultative committee for the sea fisheries sector was initially established through the Commission decision of 25 July 1974 (74/441/EC) as the Joint Committee on Social Problems in Sea Fishing (European Commission, 1974). This committee was to assist the Commission in the ‘formulation and implementation of the Community social policy aimed at improving and harmonizing the living and working conditions in sea fishing’. The committee was initially composed of 42 members, 21 representing employer organisations² and 21 representing employee associations.³ The original body was eventually transformed into the current ESSDC with Decision 98/500/EC of 20 May 1998 (European Commission, 1998). The ESSDC was to be consulted on developments at community level that have social implications, and it was assigned the responsibility of developing and promoting social dialogue at sectoral level.

Since its establishment, the ESSDC for the sea fisheries sector has worked on the integration of organisations from central and eastern European countries, health and safety issues, working conditions, restructuring, training and lifelong learning. As part of the efforts to promote health and safety in the sector, in 2007 the ESSDC launched the *Handbook for the prevention of accidents at sea*

¹ As the research for this report took place prior to the United Kingdom’s (UK) withdrawal from the European Union on 31 January 2020, findings refer to the current EU27 and the UK, and these countries are referred to as the EU28.

² In 1974, the employer organisations were *Europêche* (the Association of National Organisations of Fishing Enterprises in the European Union) and the special committee for fishing cooperatives in the EU (the General Committee for Agricultural Cooperation in the European Union, COGECA).

³ The trade unions involved in the sea fisheries joint committee in 1974 were the Committee of Transport Unions in the Community (ITF); the European Transport Committee; and the European Committee for the Coordination of Fishermen’s Trade Unions (European Commission, 1974).

and the safety of fishermen, which aimed to reduce the high number of accidents at sea (European Commission, 2010).

The launch in 2007 of the EU's Integrated Maritime Policy for the 21st century was a very important development. This covered governance, surveillance and research aspects, as well as combining economic and sustainable development, like maritime spatial planning of offshore renewable energy sources and specific strategies for different regional maritime basins (European Commission, 2010, p. 70). Over the years, the ESSDC has monitored the social aspects of the European Common Fisheries Policy (CFP) and the accompanying funding programmes⁴ and provided joint opinions at crucial moments in the decision-making process.

As sea fishing can take place in international waters or in areas outside the jurisdiction of the states where vessels are registered, international law is important (Gallizioli, 2018, p. 29). In June 2007, to provide the necessary legal instrument to ensure decent working conditions and health and safety provisions in the sea fishing sector, the International Labour Organization (ILO) adopted the Work in Fishing Convention (no. 188). This ILO convention is currently being implemented in the EU, following the agreement reached on 21 May 2012 by the sectoral social partners in the ESSDC, which demanded implementation of the agreement through a Council directive. The agreement was signed by the General Committee for Agricultural Cooperation in the European Union (COGECA), the European Transport Workers' Federation (ETF) and *Europêche* (the Association of National Organisations of Fishing Enterprises in the European Union); it led to the adoption of the implementing Council Directive 2017/159 of 19 December 2016 (Council of the European Union, 2017).

The ESSDC has been working effectively and has produced a number of joint documents. The social dialogue texts database held by the European Commission contains 56 documents dated between 2014 and 2019 for sea fisheries. These include the agreement on the implementation of the ILO Work in Fishing Convention (no. 188) with the request for adoption by Council decision, 3 declarations, 48 joint opinions, 2 tools and 2 procedural texts. Table 1 presents the joint texts produced by the sea fisheries ESSDC from 2014 to 2019. The most recent joint texts cover training and certification, safety measures, social clauses and abuses of migrant workers, as well as more technical issues of fisheries policies, such as the landing obligation (which requires all catches of regulated commercial species on board to be landed and counted against quotas), tariff quotas, regulation of fishing activities and state aid in the sector.

⁴ In the period from 1994 to 2006, funding was provided through the Financial Instrument for Fisheries Guidance. This was followed by the European Fisheries Fund from 2007 to 2013 and the European Maritime Fisheries Fund from 2014 to 2020 (European Commission, 2018). A new funding programme is being proposed for the period 2021 to 2027 (European Commission, undated-a).

Table 1: Joint documents produced by the ESSDC for sea fisheries, 2014–2019

Title	Type	Date
Joint resolution on the landing obligation	Joint opinion	11 November 2019
EU social partners' position on EU autonomous tariff quotas for certain fishery products for the period 2019–2021	Joint opinion	29 October 2018
Training and certification of fishers	Joint opinion	27 September 2018
Safety measures for non-SOLAS ships operating in polar waters/IMO Maritime Safety Committee (MSC), 3–7 December – 100th session	Joint opinion	27 September 2018
Joint resolution on the situation of migrant workers in Thailand	Joint opinion	16 February 2018
SSDC-F position on the EC proposal to revise the EU Fisheries Control Regulation, amending Regulation (EC) No. 1224/2009	Joint opinion	31 January 2018
EU social partners keep up momentum on safety and labour conditions in fishing	Joint opinion	9 November 2017
Abuses of migrant fishers in a part of the Union's fishing sector	Declaration	10 May 2017
EU social partners in the fisheries sector recommendations for the trilogue discussions on the Regulation on the sustainable management of external fishing fleets, repealing Council Regulation (EC) No 1006/2008	Joint opinion	24 February 2017
Declaration, on the occasion of the 32nd session of the COFI (Committee on Fisheries, Food and Agriculture Organization of the United Nations), on promoting decent work and safety of life and property at sea in the fishing sector	Joint opinion	3 July 2016
Letter to the national administrations of EU Member States on the implementation into EU legislation of the ILO Work in Fishing Convention (C188)	Joint opinion	26 May 2016
Declaration on 'The promotion of the ratification of ILO work in fishing Convention by EU Member States'	Joint opinion	14 April 2016
Agreement on social clause to be inserted in sustainable fishing partnership agreements	Joint opinion	30 November 2015
Position paper on Commission proposal on fishing opportunities for 2015 in the Atlantic and the North Sea (COM(2014)670)	Joint opinion	28 November 2014
Position paper on the proposal for a regulation laying down a prohibition on driftnet fisheries	Joint opinion	21 October 2014
Joint letter on social responsibilities in sea-fisheries; the role of the EU	Joint opinion	15 September 2014
Joint letter to Lowri Evans, Director-General of Directorate-General Maritime Affairs and Fisheries (DG MARE)	Procedural rules	1 September 2014
Statement on the EU 'de minimis' aid in the fishery and aquaculture sector	Joint opinion	24 April 2014
Comments on the EU maritime security strategy	Joint opinion	24 April 2014
Social clause in the Fisheries Partnership Agreements	Joint opinion	9 April 2014

Source: European Commission, undated-b

Objectives of the study

Representativeness studies are conducted for three reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is a criterion for setting up an ESSDC or for participation in one of them.
- Representativeness means having the capacity to negotiate agreements that can lead to an implementation by Council decision as provided by Article 155 of the TFEU.

Representativeness is defined by the European Commission Decision on the establishment of Sectoral Social Dialogue Committees promoting the dialogue between the social partners at European level (98/500/EC) (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative EU social partner organisation:

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

To assess representativeness, this study first identifies the relevant national social partner organisations in the sea fisheries sector before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both national and European levels. The study includes only those organisations whose membership domain is classed as 'sector related': that is, trade unions and employer organisations that have members in the sector and which are involved in sector-related collective bargaining and/or consultations on sector-related policies. In terms of territorial coverage, the study includes 22 Member States and the UK. The Member States not included in this study are the five landlocked countries: Austria, Czechia, Hungary, Luxembourg and Slovakia.

Definitions and methodology

The methodology applied in this study is linked to the criteria identified in European Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity (European Commission, 1998). Each of these criteria are defined successively here.

As far as **sector-relatedness** is concerned, in agreement with the social partners and the European Commission, the demarcation of the sea fisheries sector has been established as covering NACE Rev.

2 code 03.11 (Marine fishing; see Table 2).⁵ The related marine aquaculture subsector (NACE Rev. 2 code 03.21) has been excluded from this study, although it is part of the broader marine fisheries sector. Therefore, for the purpose of this study, sea fisheries shall be considered as including only fishing at sea (small-scale coastal fishing, large-scale fishing and distant water fishing).

Table 2: Demarcation of the sea fisheries sector based on NACE codes

03.11	Marine fishing
03.21 – excluded from this study	Marine aquaculture

Source: NACE Rev. 2

Domain patterns for membership of an organisation are shown in Table 3. Where the membership domains of trade unions and employer organisations strictly correspond to this demarcation of the sector, we call this ‘congruence’. If the membership domain of an organisation goes beyond the sea fisheries sector as described here, we call that an ‘overlap’. ‘Sectionalism’ occurs when an organisation covers a part of the sea fisheries sector and nothing else, whereas ‘sectional overlapping’ is when an organisation covers part of the sea fisheries sector and organises in other sectors too.

Table 3: Domain patterns of the membership of an organisation

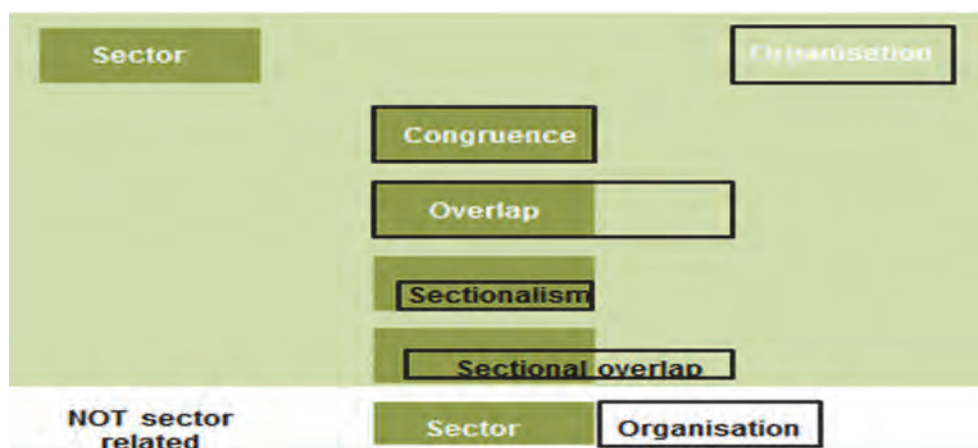
Domain pattern	Domain of organisation within the sector Does the domain of the union/employer organisation embrace potentially all employees/enterprises in the sea fisheries sector?	Domain of organisation outside the sector Does the union/employer organisation potentially represent employees/enterprises outside the sea fisheries sector?
Congruence	Yes	No
Overlap		Yes
Sectionalism	No	No
Sectional overlap		Yes

Source: Eurofound

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

⁵ NACE Rev. 2 is the ‘statistical classification of economic activities in the European Community’. For the demarcation of a specific sector, reference is made to one or a set of NACE codes, usually at four digits, the most detailed level of economic activities. In this case, a single four-digit NACE code has been used.

Figure 1: Four types of sector-relatedness



Source: Eurofound

Membership constitutes another important aspect of representativeness. Two dimensions of membership will be considered. First, the geographical coverage of the EU-level organisations (the number of Member States that the EU-level trade union/employer organisation has affiliates in) and, second, the organisational density of the national affiliates. Moreover, it is also important to consider whether the EU-level players organise most of the national-level players, or at least the most significant ones, in terms of density and involvement in sector-related collective bargaining and/or policymaking.

The **organisational capacity** of the European social partners is analysed in terms of their ability to act on behalf of their members and to conclude binding agreements or commit to actions that can be implemented or monitored EU-wide through the support of their affiliates. For this assessment of the capacity to negotiate, it is necessary to analyse:

- the **actors** and their institutional objectives and decision-making structures, as provided in their statutes
- the expected **outcomes of their actions** (for instance, whether their institutional mission includes the possibility to negotiate and come to agreements with other parties)
- the **processes** through which the organisations obtain mandate, support and approval from their member organisations in the negotiation process

The involvement of the affiliates' members in national-level collective bargaining (or in social dialogue about sector-related policies) is important, as it shows that the affiliates have a mandate to negotiate on behalf of their members (at least at the national level, which could then translate into a mandate to negotiate at EU level). Where a mandate for European negotiations is in place, either implicitly or explicitly, it allows for negotiations to take place at European level that could potentially result in binding agreements or the drafting of European autonomous agreements, which require implementation by the social partners at the national level in line with their respective practices and traditions. The ability to act autonomously for the implementation of EU-wide agreements is an important contribution to the effectiveness of the ESSDC.

Finally, representativeness also depends on the structures, resources and capacity of organisations to mobilise the active participation of their members, to aggregate different interests of member organisations and to act autonomously at the European level. **Effective participation in the ESSDC meetings** is assessed in terms of presence at the meetings in the two years prior to the publication of this report. Use of internal structures within the European organisations to prepare ESSDC meetings and discuss social affairs can increase efficiency and ensure that more organisations feel represented than just those that participate directly in the meetings.

Data collection and quality control

Representativeness studies combine a top-down and a bottom-up approach to identify national-level sector-related organisations in the sea fisheries sector as defined by NACE code 03.11. The top-down approach identifies all sector-related affiliates of the European associations ETF, Europêche and COGECA. The bottom-up approach looks for organisations in the countries covered by this study that are involved in collective bargaining and social dialogue related to the sea fisheries sector, and it also takes into account their membership in European-level organisations.

Unless cited otherwise, this study draws on the country studies provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates were provided rather than leaving a question blank. Thus, quantitative data may stem from three sources; namely:

- official statistics and representative surveys
- administrative data, such as membership figures provided by the respective organisations
- estimates, expert opinions and assessments made by the Network of Eurofound Correspondents or by representatives of the respective organisations

Other sources used in this report include the European social dialogue texts database, the articles of association of the EU-level organisations and data from *The 2019 annual economic report on the EU fishing fleet* (STECF, 2019b).

Quality assurance

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of preparing this study.

First, combining the top-down and the bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents between April 2019 and September 2019. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to make revisions to them between September 2019 and November 2019.

An overview of the information in this study was made available in January 2020 to the European social partners to allow their affiliates to double-check the content and comment. In addition, the national members of the Eurofound Management Board were invited to check the consistency of

the information in this report to ensure that the bottom-up approach included all the relevant sector-related organisations from their respective countries. As different social partner organisations can view the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information of other organisations representing similar membership, this process involves an element of mutual control and recognition.

Draft versions of the overview report were shared as of January 2020 with the ETF, Europêche and COGECA as well as with the European Commission, for feedback and comments. The final report, taking into account these comments, was evaluated and approved in March 2020 by Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission, as well as the European-level sectoral social partners identified in the report. After this formal evaluation, the report was edited and prepared for publication in the second half of 2020.

Structure of the report

The report consists of three main parts, beginning with a brief summary of the background and employment specificities of the sea fisheries sector. The second part presents an analysis of the relevant social partner organisations in Member States and the UK. The third part considers the representative associations at European level.

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

1. Economic background and employment trends in the sector

Sea fisheries are a key component of the primary sector (agriculture, forestry and fishery) in the EU. Most Member States and the UK have a marine fishing fleet, although the importance of fishing varies widely between countries. The EU and relevant countries have long-established policies in this field, and international regulations have been developed for the preservation of fishing stocks both within and outside the EU. Social dialogue has a key role in the sector.

In 2017, some 150,000 fishers – around 107,000 full-time equivalents (FTEs) – were employed in the EU sea fisheries sector (STECF, 2019b, p. 27 and Tables 3–2 and 3–17). Spain had the largest sea fisheries workforce, corresponding to 22.6% of the EU sectoral workforce. Italy hosted 16.8% of the EU sectoral workforce and Greece, 14.8%. Other countries with significant sectoral employment were Croatia, France, Portugal and the UK.

On average, 0.07% of the total workforce in the countries covered in this study are employed in the sea fisheries sector. A relatively high incidence of sectoral employment is found in Croatia, Greece and Malta (0.5%) and Estonia (0.3%).

The large majority of those employed in the sector are male (96%), and 86% are country nationals. Those employed in the sector are most often educated to lower secondary level (52%) or upper secondary level (24%). Only 4% of those employed in the sector completed tertiary education. Education level was unknown for 20% of the sector's workforce (STECF, 2019b).

Sea fisheries sector

The size of the sea fisheries sector varies considerably across countries. Since landlocked countries (Austria, Czechia, Hungary, Luxembourg and Slovakia) do not have any marine fishing fleet, they are excluded from this study. The sector has particular features in different countries. For instance, Spain has the highest gross tonnage (which refers to the storage capacity of vessels⁶), Italy has the highest engine power of vessels and Greece has the largest number of vessels (Table 4).

Table 4: EU fishing fleet, 2008 and 2017

Country	Vessels			Total gross tonnage			Engine power		
	Number		Share of EU28 (%)	Thousand tonnes		Share of EU28 (%)	Thousand kilowatts		Share of EU28 (%)
	2008	2017	2017	2008	2017	2017	2008	2017	2017
EL	17,138	14,977	18.1	89	71	4.5	507	427	6.8

⁶ However, 'gross tonnage' does not refer exclusively to storage capacity; hence there are reservations within the industry as to the use of gross tonnage as a measure for curbing fishing capacity.

Country	Vessels			Total gross tonnage			Engine power		
	Number		Share of EU28 (%)	Thousand tonnes		Share of EU28 (%)	Thousand kilowatts		Share of EU28 (%)
	2008	2017		2008	2017		2008	2017	
IT	13,613	12,250	14.8	196	157	10.0	1,142	983	15.8
ES	11,424	9,147	11.1	460	335	21.3	1,030	784	12.6
PT	8,571	7,921	9.6	106	88	5.6	385	345	5.5
HR	–	7,559	9.1	–	46	2.9	–	356	5.7
FR	7,373	6,512	7.9	193	174	11.1	1,027	970	15.5
UK	6,628	6,199	7.5	208	187	11.9	842	762	12.2
FI	3,242	3,224	3.9	16	16	1.0	170	175	2.8
DK	2,886	2,205	2.7	73	69	4.4	263	206	3.3
IE	2,022	2,022	2.4	70	64	4.0	193	189	3.0
BG	2,548	1,881	2.3	8	6	0.4	66	55	0.9
EE	965	1,595	1.9	18	14	0.9	46	45	0.7
DE	1,825	1,382	1.7	69	66	4.2	161	139	2.2
SE	1,471	1,232	1.5	42	25	1.6	208	148	2.4
MT	1,125	929	1.1	11	6	0.4	85	71	1.1
NL	822	849	1.0	156	133	8.5	351	316	5.1
PL	832	834	1.0	41	28	1.8	99	76	1.2
CY	1,179	804	1.0	5	3	0.2	50	37	0.6
LV	841	675	0.8	38	27	1.7	61	48	0.8
SI	181	170	0.2	1	1	0.0	11	9	0.1
RO	437	155	0.2	2	1	0.1	6	6	0.1
LT	218	144	0.2	50	40	2.6	60	46	0.7
BE	100	71	0.1	19	14	0.9	61	45	0.7
EU28	85,441	82,737	100.0	1,872	1,572	100.0	6,824	6,238	100.0

Notes: – = not applicable. Landlocked countries without a marine fishing fleet are not shown in this table (Austria, Czechia, Hungary, Luxembourg and Slovakia). In general, the data refer to the situation of the national fleets on 31 December of the reference year. EU data are extracted from the Community Fishing Fleet Register, which is managed by the Directorate-General for Fisheries and Maritime Affairs. Countries are ordered by number of vessels in 2017.

Source: Eurostat, undated-a

The marine fishing fleets in Member States and the UK can be distinguished according to the level of small-scale coastal fishing, large-scale fishing and distant water fishing. This distinction is associated with different types of enterprise and employment relations. Whereas in small-scale coastal fishing, small enterprises prevail – often run by self-employed fishers, sometimes with the help of family members – large-scale fishing involves larger enterprises with more employees. Table 5 shows the balance between small-scale, large-scale and distant water fishing across Member States and the UK (see Box 1 for definitions).

Table 5: Vessels and employment by type of marine fishing fleet, 2017

	Small scale				Large scale				Distant waters			
	Vessels	Employed (engaged crew)	Of which: Unpaid labour	FTE	Vessels	Employed (engaged crew)	Of which: Unpaid labour	FTE	Vessels	Employed (engaged)	Of which: Unpaid labour	FTE
BE	–	–	–	–	67	357	0	214	–	–	–	–
BG	1,191	1,660	453	490	104	287	32	226	–	–	–	–
CY	728	962	962	517	37	172	34	172	–	–	–	–
DE	736	839	104	534	276	829	247	673	–	–	–	–
DK	926	290	224	214	382	1,016	219	1,429	–	–	–	–
EE	1,557	1,950	1,068	332	30	150	1	128	–	–	–	–
EL	12,588	17,744	13,977	–	849	4,617	985	16,962	–	–	–	–
ES	3,957	9,664	4,448	6,189	4,139	19,697	3,241	128	199	4,965	4	6,051
FI	1,413	1,217	763	154	56	142	22	117	–	–	–	–
FR	4,186	7,005	–	2,054	1,531	5,993	–	4,365	22	543	–	204
HR	5,085	5,290	4,049	217	967	2,600	86	1,449	–	–	–	–
IE	783	1,097	177	844	533	1,965	144	1,764	–	–	–	–
IT	7,346	11,996	8,050	8,599	3,901	13,419	212	11,585	8	84	–	84
LT	62	137	12	38	22	133	–	90	6	196	–	220
LV	196	298	138	120	55	363	–	206	–	–	–	–
MT	624	872	716	459	62	262	58	260	–	–	–	–
NL	179	300	175	70	346	1,849	232	1,653	–	–	–	–
PL	623	1,456	923	1,263	170	929	158	862	2	175	–	160
PT	3,004	7,412	897	2,524	766	7,035	109	5,070	18	259	–	230
RO	111	307	13	22	24	99	7	38	–	–	–	–
SE	680	836	82	275	231	612	78	517	–	–	–	–
SI	69	79	50	53	11	22	9	10	–	–	–	–
UK	3,337	5,390	529	1,558	1,372	6,302	157	5,801	–	–	–	–
Total	49,381	76,801	37,810	26,526	15,931	68,850	6,031	53,719	255	6,222	4	6,949

Note: – = not applicable.

Source: Authors' own compilation based on STECF, 2019

Box 1. Three types of fishing activity

The three main types of fishing activity are defined as follows.

Small-scale coastal fleet (SSCF) – includes all vessels under 12 metres using static gears. According to the DCF [EU Data Collection Framework] gear definitions these include: ‘drift and/or fixed netters’, ‘pots and/or traps’, ‘hooks’, ‘passive gears only’, ‘other passive gears’, ‘polyvalent passive gears only’, ‘active and passive gears’.

Large-scale fleet (LSF) – segment includes all vessels over 12 metres using static gears and all vessels using towed gears operating predominately in EU waters. According to the DCF gear definitions these include: ‘dredgers’, ‘demersal trawlers and/or demersal seiners’, ‘other active gears’, ‘polyvalent active gears only’, ‘purse seiners’, ‘beam trawlers’, ‘pelagic trawlers’.

Distant-water fleet (DWF) – includes EU registered vessels over 24 metres operating in ‘other fishing regions’ including EU outermost regions.

Source: STECF, 2019b, p. 22

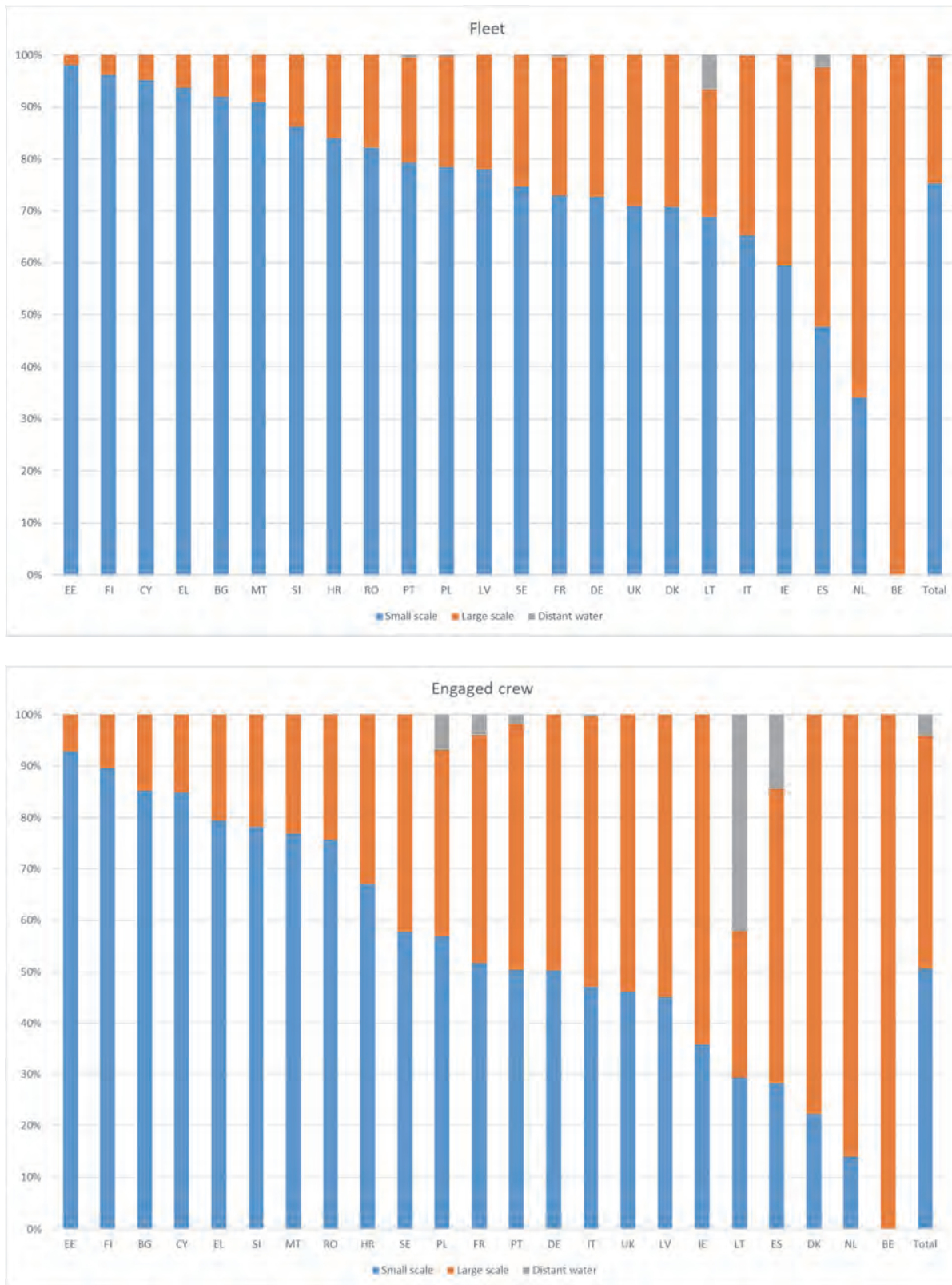
The largest share of the EU fleet (49,381 vessels or 75.3% of the total) and fishers (76,801 or almost 50% of the total) are involved in **small-scale coastal fishing**. This is also the type of fishing where unpaid labour (such as work provided by household collaborators or other people on board, such as retired fishers and fishers without an obligation to pay social contributions (see STECF, 2019a) depending on national regulations) is most common, representing almost 50% of the overall engaged crew (37,810 workers out of 76,801). Vessels are mostly operated by self-employed fishers and a small number of collaborators (the average staffing per vessel is 1.6 persons). Part-time work is prevalent, as indicated by the number of FTEs, which amounts to 34.5% of total engaged workers. **Large-scale fishing** involves 24.3% of vessels and 45% of staff. Unpaid labour is far less common in this category (8.7% of workers), and the average crew is larger (4.3 workers per vessel). Full-time employment is frequent, with FTEs making up 78% of the total engaged crew. **Distant-water fishing** involves a very small fraction of total vessels (0.4%) and some 4% of crew, with practically no unpaid labour (only four workers were reported). The average staffing per vessel is 24.4, and work hours are longer, as indicated by the number of FTEs, which is 12% higher than the overall employed crew.⁷

The top graph in Figure 2 clearly shows that most national fleets are mainly engaged in small-scale coastal fishing. Only a few countries are involved in large-scale fishing, including sometimes in

⁷ Data for FTEs is calculated using a national reference threshold. FTEs, in principle, should not exceed the number of engaged crew (see STECF, 2018, Annex 6). Here the excess of FTEs compared to the number of persons employed, which shows the intensity of work in the distant water segment, is driven by data for Spain (4,965 persons employed and 6,051 FTEs) and Lithuania (196 persons employed and 220 FTEs) (STECF, 2019b, p. 93, Table 3–35).

distant waters. Belgium, the Netherlands and Spain have specialised fleets for this. However, if we consider employment, the picture is more nuanced. The bottom graph in Figure 2 shows that large-scale fishing covers more than 50% of engaged crew in Belgium, Denmark, Ireland, Italy, Latvia, Lithuania, the Netherlands, Spain and the UK. Distant-water fishing is an even more specialised activity. Spain maintains clear leadership in this area: 14.5% of the national sectoral employment in Spain is in this area, which amounts to almost 80% of all EU fishers working in distant waters. Distant-water fishing is a highly relevant activity for Lithuania, although with activity at a much smaller scale (42.1% of national sectoral employment, but only 3.2% of all EU fishers in distant waters). Distant-water fishing is also present in Poland (6.8% of national sectoral employment and 2.8% of all EU fishers in distant waters), France (4.0% and 8.7%), Portugal (1.8% and 4.2%) and Italy (0.3% and 1.4%). Among the countries with the larger sea fishing fleets and workforces, Greece clearly represents a case of small-scale coastal fishing (93.7% of vessels and 84.8% of persons employed) with a high prevalence of unpaid labour (66.1% – only Cyprus and Malta have higher shares of unpaid labour).

Figure 2: Active vessels and employment by type of fishing, 2017 (%)



Source: Authors' own compilation based on STECF, 2019b

It is clear that, in employment terms, the sea fisheries sector is quite small. It has around 150,000 workers across the EU and the UK, and only in Greece, Italy and Spain does it employ over 20,000 people. The key features of the sector – its small size and the presence of a significant share of self-employed fishers – can have an impact on two features of the representation and collective bargaining systems.

First, sector-related trade unions tend to represent workers in other sectors too, or at least in other segments of the fishing or water transport industries. This can also be seen at the EU level, where the ETF is part of the sectoral social dialogue committee. For trade unions, the prevalence of representational overlap (see Chapter 2) often makes the collection of membership data in the sea fisheries sector difficult, since the relevant trade unions may not keep separate records for the sector. On the employers' side, the representational domain is often more focused, and congruence is common (such that the organisation's representational domain corresponds solely to the sea fisheries sector).

Second, the role of collective bargaining is limited by the prevalence of small-scale fishing, self-employed fishers and the small overall workforce. Collective bargaining tends to be well established in the countries with larger overall sectoral employment. Indeed, in a number of cases, social dialogue on sector-related policies seems more developed than collective bargaining, as social partners are actively involved with the government in the discussion about, and possibly design of, sector-related policies. Where this is not linked to collective bargaining, a careful assessment is necessary to establish whether this can be considered as social dialogue.

Employment in the sector

The concentration of the workforce in the sea fisheries sector within a few countries is clearly shown in Table 6. Seven countries account for over 85% of the engaged crew for the EU and the UK, each with over 5% of the total. Spain alone has almost one-quarter of the overall workforce (22.6%), while Italy and Greece each have around 15% of EU sea fishers (16.8% and 14.8%, respectively). They are followed by Portugal (9.7%), France (8.9%), the UK (7.7%) and Croatia (5.2%).

The sea fisheries sector is comparatively small, and its share of the national workforce is always low. It represents 0.068% of the total employment in the countries covered here, and it never reaches 1% of national employment in any of the Member States. The incidence of sea fisheries in national employment tends to be higher in smaller countries. Malta has the largest share of the national workforce in sea fisheries, with 0.502%, followed by Greece (0.478%), Croatia (0.437%), Estonia (0.316%), Portugal (0.296%), Cyprus (0.272%) and Spain (0.152%).

The overall incidence of unpaid labour is 28.8%, and this highlights the importance of household collaborators as well as self-employed fishers with no obligations to pay social insurance and follow national regulations (for instance, this figure includes retired fishers in Croatia, whereas in Cyprus all fishers working in the coastal inshore fishery are considered as unpaid labour (see STECF, 2019a)). This type of work is particularly important in Cyprus (87.8%), Malta (68.3%), Greece (66.1%), Slovenia (58.4%), Finland (57.8%), Croatia (52.4%) and Estonia (50.9%). It is also above the average level in Poland (42.2%), Denmark (33.9%) and Italy (32.4%).

Table 6: Employment in the sea fisheries sector, 2017

	Employment (engaged crew) (number)	Percentage of EU sea fisheries workforce (%)	Percentage of national workforce (%)	Unpaid labour (number)	Percentage of employment (%)
ES	34,326	22.6	0.152	7,693	22.4
IT	25,499	16.8	0.101	8,262	32.4
EL	22,471	14.8	0.478	14,863	66.1
PT	14,705	9.7	0.296	1,006	6.8
FR	13,540	8.9	0.046	–	–
UK	11,692	7.7	0.036	686	5.9
HR	7,890	5.2	0.437	4,135	52.4
IE	3,062	2.0	0.134	321	10.5
PL	2,560	1.7	0.015	1,081	42.2
NL	2,149	1.4	0.024	408	19.0
EE	2,100	1.4	0.316	1,069	50.9
BG	1,947	1.3	0.059	485	24.9
DE	1,668	1.1	0.004	351	21.0
SE	1,449	1.0	0.028	160	11.0
FI	1,359	0.9	0.052	785	57.8
DK	1,306	0.9	0.045	443	33.9
CY	1,134	0.7	0.272	996	87.8
MT	1,134	0.7	0.502	774	68.3
LV	661	0.4	0.070	138	20.9
LT	466	0.3	0.033	12	2.6
RO	406	0.3	0.005	20	4.9
BE	357	0.2	0.007	–	–
SI	101	0.1	0.010	59	58.4
Total	151,982	100.0	0.068	43,747	28.8

Notes: – = not applicable. Countries are ordered according to number of engaged crew. Green shading indicates the top countries in terms of numbers of engaged crew and share of the EU sea fisheries workforce. Yellow shading indicates countries in which the percentage of national workforce is above the EU average.

Source: Authors' own compilation based on STECF, 2019b

In recent years, the overall number of vessels and employed workers in the sea fisheries sector has declined (Table 7). Between 2012 and 2017, the total number of vessels fell slightly (by 1%), while the workforce decreased by 5.6% and FTEs by 8.0%. The steeper decrease in FTEs suggests that the

sector has lost part of the more active workforce. At national level, Croatia stands out in terms of the substantial increase in both vessels and crew (by 98.3% and 60.9%, respectively), while FTEs went down by almost one-third (by 32.5%). This indicates that growth in Croatia took place mostly in the less intensive segments of the industry and mostly in small-scale fisheries.⁸ Other countries point to a different trend of relative consolidation, as overall employment has decreased more than FTEs. Among the Member States with the largest fleets and workforce, this pattern is seen for Italy and Greece.

Table 7: Trends in the sea fisheries sector, 2012 and 2017

	Vessels (number)		Employment – engaged crew (number)		FTE (number)		Vessels	Employment (engaged crew)	FTE	Percentage of EU sectoral employment in 2017 (%)
	2012	2017	2012	2017	2012	2017	Percentage change between 2012 and 2017 (percentage points)			
ES	10,544	9,356	34,399	34,326	30,302	29,203	-11.3	-0.2	-3.6	22.6
IT	12,942	12,270	28,292	25,499	20,693	20,268	-5.2	-9.9	-2.1	16.8
EL	16,063	14,985	27,559	22,471	23,945	20,542	-6.7	-18.5	-14.2	14.8
PT	8,399	7,950	16,754	14,705	9,241	7,823	-5.3	-12.2	-15.3	9.7
FR	7,144	6,970	14,140	13,540	7,196	6,623	-2.4	-4.2	-8.0	8.9
UK	6,435	6,267	12,445	11,692	8,563	7,358	-2.6	-6.1	-14.1	7.7
HR	4,211	8,349	4,904	7,890	2,467	1,665	98.3	60.9	-32.5	5.2
IE	2,106	1,954	3,121	3,062	2,709	2,608	-7.2	-1.9	-3.7	2.0
PL	790	844	2,601	2,560	2,487	2,484	6.8	-1.6	-0.1	1.7
NL	740	736	2,040	2,149	1,720	1,723	-0.5	5.3	0.2	1.4
EE	917	1,589	2,046	2,100	540	460	73.3	2.6	-14.8	1.4
BG	2,387	1,897	1,541	1,947	544	716	-20.5	26.3	31.6	1.3
DE	1,564	1,397	1,752	1,668	1,372	1,207	-10.7	-4.8	-12.0	1.1
SE	1,358	1,209	1,686	1,449	935	793	-11.0	-14.1	-15.2	1.0
FI	3,359	3,217	1,437	1,359	354	271	-4.2	-5.4	-23.4	0.9
DK	2,019	1,726	1,532	1,306	1,558	1,644	-14.5	-14.8	5.5	0.9
CY	1,082	799	1,301	1,134	810	689	-26.2	-12.8	-14.9	0.7
MT	1,060	935	1,234	1,134	410	719	-11.8	-8.1	75.4	0.7
LV	356	324	643	661	353	326	-9.0	2.8	-7.6	0.4
LT	151	149	648	466	516	348	-1.3	-28.1	-32.6	0.3

⁸ As part of the accession negotiations, 3,500 vessels in the category of small-scale artisanal coastal fisheries, which mostly operate for personal needs, were included in the commercial fleet in 2015, when the most significant one-off increase in the fleet took place (+79%) (STECF, 2019b, p. 259). Employed workers increased substantially the following year (+53% between 2015 and 2016), possibly as a delayed impact of the increase in the number of vessels. FTEs have shown a constant decrease over the period, with a small increase in 2016 only, when most of the growth in employment took place.

	Vessels (number)		Employment – engaged crew (number)		FTE (number)		Vessels	Employment (engaged crew)	FTE	Percentage of EU sectoral employment in 2017 (%)
	2012	2017	2012	2017	2012	2017	Percentage change between 2012 and 2017 (percentage points)			
RO	261	155	471	406	39	60	-40.6	-13.8	53.8	0.3
BE	87	73	376	357	312	214	-16.1	-5.1	-31.4	0.2
SI	180	172	106	101	63	63	-4.4	-4.7	0.0	0.1
Total	84,155	83,323	161,028	151,982	117,129	107,807	-1.0	-5.6	-8.0	100.0

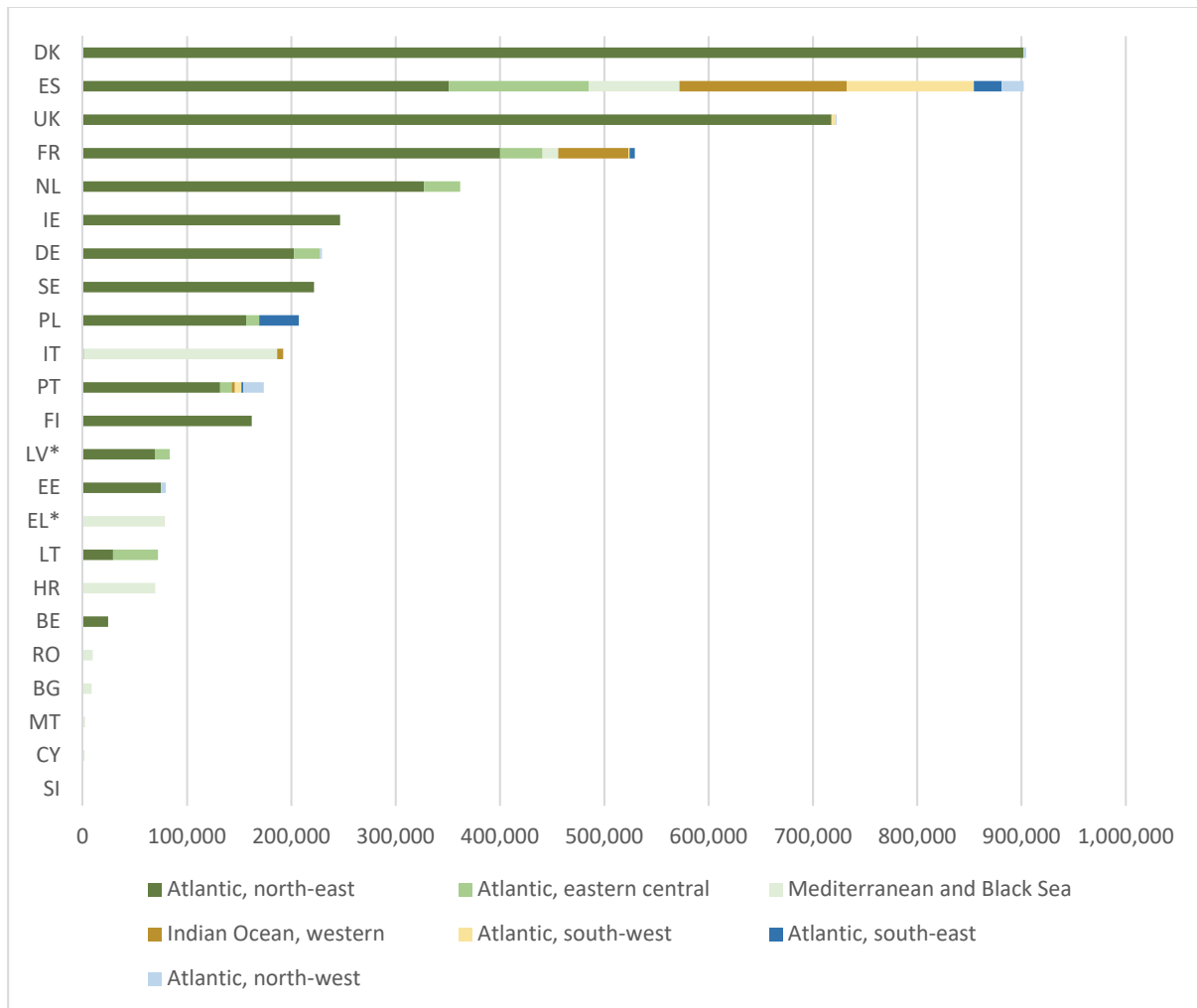
Note: Countries are ordered according to number of engaged crew in 2017.

Source: Authors' own compilation based on STECF, 2019b

Areas and volumes of catches

This study focuses on employment and industrial relations and, therefore, takes the size of the workforce as the key reference variable. To assess the relevance of the sector, it is important to also look at the size and value of the catch (Figure 3). In this respect, in 2017 Denmark accounted for the largest volume of catches among the countries (with an increase of 34.9% over 2016), followed closely by Spain. France and the UK had the next highest volume of catches. Greece and Italy, two countries with high sectoral employment, recorded far lower catches. This is in line with the predominance of small-scale fishing in the Mediterranean Sea. If we consider the economic value of catches (Figure 4), Denmark accounted for €438 million and Spain accounted for more than €2 billion. Italy's catch was valued at €934 million.

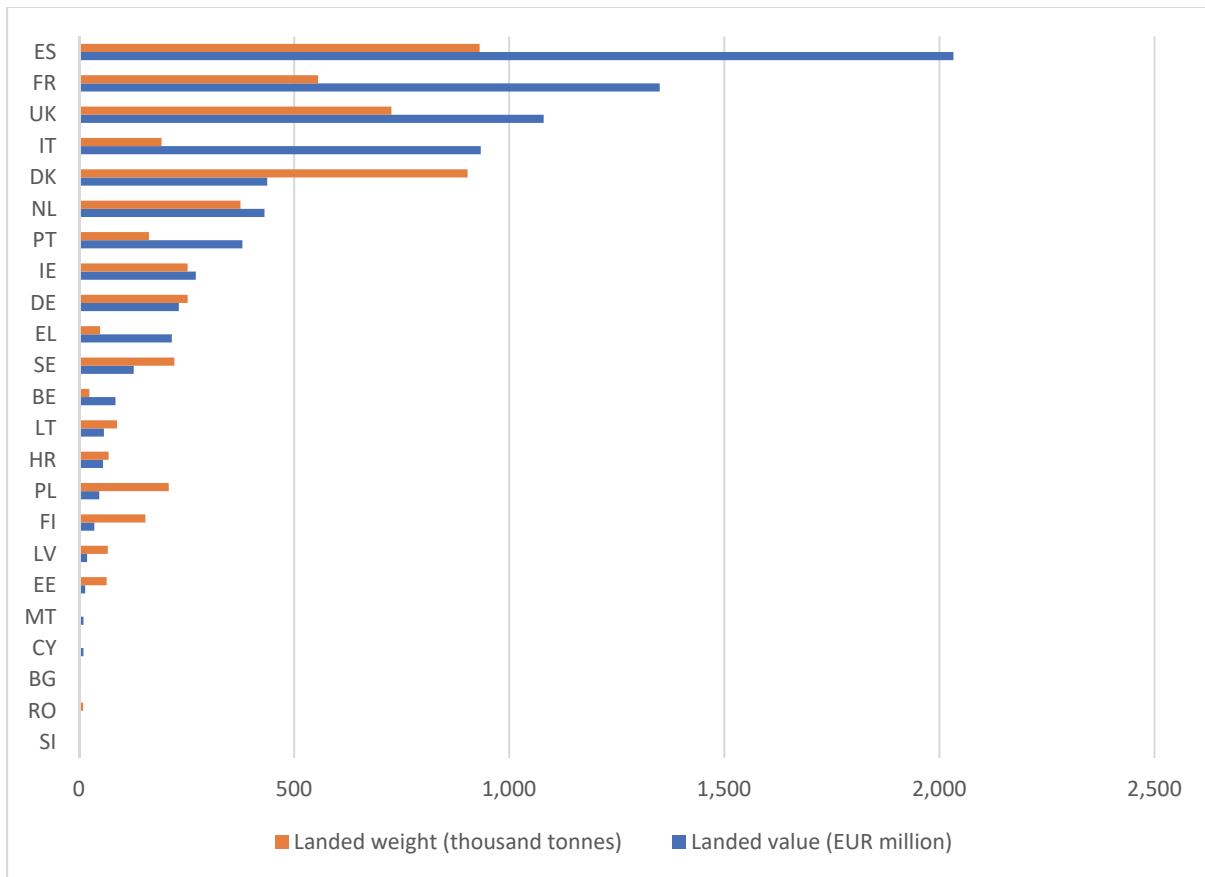
Figure 3: Catches by fishing area, 2017 (tonnes live weight)



Note: *2015 data is used for: Greece – Atlantic, eastern central and Indian Ocean, western; Latvia – Atlantic, eastern central.

Source: Eurostat, undated-b

Figure 4: Landed weight and landed value of catches, 2017 (thousand tonnes/€ million)



Source: Eurostat, undated-b

2. National level of interest representation

The structure of the sea fisheries sector, especially in terms of business type and size, has a significant impact on the national level of interest representation, as well as on the presence and importance of collective bargaining and the involvement of social partners in policymaking.

The high prevalence of micro firms, often run by self-employed workers with the help of family members or a limited number of employees, hinders unions, which are mostly active in the segments of the sector where larger fishing vessels are operating (like in distant water fishing) or in the countries where sea fishing is more developed. The incidence of self-employed workers, who run their own enterprises, means that business associations⁹ are more common than trade unions. These conditions reduce the scope for collective bargaining as a means of regulating employment relations, whereas the presence and importance of fishing policies at both EU and national levels support the spread of consultations with the social partners – mostly business associations, due to the structure of representation illustrated above. The Network of Eurofound Correspondents identified 31 sector-related trade unions in 11 countries, and 57 sector-related employer organisations and business associations in 21 countries (Table 8).

Table 8: Number of sector-related organisations per country, 2019

Number of sector-related organisations	Countries with respective number of trade unions in the sea fisheries sector overall	Countries with respective number of employer organisations/business associations in the sea fisheries sector overall
Landlocked countries (not included in this study)	AT, CZ, HU, LU, SK	
0	BG, CY, EE, EL, FI, HR, LT, LV, MT, RO, SE, SI*	HR, SI
1	DE, DK, IE, NL	BE, DE, FI, MT, PL
2	UK	BG, DK, ES, PT, RO, UK
3	BE, ES, PL	EE, EL, LV, NL
4		CY, IE, LT
5	FR, IT	FR, SE
6	PT	IT

Notes: *This lack of sector-related trade unions involves some of the member organisations of the ETF: the two members for Bulgaria (STSB-FTTUB and the Seamen's Syndicate-SSB) and the Danish HK Privat were not included in this study as they do not appear to be sector related: they do not represent workers in the sector, they do not engage in sector-related collective bargaining and they do not participate in sector-related policy consultations.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

⁹ Unlike employer organisations that are either involved in collective bargaining or affiliated to a European social partner organisation, business associations only represent the trade/business interests of their member companies and have no role in social dialogue or arrangements for setting wages or working conditions.

In just over half of the 23 countries covered in this study, no sector-related trade unions are present. This means that no trade unions are representing workers in the sector, engaging in sector-related collective bargaining or participating in sector-related policy consultations. This group of countries comprises countries with diverse industrial relations traditions, including some Nordic countries. It also includes Greece, which alone represents around one-fifth of the EU sea fisheries in terms of number of vessels (see Table 7). However, the countries with sector-related trade unions account for more than two-thirds of overall EU sectoral employment (72.9%) and more than half of all vessels (59.7%).

The picture is different for employer organisations and business associations. In most EU countries with sea fisheries, enterprises are organised into various associations. Only Croatia and Slovenia do not have this form of representation. As a consequence, in the case of employers, the coverage as a share of the EU sea fishing fleet and employment is at least 90%.

The number of national social partners in each Member State ranges from one to six on both sides. In Germany there is one single trade union and employer organisation. France and Italy have a more varied system of representation, with five trade unions each and five and six employer organisations, respectively.

Sector coverage, sector-relatedness and organisational density of trade unions

Trade unions in the sea fisheries sector tend to cover the whole sector, with a few exceptions and qualifications (Table 9). In terms of vessel size, 24 organisations out of 31 organise crew working on all types of vessel. A few trade unions do not organise workers on small vessels (the three Polish unions and the Rail Maritime and Transport Union, RMT, in the UK). This is essentially because small vessels are mostly run by self-employed workers with no employees. Some trade unions do not recruit among workers of the largest vessels (the French SNMP-CFTC, the Irish SIPTU and the Italian UGL Agroalimentare).

As for the employees of cooperatives and the self-employed, 16 trade unions have members among them. In four countries, trade unions do not organise cooperatives and self-employed (seven unions altogether): Germany (where it was reported that no cooperatives are active in sea fisheries), the Netherlands, Poland and the UK (no information was available in these three countries about the presence of cooperatives in sea fisheries). One further trade union in Spain does not organise cooperatives (FSC-CC.OO).

The self-employed are excluded from union membership in Belgium (three trade unions), Denmark (one trade union), Ireland (one trade union), the Netherlands (one trade union), Poland (three trade unions) and the UK (two trade unions). This was also the case in four union organisations in other countries (FEETS-FO in France, UGL Agroalimentare in Italy, Sindepescas in Portugal and FSC-CC.OO in Spain).

Table 9: Sector coverage of trade unions in the sea fisheries sector, 2019

	Organisation	Vessels <12m (SSCF)	Vessels 12–24m (LSF)	Vessels >24m (DWF)	Employees of cooperatives	Self- employed	Domain*
BE	BTB-UBOT						SO
BE	ACV Transcom						O
BE	ACLVB-CGSLB						O
BG	No sector-related trade unions						
DE	ver.di				No cooperatives	Potentially	O
DK	3F						O
EE	No sector-related trade unions						
EL	No sector-related trade unions						
ES	FeSMC-UGT						O
ES	FSC-CC.OO						O
ES	FGAMT-CIG						SO
FI	No sector-related trade unions						
FR	FEETS-FO						O
FR	FGTE-CFDT/UM- CFDT						O
FR	SNMP-CFTC						SO
FR	FNSM-CGT						SO
FR	FFSPM-M						SO
HR	No sector-related trade unions						
IE	SIPTU						SO
IT	FAI-CISL						O
IT	FLAI-CGIL						O
IT	UILA-Pesca-UIL						O
IT	UGL Agroalimentare						O
IT	Confisal-Pesca						C
LT	No sector-related trade unions						
LV	No sector-related trade unions						
MT	No sector-related trade unions						
NL	CNV Vakmensen						O
PL	KSM MiR NSZZ 'Solidarność'						O
PL	FZZ MiR						O
PL	NSZZ Szkuner						SO
PT	FSSP						C
PT	UGT-Pescas						C
PT	Sindepescas						O

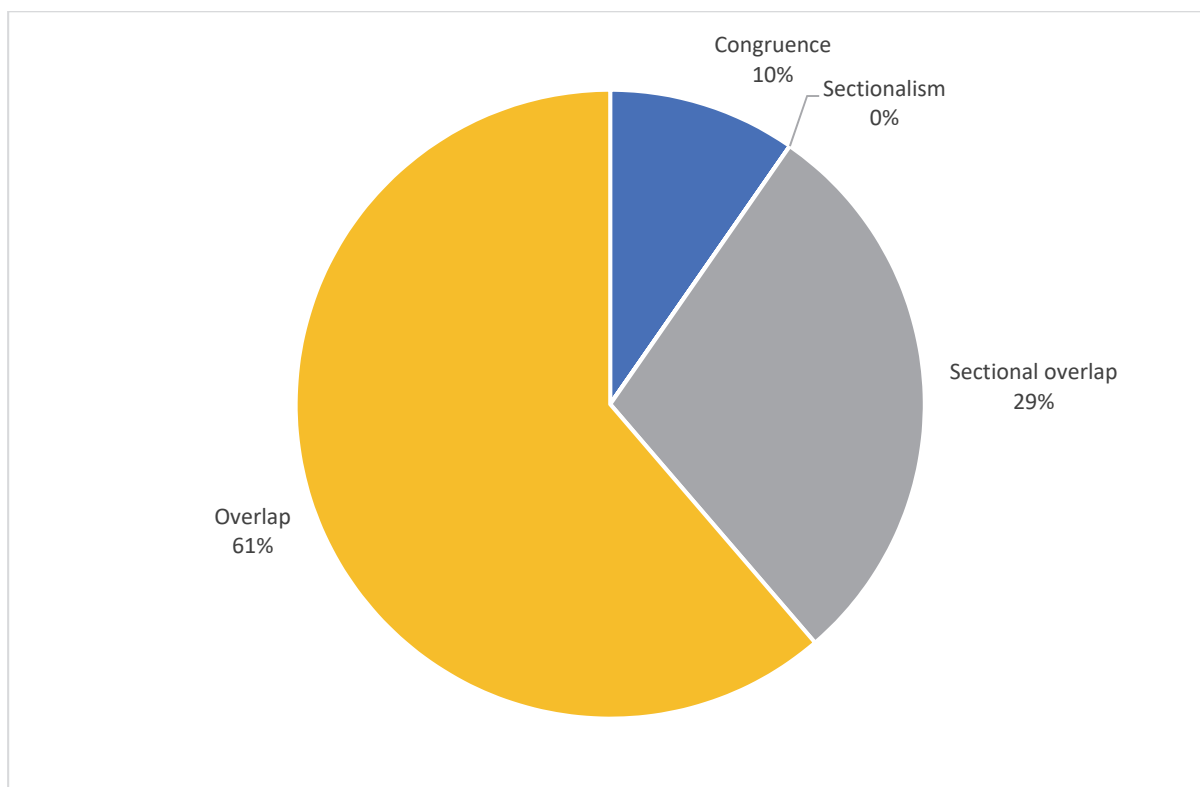
PT	SITEMAQ						O
PT	SLPMPAA						SO
PT	Oficiaismar						SO
RO	No sector-related trade unions						
SE	No sector-related trade unions						
SI	No sector-related trade unions						
UK	Nautilus International (UK branch)						O
UK	RMT						O

Notes: *C = congruence; O = overlap; SO = sectional overlap. The green shading indicates a positive response; the pink shading indicates a negative response. Members of the ETF are marked in bold.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Trade unions are assessed on how they relate to the sector according to the four patterns of sector-relatedness. Figure 5 shows that the most common representational domain is overlap (61%), followed by sectional overlap (29%) and congruence (10%). Sectionalism is not present for any of the trade unions.

Figure 5: Type of sector-relatedness of trade unions in the sea fisheries sector, 2019 (%)



Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 10 indicates the pattern of sector-relatedness for the trade unions included in this study. Nineteen trade unions have an overlapping representational domain, whereas nine show a sectional

overlap (i.e. they cover part of sea fisheries plus other activities).¹⁰ In the case of overlap, the trade unions are active in the sea fisheries sector and represent all workers in the sector, as well as employees in other sectors. The latter may include neighbouring activities, such as aquaculture (like UILA-Pesca-UIL in Italy and KSM MiR NSZZ 'Solidarność' in Poland) and sea transport (FNSM-CGT in France), but it can also extend to general transport and communication (like ACV Transcom in Belgium), the agro-industry sector (FAI-CISL and FLAI-CGIL in Italy) and the service sectors (ver.di in Germany). The pattern of sectional overlap is typical of occupational unions covering specific types of job (such as blue-collar workers, white-collar workers and managers), as well as territory-based unions (such as the Galician FGAMT-CIG in Spain), which extend their representational domain beyond sea fishing. In this group, NSZZ Szkuner is a special case, as it is an enterprise-level union, which has members from all positions in the company, including some of the 35 sea fishers. Three trade unions organise the sea fishing sector only (congruence), while no union represents part of the sector exclusively (sectionalism).

Table 10: Membership domain of trade unions in the sea fisheries sector

Country	Congruence	Sectionalism	Sectional overlap	Overlap
BE			BTB-UBOT	ACV Transcom, ACLVB-CGSLB
DE				ver.di
DK				3F
ES			FGAMT-CIG	FeSMC-UGT, FSC-CC.OO
FR			SNMP-CFTC, FNSM-CGT, FFSPM-M	FEETS-FO, FGTE-CFDT/UM-CFDT
IE			SIPTU	
IT	Confsal-Pesca			FAI-CISL, FLAI-CGIL, UILA-Pesca-UIL, UGL Agroalimentare
NL				CNV Vakmensen
PL			NSZZ Szkuner	KSM MiR NSZZ 'Solidarność', FZZ MiR
PT	FSSP, UGT-Pescas		SLPMPAA, Oficiaismar	Sindepescas, SITEMAQ
UK				Nautilus International (UK branch), RMT

Notes: Members of the ETF are marked in bold. Members of the ETF are marked in bold.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

¹⁰ It should be underlined that national trade unions with broad and overlapping representational domains can be and usually are affiliated to multiple European-level federations, depending on the different activities they cover. In this study, only the European affiliations covering the sea fisheries sector are taken into consideration.

Table 11 shows the organisational density of the trade unions covered by this study, by country. The presence of overlapping representation reduces the chance of obtaining data on sector-related membership, as larger trade unions may be unable to separate their membership according to the various economic activities they cover. However, we have collected membership data for 19 sector-related trade unions out of 31 (61.3%). With this word of caution, available data suggests a trade union membership in the sea fisheries sector of almost 42,000 workers: that is, 27.5% of the sectoral employment for the EU as a whole. For the eight countries with trade union representation, the overall density is 37.7% (based on a total of 110,864 employees).

Due to the partial coverage of membership data and the lack of information about some of the largest trade unions, like in France and Portugal, it is difficult to assess the overall level of unionisation and the differences across countries and organisations. However, unionisation appears to be significant in the sea fisheries sector.

Table 11: Organisational density of trade unions in the sea fisheries sector, 2019

Country	Employment – engaged crew (number)	Trade union members (number)	Trade unions (number)	Density (%)
BE	357	587	1 out of 3	About 100%
BG	1,947	No unions	N/R	–
CY	1,134	No unions	N/R	–
DE	1,668	N/A	0 out of 1	N/A
DK	1,306	600	1 out of 1	45.9
EE	2,100	No unions	N/R	–
EL	22,471	No unions	N/R	–
ES	34,326	17,000	3 out of 3	49.5
FI	1,359	No unions	N/R	–
FR	13,540	102	1 out of 5	0.8
HR	7,890	No unions	N/R	–
IE	3,062	N/A	0 out of 1	N/A
IT	25,499	21,000	4 out of 5	82.4
LT	466	No unions	N/R	–
LV	661	No unions	N/R	–
MT	1,134	No unions	N/R	–
NL	2,149	800	1 out of 1	37.2
PL	2,560	550	2 out of 3	21.5
PT	14,705	1,200	4 out of 6	8.2
RO	406	No unions	N/R	–
SE	1,449	No unions	N/R	–
SI	101	No unions	N/R	–
UK	11,692	N/A	0 out of 2	N/A
Total	151,982	41,839		27.5

Notes: N/A = not applicable; N/R = not relevant; – = not possible to calculate.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Trade union involvement in collective bargaining or social dialogue

In the previous section, the sector-relatedness and membership strength of trade unions were considered, while this section looks at their involvement in collective bargaining and policymaking. Table 12 shows whether trade unions are involved in multi- or single-employer collective bargaining (single-employer bargaining covers only the workforce of the employer, whereas multi-employer bargaining generally covers all member organisations of the employer organisations that are party to an agreement), along with the share and number of workers covered by such agreements. It should be noted that this table is based on estimates that have either been provided by members of the Network of Eurofound Correspondents or inferred from general information about the level of collective bargaining coverage (particularly where such coverage is near universal) and systems for the extension of collective agreements. Whereas collective bargaining is not present everywhere, consultations with trade unions take place in all countries, either regularly or on an ad hoc basis.

Table 12: Involvement in collective bargaining and consultation on sector-related policies by the 31 trade unions in the sea fisheries sector

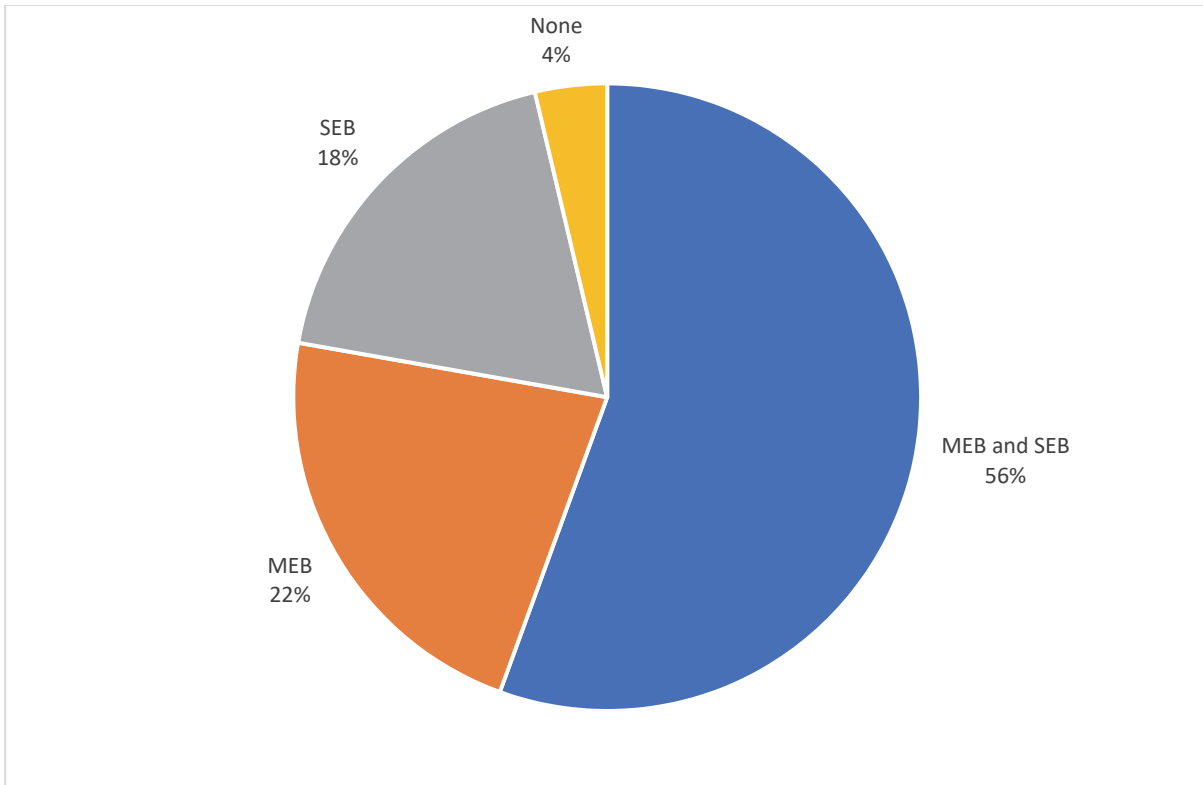
	SRCB*, %	Organisation	EU affiliation	Number of members	MEB*	SEB*	Consultation
BE	Yes 100%	BTB-UBOT	ETF	587	Yes	Yes	Regularly
		ACV Transcom	ETF	N/A	Yes	Yes	Regularly
		ACLVB-CGSLB	ETF	N/A	Yes	Yes	Regularly
DE	No	ver.di	ETF	N/A	Discontinued	No	Ad hoc
DK	Yes 100%	3F	ETF	600	Yes	No	Ad hoc
ES	Yes 100%	FeSMC-UGT	None	8,000	Yes	Yes	Regularly
		FSC-CC.OO	ETF	4,500	Yes	Yes	Regularly
		FGAMT-CIG	None	4,500	No	Yes	Never
FR	Yes 100%	FEETS-FO	ETF	N/A	Yes	Yes	Regularly
		FGTE-CFD/UM-CFD	ETF	N/A	Yes	Yes	Regularly
		SNMP-CFTC	ETF	102	Yes	Yes	Regularly
		FNSM-CGT	ETF	N/A	Yes	Yes	Regularly
		FFSPM-M	None	N/A	Yes	Yes	N/A
IE	No	SIPTU	ETF	N/A	No	No	N/A
IT	Yes 100%	FAI-CISL	ETF	6,000	Yes	Yes	Regularly
		FLAI-CGIL	ETF	6,000	Yes	Yes	Regularly
		UILA-Pesca-UIL	ETF	6,300	Yes	Yes	Regularly
		UGL Agroalimentare	None	2,200	Yes	No	Regularly
		Confisal-Pesca	None	N/A	Yes	Yes	Regularly
NL	Yes 100% (trawling)	CNV Vakmensen	ETF	800	Yes	No	Regularly

PL	Yes (only at company level) 1%	KSM MiR NSZZ 'Solidarność'	ETF	330	No	Yes	Ad hoc
		FZZ MiR	ETF	320	No	Yes	Ad hoc
		NSZZ Szkuner	None	N/A	No	Yes	Never
PT	Yes 23–44%	FSSP	None	600	Yes (4–8%)	Yes	Ad hoc
		UGT-Pescas	None	100	Yes (13–24%)	No	Ad hoc
		Sindepescas	None	400	No	Yes (6–12%)	Ad hoc
		SITEMAQ	None	100	Yes	No	Ad hoc
		SLPMPAA	None	N/A	Yes	N/A	N/A
		Oficiaismar	ETF	N/A	No	No	N/A
UK	No	Nautilus International (UK branch)	ETF	N/A	No	No	Ad hoc
		RMT	ETF	N/A	No	No	Ad hoc

Notes: *SRCB = sector-related collective bargaining, covering both multi-employer collective bargaining (MEB) and single-employer collective bargaining (SEB). N/A = not applicable. Members of the ETF are marked in bold.
Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Figure 6 shows that almost all sector-related trade unions are involved in some form of collective bargaining. If we consider the countries where some form of sector-related collective bargaining takes place (therefore excluding Germany, Ireland and the UK), the majority of trade unions (56%) take part in both multi-employer and single-employer collective bargaining, while 22% engage exclusively in multi-employer bargaining and 18% exclusively in single-employer bargaining. Only one of the unions in countries where negotiations take place (or 4%) is not involved in any form of collective bargaining in sea fishing (the Portuguese *Oficiaismar*). The pattern of trade union involvement in collective bargaining follows the national models in most cases, with a prevalence of multi-employer bargaining, often supplemented by company-level bargaining. Polish trade unions are only involved in single-employer bargaining, and this is also the case for one union in Spain (FGAMT-CIG) and one in Portugal (Sindepescas).

Figure 6: Involvement of trade unions in the sea fisheries sector in different forms of collective bargaining, 2019 (%)

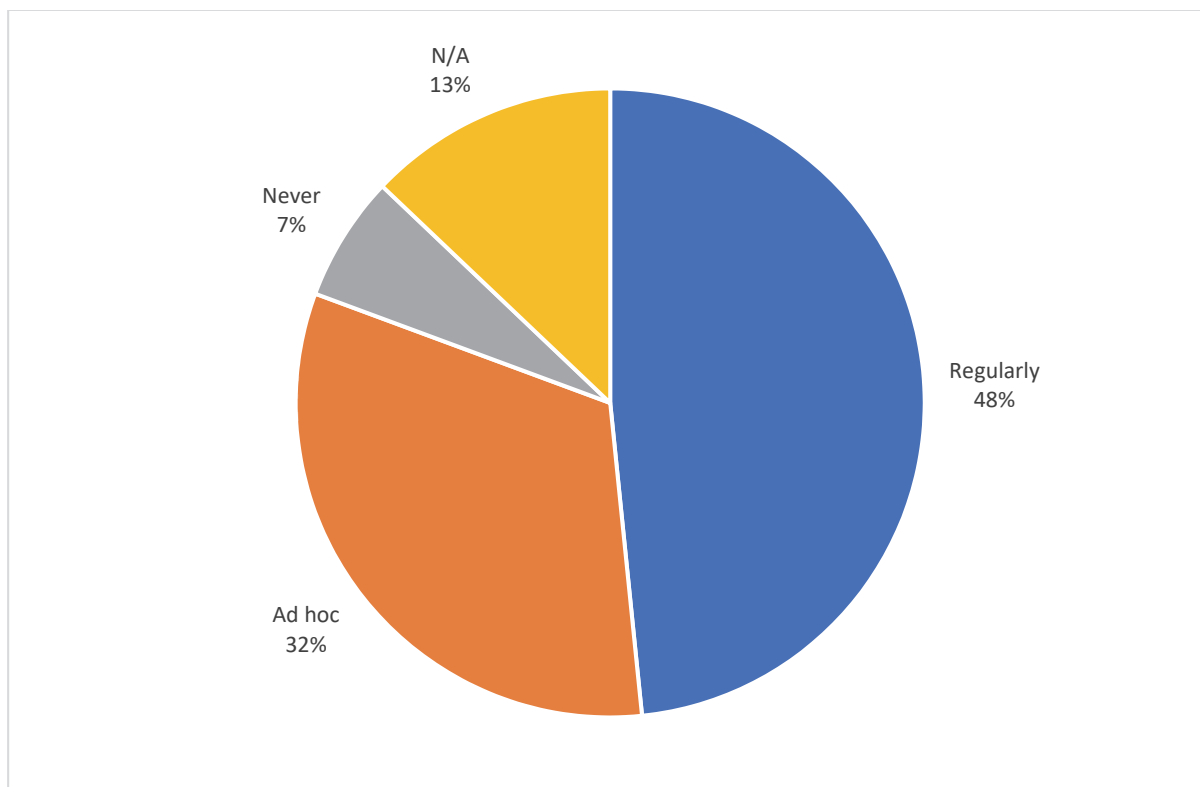


Notes: *n = 27 – trade unions in Germany, Ireland and the UK are not included. MEB = multi-employer collective bargaining; SEB = single-employer collective bargaining.*

Source: *Network of Eurofound Correspondents' national contributions to this study, 2019*

Consultation between government and trade unions about sector-related issues involves 80% of the 31 organisations covered by this study (Figure 7). Consultation takes place regularly with 48% of the unions and on ad hoc basis with 32%. Two trade unions (7%) are never consulted, since they are active only at company level (one, the Polish NSZZ Szkuner, is actually a company union, while the other is the Spanish FGAMT-CIG, which only covers Galicia).

Figure 7: Involvement of trade unions in the sea fisheries sector in different forms of policy consultation, 2019 (%)



Note: $n = 31$.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Sector-relatedness and membership strength of employer organisations

As mentioned above, employer organisations and business associations tend to be more specialised to better reflect the interests of different segments of the sector (Table 13). Therefore, overlap and sectional overlap are less common. When associations cover activities outside the sea fisheries sector, this is often in closely related areas, such as aquaculture or freshwater fishing. There are also limited examples of organisations covering the primary sector in broader terms. However, sometimes employer organisations cover only specific types of fishing (small scale, large scale or distant waters) or enterprises (like cooperatives or artisanal firms). This makes sectionalism a more frequent pattern for employers than for workers.

The small size of the sector and its specificities push the structure of representation in opposite directions. On the union side, the limited number of employees, combined with the general tendency in recent decades towards union mergers, favours the presence of broad representational domains. For the employers, the specificities of the sector promote very focused patterns of representation, especially where business associations prevail over employer organisations and where policy consultation is the core activity as opposed to collective bargaining.

Table 13: Sector-relatedness of national employer organisations in the sea fisheries sector, 2019

Country	Organisation	LEs	SMEs	Territorial coverage	Types of enterprise covered	Coverage outside sea fisheries	Vessels <12m (SSCF)	Vessels 12–24m (LSF)	Vessels >24m (DWF)	Cooperatives	Self-employed	Domain
BE	Rederscentrale	Yes	Yes	All	All	No	Yes	Yes	Yes	N/A	N/A	C
BG	BG Fish (АПРПБФ)	Yes	Yes	All	All	Production, logistics and trade in marine fish	Yes	Yes	Yes	No	No	O
BG	BSSFA (СЧИ)	Yes	Yes	Partial	All	No	No	Yes	Yes	No	No	S
CY	Cyprus Fishers Association of Alongshore Fishing (Categories A and B) (CFAAF)	No	Yes	All	Fishing vessels up to 12m	No	Yes	No	No	N/A	N/A	S
CY	Cyprus Multipurpose Vessels Association (CMVA)	Yes	No	All	Multipurpose fishing vessels over 12m	No	No	Yes	Yes	N/A	N/A	S
CY	Cyprus Professional Fishers Association of Alongshore Small Vessels Fishing of Intermittent Employment (Category C) (CPFAASVFIE)	No	Yes	All	Fishing vessels up to 12m	No	Yes	No	No	N/A	N/A	S
CY	Fisheries Employer Association (FEA)	Yes	No	All	Trawlers over 12m	No	No	Yes	Yes	N/A	N/A	S
DE	DFV	Yes	Yes	All	All	Fishing and aquaculture	Yes	Yes	Yes	Yes	N/A	O
DK	DFPO	Yes	Yes	All	All excluding large pelagic fishing vessels (i.e. more than 40m)	No	Yes	Yes	Yes	Yes	Yes	S

Representativeness of the European social partner organisations: Sea fisheries sector

Country	Organisation	LEs	SMEs	Territorial coverage	Types of enterprise covered	Coverage outside sea fisheries	Vessels <12m (SCCF)	Vessels 12-24m (LSF)	Vessels >24m (DWF)	Cooperatives	Self-employed	Domain
DK	DPPO	Yes	No	All	Only large pelagic fishing vessels (i.e. more than 40m)	No	No	No	Yes	No	Yes	S
EE	EK	Yes	Yes	All	All	Freshwater fishing, aquaculture, processing of fish, selling fish	Yes	Yes	Yes	N/A	N/A	O
EE	EKL	Yes	Yes	All	All	No	Yes	Yes	Yes	N/A	N/A	C
EE	EKPL	Yes	Yes	All	Long-distance fishing	No	No	Yes	Yes	N/A	N/A	S
EL	PEPMA	Yes	Yes	All	Medium-sized coastal vessels	No	No	Yes	Yes	N/A	N/A	S
EL	DASE	No	Yes	Partial	Small coastal vessels	No	Yes	Yes	No	N/A	N/A	S
EL	PEPESA	Yes	Yes	All	No netters/longliners/ trawlers/purse seiners	No	Yes	No	No	N/A	N/A	S
ES	CEPESCA	Yes	Yes	All	All except shellfishing	No	Yes	Yes	Yes	N/A	N/A	S
ES	FNCP	No	Yes	All	Mostly small-scale coastal fishing	Shellfish	Yes	N/A	N/A	N/A	Yes	SO
FI	SAKL	Yes	Yes	All	All	No	Yes	Yes	Yes	N/A	N/A	C
FR	CFDT-Sympa	No	Yes	All	Artisans	Shellfish culture	Yes	Yes	No	No	Yes	SO
FR	FFSPM-PP	No	Yes	All	Self-employed artisans	Shellfish culture	Yes	Yes	No	No	Yes	SO
FR	SNAPP-CFTC	No	Yes	All	Self-employed artisans	Shellfish culture	Yes	Yes	No	No	Yes	SO

Representativeness of the European social partner organisations: Sea fisheries sector

Country	Organisation	LEs	SMEs	Territorial coverage	Types of enterprise covered	Coverage outside sea fisheries	Vessels <12m (SSCF)	Vessels 12–24m (LSF)	Vessels >24m (DWF)	Cooperatives	Self-employed	Domain
FR	SNIMPA-CGT	No	Yes	All	Self-employed artisans	Shellfish culture	Yes	Yes	No	No	Yes	SO
FR	UAPF	Yes	Yes	All	Not self-employed	No	Yes	Yes	Yes	Yes	No	S
HR	No sector-related employer organisations											
IE	ICOS	Yes	Yes	All	Cooperatives	Agribusiness Cooperatives	Yes	Yes	Yes	Yes	No	SO
IE	IFPO	Yes	Yes	All	All	No	Yes	Yes	Yes	N/A	N/A	C
IE	ISWFPO	Yes	Yes	Partial	All	No	Yes	Yes	Yes	N/A	N/A	S
IE	KFO	Yes	Yes	Partial	All	No	Yes	Yes	Yes	N/A	N/A	S
IT	AGCI Agrital	Yes	Yes	All	Cooperatives	Agriculture, forestry, food processing	Yes	Yes	Yes	Yes	N/A	SO
IT	ANAPI Pesca	Yes	Yes	All	All	Freshwater fishing	Yes	Yes	Yes	N/A	N/A	O
IT	Federcoopescas-Confcooperative	Yes	Yes	All	Cooperatives	No	Yes	Yes	Yes	Yes	N/A	S
IT	Federpesca	Yes	Yes	All	Not cooperatives	Fishing, aquaculture, processing and transformation	Yes	Yes	Yes	No	N/A	SO
IT	Legacoop Agroalimentare	Yes	Yes	All	Cooperatives	Agriculture, forestry, food processing	Yes	Yes	Yes	Yes	N/A	SO
IT	UNCI Agroalimentare	Yes	Yes	All	Cooperatives	Agriculture, forestry, food processing	Yes	Yes	Yes	Yes	N/A	SO
LT	KŽJA	Yes	Yes	Partial	High sea fishing	No	Yes	Yes	Yes	N/A	N/A	S
LT	LŽPGA	Yes	Yes	All	All	No	Yes	Yes	Yes	N/A	N/A	C

Representativeness of the European social partner organisations: Sea fisheries sector

Country	Organisation	LEs	SMEs	Territorial coverage	Types of enterprise covered	Coverage outside sea fisheries	Vessels <12m (SSCF)	Vessels 12–24m (LSF)	Vessels >24m (DWF)	Cooperatives	Self-employed	Domain
LT	TŽPŽA	Yes	Yes	All	High sea fishing	Fish processing and trade	Yes	Yes	Yes	N/A	N/A	SO
LT	ŽŽPA	Yes	Yes	All	All	No	Yes	Yes	Yes	No	No	C
LV	KZA	Yes	Yes	Partial	All	Fish processing	N/A	N/A	N/A	N/A	N/A	SO
LV	LZA	Yes	Yes	All	All	Fish processing	N/A	N/A	N/A	N/A	N/A	O
LV	LZF	Yes	Yes	All	All	Fish processing, freshwater fishing, tourism	Yes	Yes	Yes	Yes	Yes	O
MT	Koperattivi Malta	Yes	Yes	All	All	Cooperatives	Yes	Yes	Yes	Yes	No	O
NL	Nederlandse Visserbond	Yes	Yes	All	All	No	Yes	Yes	Yes	N/A	Yes	C
NL	RVZ	Yes	Yes	All	Freezer trawlers	No	Yes	Yes	Yes	N/A	N/A	S
NL	VisNed	Yes	Yes	All	Cutter fisheries	No	Yes	Yes	Yes	Yes	Yes	S
PL	PAOP	Yes	No	N/A	N/A	No	N/A	N/A	N/A	No	No	S
PT	ADAPI	Yes	Yes	All	Not artisanal	No	Yes	Yes	Yes	No	Yes	S
PT	FPA	No	Yes	Partial	Partial	N/A	N/A	N/A	N/A	Yes	Yes	S
RO	AROP	Yes	Yes	All	All	Freshwater fishing	Yes	Yes	Yes	N/A	N/A	O
RO	FOPMN	Yes	Yes	All	All	Aquaculture, shellfishing	Yes	Yes	Yes	N/A	N/A	O
SE	Gävlefisk	Yes	Yes	Partial	Self-employed	No	Yes	Yes	Yes	N/A	N/A	S
SE	HKPO	Yes	Yes	All	Self-employed	No	Yes	Yes	Yes	N/A	N/A	S
SE	NKFO	Yes	Yes	Partial	Self-employed	No	Yes	Yes	Yes	N/A	N/A	S
SE	SFPO	Yes	Yes	All	Self-employed	No	Yes	Yes	Yes	N/A	N/A	S
SE	SPF	Yes	Yes	Partial	Self-employed	No	Yes	Yes	Yes	N/A	N/A	S

Representativeness of the European social partner organisations: Sea fisheries sector

Country	Organisation	LEs	SMEs	Territorial coverage	Types of enterprise covered	Coverage outside sea fisheries	Vessels <12m (SSCF)	Vessels 12–24m (LSF)	Vessels >24m (DWF)	Cooperatives	Self-employed	Domain
SI	No sector-related employer organisations											
UK	NFFO	Yes	Yes	All	All	No	Yes	Yes	Yes	N/A	N/A	C
UK	SFF	Yes	Yes	Partial	All	No	Yes	Yes	Yes	N/A	N/A	S

Notes: N/A = not applicable. C = congruence; O = overlap; S = sectionalism; SO = sectional overlap. LEs = large enterprises; SMEs = small and medium-sized enterprises. Green shading indicates congruence.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Employer organisations and business associations are present in almost all countries covered by this study, with the exceptions of Croatia and Slovenia. Table 14 shows that employer organisations tend to represent specific interests within the sea fishing sector, often relating to type of fishing activity (coastal or open sea fishing) or size (and type) of vessel. Sectionalism is the most widespread pattern of representation, involving 28 of the 57 sector-related organisations (49%). Sectional overlap occurs in 12 organisations (21%), while overlap occurs in 9 organisations and congruence in 8 (16% and 14%, respectively) (Figure 8).

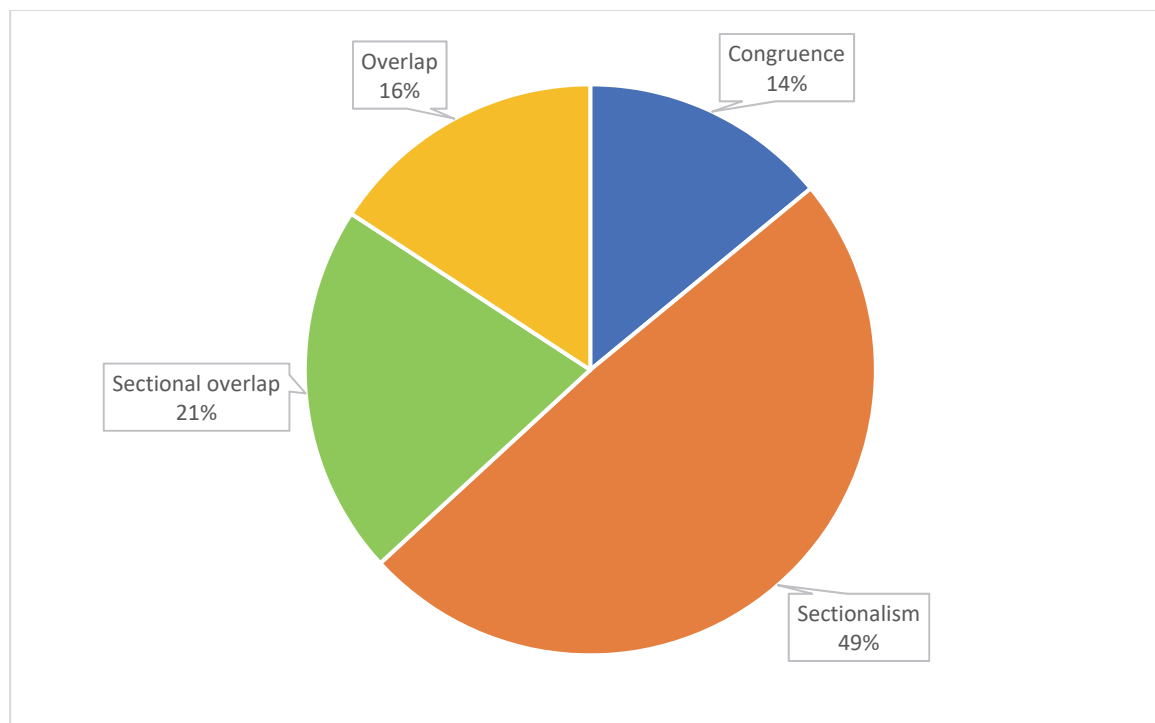
Table 14: Membership domain patterns of the 57 sector-related employer organisations and business associations in the sea fisheries sector, 2019

Country	Congruence	Sectionalism	Sectional overlap	Overlap
BE	Rederscentrale			
BG		BSSFA (CЧИ)		BG Fish (АПРПБФ)
CY		FEA, CMVA, CPFAASVFIE, CFAAF		
DE				DFV
DK		DFPO, DPPO		
EE	EKL	EKPL		EK
EL		DASE, PEPMA, PEPESA		
ES		CEPESCA	FNCP	
FI	SAKL			
FR		UAPF	CFDT-Sympa, FFSPM-PP, SNAPP-CFTC, SNMPA-CGT	
IE	IFPO	ISWFPO, KFO	<i>ICOS</i>	
IT		<i>Federcoopescas-Confcooperative</i>	Federpesca , <i>AGCI Agrital, Legacoop Agroalimentare, UNCI Agroalimentare</i>	ANAPI Pesca
LT	LŽPGA, ŽŽPA	KŽJA	TŽPŽA	
LV			KZA	LZF, LZA
MT				Koperattivi Malta
NL	Nederlandse Vissersbond	RVZ, VisNed		
PL		PAOP		
PT		ADAPI, FPA		
RO				AROP, FOPMN
SE		Gävlefisk, HKPO, NKFPPO, SFPO, SPF		
UK	NFFO	SFF		

Notes: Members of *Europêche* are marked in bold, while members of *COGECA* are in italics; members of both *Europêche* and *COGECA* are in both bold and italics.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Figure 8: Domain coverage of the 57 employer organisations and business associations in the sea fisheries sector, 2019 (%)



Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Assessment of associational density among employer organisations is particularly challenging since no comparable cross-country data is available on the number of enterprises in the sea fishing sector. The closest proxy available is the number of vessels, which may be relatively reliable given the prevalence of solo entrepreneurs with single vessels, as well as the common correspondence between larger ships and individual companies. Moreover, while enterprise membership data were usually available, the number of employees covered by the various associations was seldom reported. However, we were able to collect the associational density of various organisations in terms of employees in a number of cases. With these qualifications, Table 15 includes membership data for almost all sector-related organisations. Information is missing for 10 associations out of 57 (18%). Data on density in terms of employees covered was reported for 22 of the 57 organisations (39%).

The associational density rates are quite varied. The share of enterprises (vessels) affiliated to national-level interest representations ranges from less than 1% up to 100%. The share of fishers working for employers that are affiliated to employer organisations can be estimated for 11 countries. They vary between 6% (Portugal, all employer organisations covered) and 100%. As the bigger enterprises are more likely to be affiliated to an employer organisation, membership figures tend to look more favourable when looking at the workers covered than when looking at the sheer number of enterprises. Overall, based on the data collected, associational density is 37% in terms of companies and 56% in terms of employees.

Table 15: Organisational density of employer organisations and business associations in the sea fisheries sector, 2019

	Vessels (number)	Member enterprises (number)	Employer organisations for which information on enterprises is provided	Density (enterprises) (%)	Employer organisations for which information on workforce is provided	Density (employees) (%)
BE	73	72	1 out of 1	98.6	0 out of 1	N/A
BG	1,897	51	2 out of 2	2.7	2 out of 2	100.0
CY	799	809	4 out of 4	About 100	4 out of 4	87.0
DE	1,397	500	1 out of 1	35.8	0 out of 1	N/A
DK	1,726	686	2 out of 2	39.7	2 out of 2	71.0
EE	1,589	14	3 out of 3	0.9	3 out of 3	100.0
EL	14,985	13,850	3 out of 3	About 90	1 out of 3	About 100
ES	9,356	8,810	2 out of 2	94.2	2 out of 2	About 100
FI	3,217	180	1 out of 1	5.6	0 out of 1	N/A
FR	6,970	97	2 out of 5	1.4	2 out of 5	17.0
HR	8,349	No employer organisations	N/A	N/A	N/R	–
IE	1,954	N/A	0 out of 4	–	0 out of 4	N/A
IT	12,270	3,841	6 out of 6	31.3	3 out of 6	72.0
LT	149	46	4 out of 4	30.9	0 out of 4	N/A
LV	324	52	3 out of 3	16.0	0 out of 3	N/A
MT	935	–*	1 out of 1	50–70	1 out of 1	70.0
NL	736	300	1 out of 3	40.8	0 out of 3	N/A
PL	844	2	1 out of 1	0.2	0 out of 1	N/A
PT	7,950	492	2 out of 2	6.2	1 out of 2	6.0
RO	155	37	2 out of 2	23.9	1 out of 2	86.2
SI	172	No employer organisations	N/A	N/A	N/A	–
SE	1,209	370	4 out of 5	30.6	0 out of 5	N/A
UK	6,267	408	2 out of 2	6.5	0 out of 2	N/A

Notes: N/A = not applicable; N/R = not relevant; – = not possible to calculate. * Data available only as a percentage of total.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Involvement of employer organisations in collective bargaining

Table 16 shows whether employer organisations are involved in collective bargaining and the prevalence of policy consultation. While 26% of employer organisations are involved in collective bargaining (15 organisations; Figure 9), 79% are consulted over sector-related policies (45 organisations; Figure 10).

Table 16: Involvement of the 57 employer organisations and business associations in the sea fisheries sector in collective bargaining and social dialogue

Country	Organisation	EU affiliation	Collective bargaining	Consultation
BE	Rederscentrale	EAPO	Yes	Regularly
BG	BG Fish (АПРПБФ)	None	No	Ad hoc
BG	BSSFA (СЧИ)	None	No	Never
CY	FEA	None	No	Never
CY	CMVA	None	No	Never
CY	CPFAASVFIE	None	No	Never
CY	CFAAF	None	No	Never
DE	DFV	Europêche, COGECA, EAPO, EUFA	No	Ad hoc
DK	DFPO	EAPO	Yes	Regularly
DK	DPPO	EAPO, Association of Sustainable Fisheries (ASF)	Yes	Regularly
EE	EK	None	No	Regularly
EE	EKPL	None	No	Regularly
EE	EKL	None	No	Regularly
EL	DASE	None	No	Never
EL	PEPMA	MEDAC	No	Ad hoc
EL	PEPESA	None	No	Regularly
ES	CEPESCA	Europêche	Yes	Regularly
ES	FNCP	Europêche	No	Regularly
FI	SAKL	None	No	Regularly
FR	UAPF	Europêche	Yes	Regularly
FR	CFDT-Sympa	None	Yes	Regularly
FR	SNAPP-CFTC	None	No	N/A
FR	FFSPM-PP	None	No	N/A
FR	SNMPA-CGT	None	No	Regularly
IE	<i>ICOS</i>	COGECA	No	N/A
IE	IFPO	None	No	Ad hoc
IE	ISWFPO	None	No	Ad hoc
IE	KFO	None	No	Ad hoc
IT	Federpesca	Europêche	Yes	Ad hoc
IT	<i>Federcoopesca-Confcooperative</i>	COGECA	Yes	Ad hoc
IT	<i>Legacoop Agroalimentare</i>	COGECA	Yes	Ad hoc
IT	<i>AGCI Agrital</i>	COGECA	Yes	Ad hoc
IT	UNCI Agroalimentare	None	Yes	Ad hoc
IT	ANAPI Pesca	None	Yes	Ad hoc

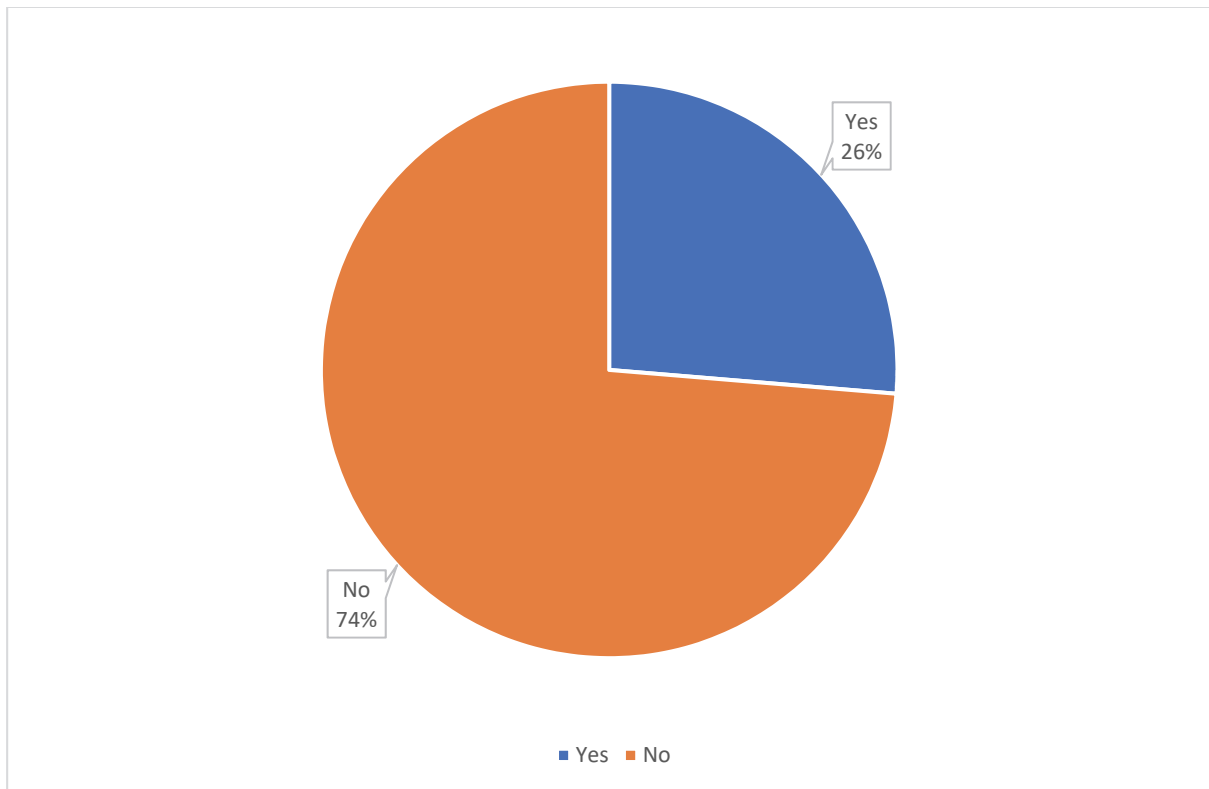
Country	Organisation	EU affiliation	Collective bargaining	Consultation
LT	LŽPGA	None	No	Ad hoc
LT	KŽJA	None	No	Ad hoc
LT	ŽŽPA	None	No	Ad hoc
LT	TŽPŽA	None	No	Ad hoc
LV	LZF	None	No	Regularly
LV	LZA	None	No	Regularly
LV	KZA	None	No	Regularly
MT	<i>Koperattivi Malta</i>	Europêche, COGECA	No	N/A
NL	RVZ	Europêche, EAPO	Yes	Regularly
NL	VisNed	Europêche	No	Regularly
NL	Nederlandse Vissersbond	Europêche, EAPO	No	Regularly
PL	PAOP	Europêche, EAPO, EUFA	No	Ad hoc
PT	ADAPI	None	Yes	N/A
PT	FPA	None	Yes	N/A
RO	FOPMN	None	No	Ad hoc
RO	AROP	None	No	Ad hoc
SE	SFPO	None	No	Regularly
SE	SPF	None	No	Regularly
SE	HKPO	None	No	Regularly
SE	NKFPO	None	No	Regularly
SE	Gävlefisk	None	No	Regularly
UK	NFFO	Europêche	No	Regularly
UK	SFF	Europêche	No	Regularly

Notes: N/A = not applicable. EAPO = European Association of Fish Producers Organisations; EUFA = European Fisheries Alliance; MEDAC = Mediterranean Advisory Council. Members of Europêche are marked in bold, while members of COGECA are in italics; members of both Europêche and COGECA are in both bold and italics.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Following the bottom-up approach (see 'Data collection and quality control measures'), if we consider only involvement in collective bargaining and exclude policy consultation, 15 employer organisations are identified. The top-down approach identifies 16 sector-related national organisations, since they are affiliated to Europêche and/or COGECA. Of the latter, seven are also involved in sector-related bargaining, so that the remaining nine shall be considered as employer organisations because of their EU-level affiliation, according to the top-down approach. Therefore, these two approaches identify 24 national employer organisations participating in sector-related collective bargaining and/or members of the sectoral EU-level organisations. The remaining 33 national organisations appear to operate as business associations.

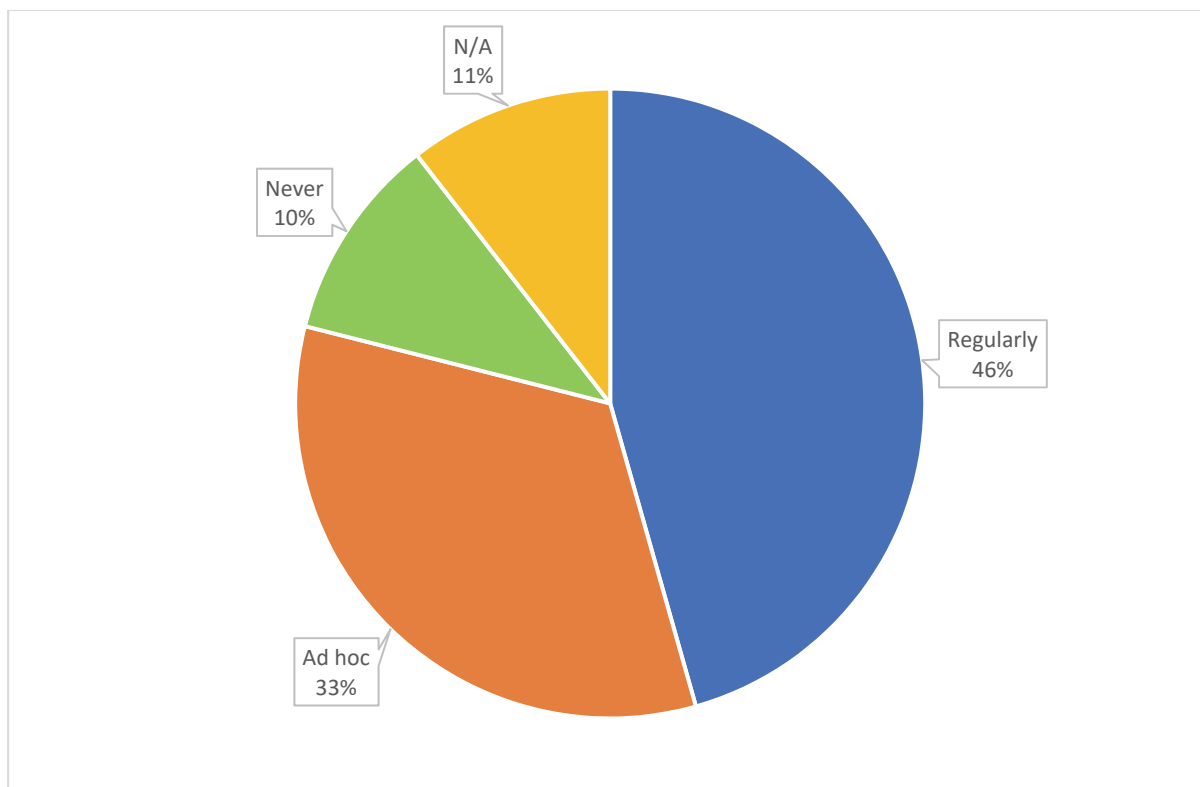
Figure 9: Involvement of employer organisations and business associations in the sea fisheries sector in collective bargaining, 2019 (%)



Note: $n = 57$.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Figure 10: Involvement of employer organisations and business associations in the sea fisheries sector in policy consultation, 2019 (%)



Note: $n = 57$.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Bipartite and tripartite social dialogue bodies

Bipartite and tripartite bodies are present in 10 countries (Table 17). Bipartite bodies involving employers and trade unions are active in some of the countries where collective bargaining takes place. In Belgium, besides the joint committee in charge of sector-related collective bargaining, there are two joint bodies: one covering health and safety and one covering welfare benefits. In Germany, one bipartite body is responsible for setting the reference wage for mandatory insurance coverage against accidents at work. In Denmark, there are two bipartite bodies: one covering work environment and one covering vocational training. In France, there are two bipartite bodies: one covering vocational training and one covering welfare benefits. In Italy there is one bipartite body, which monitors sector developments concerning employment and working conditions, health and safety, and training. In the Netherlands, the one bipartite body is the partner for government consultation on sector-related policies.

For sector-related policies, tripartite bodies involving the government, employer organisations and trade unions are present in four countries: France (at regional level), Greece, Italy and Spain. Also in France, the national Comité Central des pêches maritimes brings together government and employers. In Cyprus, a bipartite government–employer body covers sector regulations (such as permits and quotas) Other tripartite bodies are responsible for training (Denmark, France and Spain) and employment and working conditions (Poland). France has the highest number of bipartite and

tripartite bodies (9 out of 26). Yet other tripartite bodies cover vocational training, working conditions, health and safety, and pensions. In the UK, a bipartite body involving government and employer organisations is responsible for health and safety.

Table 17: Bipartite and tripartite bodies with relevance for the sea fisheries sector, 2019

	Body	Type	Responsibilities	Origin	Trade unions	Employer organisations
BE	Bipartite committee 143	Bipartite	Collective bargaining	Mandatory	ACV Transcom, BTB-UBOT, ACLVB-CGSLB	Rederscentrale
BE	Previs Zeevissersfonds	Bipartite	Health and safety on ships	Mandatory	ACV Transcom, BTB-UBOT, ACLVB-CGSLB	Rederscentrale
BE	Waarborg en Sociaal Fonds voor de Zeevarenden in het Zeevissersfonds (finances a wide range of benefits for people within the sector)	Bipartite	Social funds	Mandatory	ACV Transcom, BTB-UBOT, ACLVB-CGSLB	Rederscentrale
CY	Fisheries Advisory Committee	Bipartite – government and employer organisations	Regulation of the marine fisheries sector (such as fishing permits and quotas)	Mandatory	None	FEA, CMVA, CPFAASVFIE, CFAAF
DE	Seafarers' wage-setting committee for statutory employers accident insurance in the transport sector	Bipartite	Occupational accident insurance	Mandatory	ver.di	DFV
DK	Fiskeriets Arbejdsmiljøråd	Bipartite	The work environment council for fishing	Mandatory	3F	DFPO
DK	Transport-erhvervets Uddannelser, Brancheråd for erhvervsfiskere	Bipartite	The vocational training committee for professional fishers	Mandatory	3F	DFPO
DK	Uddannelsesrådet for de Maritime Uddannelser	Tripartite	The training and education council for maritime education (including training to become a fishing vessel skipper)	Mandatory	3F , Danish Engineers' Association, MMF, Lederne Søfart, CO-Søfart	DFPO, DI, Danish Shipowners, Danish Maritime Authority

	Body	Type	Responsibilities	Origin	Trade unions	Employer organisations
ES	Monitoring Committee for the Operational Programme for Fisheries and Sea 2014–2020	Tripartite	Monitoring the implementation and progress of the operational programme	Ministerial decision (2016)	PASEGES	PEPMA, FGM
ES	Consejo Consultivo de Pesca (Council of Fishing Policy)	Tripartite	Regulation of the sector	Mandatory	CCOO, UGT and CIG	CEOE and CEPYME
ES	Joint Commission of Marine Fishing and Aquaculture of the National Foundation for Continuous Training (FUNDAE)	Tripartite	Continuous training	Mandatory	CCOO, UGT and CIG	CEOE and CEPYME
ES	Consejo General del Instituto Social de la Marina (General Council of the Marine Social Institute)	Tripartite	Managing the social protection system for sea workers	Mandatory	CCOO and UGT	CEOE and CEPYME
FR	OCAPIAT	Bipartite	Vocational training (financing)	Agreement	FNSM-CGT, UM-CFDT, SNMP-CFTC, FEETS-FO	SYMPA-CFTC, UAPF
FR	Service social maritime	Bipartite	Social service/assistance	Agreement	FNSM-CGT, UM-CFDT, SNMP-CFTC, FEETS-FO	SYMPA-CFTC, UAPF
FR	Comité central des pêches maritimes (national level)	Bipartite – government and employer organisations (trade unions have no seats)	Fishery policy	Statutory		SYMPA-CFTC, UAPF
FR	Comité des pêches maritimes (departmental, interdepartmental and regional)	Tripartite	Fishery policy	Statutory	FNSM-CGT, UM-CFDT, SNMP-CFTC, FEETS-FO	SYMPA-CFTC, UAPF
FR	Comité spécialisé de la formation professionnelle maritime	Tripartite	Vocational training, compulsory training	Agreement	FNSM-CGT, UM-CFDT, SNMP-CFTC, FEETS-FO	SYMPA-CFTC, UAPF

	Body	Type	Responsibilities	Origin	Trade unions	Employer organisations
FR	Commission nationale de la négociation collective maritime (National Maritime Collective Bargaining Commission)	Tripartite	Working conditions – agreed the collective agreement signed in the fishing sector (peche, marine marchande)	Agreement	Fédération des officiers de la marine marchande UGICT-CGT, FNSM-CGT, UM-CFDT , Syndicat national des cadres navigants de la marine marchande CGC, SNMP-CFTC, FEETS-FO	SYMPA-CFTC, UAPF
FR	Conseil supérieur des gens de mer	Tripartite	Health and safety	Statutory	Fédération des officiers de la marine marchande UGICT-CGT, FNSM-CGT, UM-CFDT , Syndicat national des cadres navigants de la marine marchande CGC, SNMP-CFTC, FEETS-FO	Armateurs de France, APERMA, GASPE, SYMPA-CFTC, UAPF
FR	Etablissement national des invalides de la marine (Enim)	Tripartite	Pensions	Statutory	FNSM-CGT, UM-CFDT, SNMP-CFTC, FEETS-FO	SYMPA-CFTC, UAPF
FR	Institut maritime de prévention	Tripartite	Working condition and security	Agreement	FNSM-CGT, UM-CFDT, SNMP-CFTC, FEETS-FO	SYMPA-CFTC, UAPF
IT	Osservatorio Nazionale della Pesca (National Fishing Observatory)	Bipartite	Employment and working conditions, health and safety, training	Collective agreement	FAI-CISL, FLAI-CGIL , UILA-Pesca-UIL	Federpesca
IT	Tavolo di Consultazione Permanente della Pesca e dell'Acquacoltura (Permanent Consultation Council on Fishing and Aquaculture)	Tripartite	General issues concerning fishing	Statutory (Ministry of Agricultural, Food, Forestry and Tourism Policies)	FAI-CISL, FLAI-CGIL , UILA-Pesca-UIL, UGL Agroalimentare, Confisal-Pesca	Federpesca , <i>Federcoopesca-Confcooperative, Legacoop Agroalimentare, AGCI Agrital, UNCI Agroalimentare</i>

	Body	Type	Responsibilities	Origin	Trade unions	Employer organisations
NL	Stichting Sectorraad Visserij	Bipartite	Partner of the government for consultations on sector-related policies	Agreement	CNV Vakmensen	RVZ, VisNed, Nederlandse Vissersbond
PL	Tripartite Team for Seafaring and Sea Fishery	Tripartite	Employment and working conditions	Agreement	KSM MiR NSZZ ‘Solidarność’, FZZ MiR (OPZZ), OZZ OiM (FZZ)	ZAP
UK	Fishing Industry Safety Group	Bipartite – employer organisations and government representatives (via the Maritime and Coastguard Agency)	Health and safety in fishing	Voluntary	None	NFFO, SFF, Shipbuilders and Ship Repairers Association

Notes: Some social dialogue bodies, like *Previs Zeevissersfonds* in Belgium and the *Fisheries Advisory Committee* in Cyprus, only cover the sea fisheries sector (congruent), while others also cover other sectors (overlapping), including, for example, seafaring and maritime transport activities. Members of *Europêche* are marked in bold, while members of *COGECA* are in italics; members of both *Europêche* and *COGECA* are in bold and italics.

Source: Network of Eurofound Correspondents’ national contributions to this study, 2019

3. European level of interest representation

This chapter assesses the representativeness of social partners at the European level in three ways. First, the membership strength of the ETF, Europêche and COGECA is analysed based on the presence of national affiliates in each of the countries covered by this study. Second, the capacity to negotiate on behalf of their national affiliates is checked by looking at their statutes and existing arrangements with national affiliates. Third, the representativeness of the organisations currently involved in sectoral social dialogue is assessed against the representativeness of alternative EU-level organisations that operate in the sea fishing sector, if any.

Membership domain of the ETF

The ETF is affiliated to the European Trade Union Confederation (ETUC) and represents workers in the sea fisheries sector as well as in many other industries, such as other segments of the fishing sector, civil aviation, ports and docks, maritime transports, inland waterways, logistics, railways, road transport, urban public transport and tourist transport.¹¹ As a multi-industry federation, the representational domain of the ETF overlaps the sea fisheries sector under review here. National trade unions organising workers in the above-mentioned industries 'are eligible for membership of the ETF provided they are affiliated to the ITF or they are members of a national trade union centre affiliated to the ETUC' (ETF Constitution, RULE II, Membership and obligations).

As shown in Table 18, of the 31 national trade unions active in the sea fisheries sector, 20 are members of the ETF (65%). If we consider membership data, as far as this is available, the ETF's affiliates represent some 25,500 workers out of almost 41,500 unionised fishers, or 61% of total sectoral union members. As for the 11 national trade unions that are not affiliated to the ETF, none are members of another EU-level organisation. It is fair to say, therefore, that the ETF is the sole EU-level organisation on the workers' side with affiliates representing workers in the sea fisheries sector. In particular, the ETF has members in all 11 countries with trade unions in the sea fisheries sector. In all but one of the countries with sector-related trade unions (Portugal), the trade union with most members in the sea fisheries is affiliated to the ETF. Of the 20 ETF members, 15 engage in collective bargaining and 18 in some sort of social consultation (data were not available for the other 2), mostly on a regular basis.

Table 18: Sector-related trade unions' affiliation to the ETF

Country	Trade unions affiliated to the ETF	Trade unions not affiliated to the ETF	Is the trade union with most members in the sector affiliated?
BE	BTB-UBOT, ACV Transcom, ACLVB-CGSLB		Yes
BG	No unions		
DE	ver.di		Yes

¹¹ Conversely, other European trade union federations may cover some activities in sea fishing, as in the case of the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), which may organise fish processing on board very large vessels.

Country	Trade unions affiliated to the ETF	Trade unions not affiliated to the ETF	Is the trade union with most members in the sector affiliated?
DK	3F		Yes
EE	No unions		
EL	No unions		
ES	FSC-CC.OO	FGAMT-CIG, FeSMC-UGT	Yes
FI	No unions		
FR	SNMP-CFTC, FNSM-CGT, FEETS-FO, FGTE-CFD/UM-CFD	FFSPM-M	Yes
HR	No unions		
IE	SIPTU		N/A
IT	FAI-CISL, FLAI-CGIL, UILA-Pesca-UIL	Confisal-Pesca, UGL Agroalimentare	Yes
LT	No unions		
LV	No unions		
MT	No unions		
NL	CNV Vakmensen		Yes
PL	KSM MiR NSZZ 'Solidarność', FZZ MiR	NSZZ Szkuner	Yes
PT	Oficiaismar	FSSP, UGT-Pescas, SLPMPAA, Sindepescas, SITEMAQ	No
RO	No unions		
SE	No unions		
UK	Nautilus International (UK branch), RMT		Yes

Note: N/A = not applicable.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Membership domain of Européche

Europêche is the EU-level organisation representing enterprises with small and large vessels. As shown in Table 19, it has 12 affiliated organisations in 8 countries (Denmark, France, Italy, Malta, the Netherlands, Poland, Spain and the UK). In all eight countries, Européche's members are the largest employer organisations in the sea fisheries sector. In terms of the reported overall membership, Européche's affiliate organisations have a total of 11,870 members, and they represent the enterprises of the countries with the biggest share in sea fishing in Europe (64% of employment).

Table 19: Sector-related employer organisations' affiliation to Européche

Country	Employer organisations affiliated to Européche	Employer organisations not affiliated to Européche	Is the employer organisation with most members in the sector affiliated?
BE		Rederscentrale	No
BG		BSSFA, BG Fish	No
CY		FEA, CMVA, CPFAASVFIE, CFAAF	No
DE	DFV		Yes
DK		DFPO, DPPO	No

Country	Employer organisations affiliated to Europêche	Employer organisations not affiliated to Europêche	Is the employer organisation with most members in the sector affiliated?
EE		EKL, EKPL	No
EL		DASE, PEPMA, PEPESA	No
ES	CEPESCA, FNCP		Yes
FI		SAKL	No
FR	UAPF	SNAPP-CFTC, FFSPM-PP, CFDT-Sympa, SNMPA-CGT	Yes
HR	No employer organisations		
IE		IFPO, ISWFPO, KFO, ICOS	No
IT	Federpesca	Federcoopesca-Confcooperative, Legacoop Agroalimentare, AGCI Agrital, UNCI Agroalimentare, ANAPI Pesca	Yes
LT		KŽJA, LŽPGA, TŽPŽA, ŽŽPA	No
LV		KZA, LZA, LZP	No
MT	Koperattivi Malta		Yes
NL	RZV, VisNed, Nederlandse Vissersbond		Yes
PL	PAOP		Yes
PT		ADAPI, FPA	No
RO		FOPMN, AROP	No
SE		SFPO, SPF, HKPO, NKFPO, Gävlefisk	No
UK	NFFO, SFF		Yes

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Membership domain of COGECA

COGECA's fisheries section represents fishers' cooperatives with small and large vessels. The fisheries section has six affiliates in four countries (Table 20), representing a total of 3,450 national enterprises. In two countries, COGECA's members are the largest employer organisations in the sea fisheries sector. In these cases, COGECA's affiliates are also affiliated to Europêche (DFV in Germany and Koperattivi Malta). ICOS seems to be the only Irish employer organisation, through its affiliation to COGECA, although it was reported as being less active in the sea fisheries sector than the other Irish national sector-related business associations.

Table 20: Sector-related employer organisations' affiliation to COGECA

Country	Employer organisations affiliated to COGECA	Employer organisations not affiliated to COGECA	Is the employer organisation with most members in the sector affiliated?
BE		Rederscentrale	No
BG		BSSFA, BG Fish	No
CY		FEA, CMVA, CPFAASVFIE, CFAAF	No

Country	Employer organisations affiliated to COGECA	Employer organisations not affiliated to COGECA	Is the employer organisation with most members in the sector affiliated?
DE	DFV		Yes
DK		DFPO, DPPO	No
EE		EKL, EKPL	No
EL		DASE, PEPMA, PEPESA	No
ES		CEPESCA	No
FI		SAKL	No
FR		SNAPP-CFTC, FFSPM-PP, CFDT-Sympa, SNMPA-CGT, UAPF	No
HR	No employer organisations		
IE	ICOS	IFPO, ISWFPO, KFO	No
IT	Federcoopesca-Confcooperative, Legacoop Agroalimentare, AGCI Agrital	Federpesca, UNCI Agroalimentare, ANAPI Pesca	No
LT		KŽJA, LŽPGA, TŽPŽA, ŽŽPA	No
LV		KZA, LZA, LZP	No
MT	Koperattivi Malta		Yes
NL		Nederlandse Vissersbond, Visfederatie	No
PL		PAOP	No
PT		ADAPI, FPA	No
RO		FOPMN, AROP	No
SE		SFPO, SPF, HKPO, NKFO, Gävlefisk	No
UK		NFFO, SFF	No

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Representativeness of the ETF, Europêche and COGECA

Tables 21 and 22 show the presence of the ETF, Europêche and COGECA in the countries with the highest sectoral employment in absolute or relative terms. Of the seven countries with the highest share of workers in the EU sectoral workforce, the ETF is present in all countries except Croatia and Greece, where no sectoral trade unions exist and no sector-related collective bargaining takes place. For the countries with the highest sectoral share of national employment, the picture is different. These are mainly smaller countries with no trade unions or collective bargaining. The ETF has affiliates in two countries, Portugal and Spain, and sector-related collective bargaining involvement in Spain.

Europêche has members in five of the seven countries with the highest shares of the EU sectoral workforce, and it covers three of the four countries with collective bargaining, the exception being Portugal. It has members in two of the seven countries with the highest sectoral shares in national employment and covers one of the two countries with collective bargaining. COGECA has affiliates in one of the seven countries with a large share of EU sectoral employment (Italy). The affiliates are

involved in collective bargaining. It also has one member in Malta, a Member State with a high share of the national employment. This member is not involved in collective bargaining.

Table 21: Membership of the ETF, Europêche and COGECA in the countries with the highest shares of workers in the EU sectoral workforce

Country	Trade unions affiliated to the ETF	Involved in collective bargaining	Employer organisations affiliated to Europêche	Involved in collective bargaining	Employer organisations affiliated to COGECA	Involved in collective bargaining
EL	No trade unions	No	0 out of 3	No	0 out of 3	No
ES	1 out of 3	Yes	2 out of 2	Yes	0 out of 2	N/R
FR	4 out of 5	Yes	1 out of 5	Yes	0 out of 5	N/R
HR	No trade unions	No	No employer organisations	No	No employer organisations	No
IT	3 out of 5	Yes	1 out of 6	Yes	3 out of 6	Yes
PT	1 out of 6	No	1 out of 3	No	0 out of 3	N/R
UK	2 out of 2	No	2 out of 2	No	0 out of 2	No

Notes: N/R = not relevant. The light grey cells indicate that some of the social partner organisations of that country are represented at EU level, whereas the dark grey cells indicate that all the social partner organisations of that country are represented by the respective EU social partner organisation.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 22: Membership of the ETF, Europêche and COGECA in countries with the highest shares of sectoral workers in the national workforce

Country	Trade unions affiliated to the ETF	Involved in collective bargaining	Employer organisations affiliated to Europêche	Involved in collective bargaining	Employer organisations affiliated to COGECA	Involved in collective bargaining
CY	No trade unions	No	0 out of 4	No	0 out of 4	No
EE	No trade unions	N/R	0 out of 3	No	0 out of 3	No
EL	No trade unions	No	0 out of 3	No	0 out of 3	No
ES	1 out of 3	Yes	1 out of 1	Yes	0 out of 1	N/R
HR	No trade unions	No	No employer organisations	No	No employer organisations	No
MT	No trade unions	No	1 out of 1	No	1 out of 1	No
PT	1 out of 6	No	0 out of 2	N/R	0 out of 2	N/R

Notes: N/R = not relevant. The light grey cells indicate that some of the social partner organisations of that country are represented at EU level, whereas the dark grey cells indicate that all the social partner organisations of that country are represented by the respective EU social partner organisation.

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Table 23 summarises the key findings on sector representativeness. There are 31 sector-related national trade unions in 11 countries, of which 20 (65%) are affiliated to the ETF, covering all of the 11 countries. If we consider collective bargaining, ETF affiliates make up 15 of the 26 trade unions participating in collective bargaining in the sea fisheries sector, and these cover 7 of the 8 EU countries where collective bargaining takes place. Similarly, ETF affiliates make up 18 of the 24 trade unions consulted on sector-related policies (data were missing for 2 countries). These cover 9 of the 10 countries with organisations involved in policy consultation.

There are 57 sector-related national employer organisations and business associations in 21 countries, of which 12 from 8 countries are affiliated to Europêche, while 6 from 4 countries are members of COGECA. Thirty-three of these 57 organisations are trade organisations: they are neither involved in collective bargaining nor affiliated to a recognised European-level social partner organisation). Subsequently they are not considered in this assessment of the representativeness of the employer organisations.

If we consider collective bargaining, Europêche affiliates make up 27% of the 15 employer organisations participating in collective bargaining in the sea fisheries sector, covering 4 of the 8 EU countries where collective bargaining takes place. Similarly, Europêche affiliates make up 11 of the 20 employer organisations consulted on sector-related policies in 7 of the 9 countries where policy consultation takes place between the government and employer organisations (data for 3 countries were missing, and 9 countries with only business organisations were excluded). In sum, there are 24 organisations in 12 countries that are either involved in collective bargaining or gained social partner status through their affiliation to a European social partner organisation. The 12 Europêche affiliates, thus, correspond to 50% of the 24 national sea fisheries employer organisations. Europêche has an affiliate in 8 of the 12 countries (67%) where there is at least 1 sector-related employer organisation.

COGECA affiliates make up 3 of the 15 employer organisations participating in collective bargaining, covering 1 of the 8 EU countries where collective bargaining takes place. Four of the employer organisations consulted on sector-related policies in two countries are COGECA affiliates. In terms of employer organisations, COGECA has six affiliates, corresponding to 25% of national employer organisations in 33% of the countries with employer organisations in the sea fisheries sector.

Together, Europêche and COGECA have members in 9 of the 21 countries with identified employer organisations/business associations in the sector. Their joint membership amounts to 16 national associations (2 sector-related national employer organisations are affiliated to Europêche and COGECA: DFV in Germany and Koperattivi in Malta). The national organisations affiliated to Europêche and COGECA have some 13,000 members (42% of the total).

Table 23: Sector representativeness of the ETF, Europêche and COGECA

	Number of organisations	Number of countries with organisations	Number of organisations involved in collective bargaining	Number of countries with organisations involved in collective bargaining	Number of organisations involved in policy consultation	Number of countries with organisations involved in policy consultation
All sector-related trade unions	31	11	26	8	24	10
Affiliates of the ETF	20	11	15	7	18	9
Percentage affiliated to the ETF	65%	100%	58%	88%	75%	90%
All sector-related business associations	57	21	15	7	45	18
All sector-related employer organisations	24	12	15	7	20	9
Employer organisations affiliated to Europêche	12	8	4	4	11	7
Percentage affiliated to Europêche	50%	67%	27%	57%	55%	78%
Employer organisations affiliated to COGECA	6	4	3	1	4	2
Percentage affiliated to COGECA	25%	33%	20%	14%	20%	22%
Affiliated to either Europêche or COGECA (number and percentage)	16	9	7	4	14	7
	67%	75%	47%	57%	70%	78%

Source: Network of Eurofound Correspondents' national contributions to this study, 2019

Other sector-related organisations

As mentioned above, no EU-level trade unions other than the ETF have members in the sector. It may, however, be the case that some of the national trade unions with an overlapping membership domain are affiliated to other European trade union organisations for their members in other sectors. The trade unions included in this study did not report any other affiliations in response to

the following question: 'To which other European (sector) trade union organisation is the trade union affiliated for its members in the sea fisheries sector?' The answers to this question are reflected in Table 25 in Annex 1 of this report.

EFFAT reported some activities in aquaculture and fish processing in cooperation with the Italian trade union FAI-CISL and a Spanish affiliated trade union. Both trade unions are also affiliated to the ETF and only reported their ETF affiliation with regard to their members in the sea fisheries sector. In most countries, the sea fisheries sector is organised by transport sector trade unions, while in some cases this is done by agriculture trade unions. Nevertheless, EFFAT only deals with aquaculture and fish processing, while for sea fisheries it is only the ETF that represents the European sea fisheries workers.

As for the employers, besides Europêche and COGECA, EAPO (European Association of Fish Producers Organisations) and EUFA (European Fisheries Alliance) also emerged in the bottom-up screening.

EUFA, according to their website, is a coalition of European fishing fleets representing the interests of fishing fleets in the Member States of the EU, excluding the UK, who have traditionally fished in what are to become 'UK waters'. The single issue this organisation focuses on is the impact of Brexit and the transboundary and interdependent nature of fishing activities in the North Sea, the waters west of Scotland, the Irish Sea and the English Channel. Their founding members represent over 18,000 fishers and 3,500 vessels, all directly impacted by Brexit (EUFA, undated). Its website lists members from Belgium, Denmark, France, Germany, Ireland, the Netherlands, Poland, Spain and Sweden. EUFA cannot be considered a European employer organisation, as it is merely a single-issue coalition dealing with Brexit.

According to its website, EAPO represents 38 fish producer organisations from 10 Member States, with approximately 10,000 vessels, 3.5 million tonnes of landings and €3 billion first sale value (EAOP, undated-a). It reports member organisations in Belgium, Denmark, France, Germany, Ireland, the Netherlands, Poland, Spain, Sweden and the UK (EAOP, undated-b).

EAPO has seven affiliates among the employer organisations identified in this study. Four of them, the Dutch RZV and Nederlandse Vissersbond, the German DFV and the Polish PAOP, are also affiliated to Europêche. DFV and PAOP are also members of EUFA. DFV, PAOP, RZV and Nederlandse Vissersbond are involved in policy consultation. Three are exclusive members of EAPO: the Belgian Rederscentrale and the Danish DFPO and DPPO. The latter three are involved in both collective bargaining and social dialogue in the sea fisheries sector. EAPO, therefore, covers 5 of the 21 countries included in this study with enterprise representation. In terms of membership, it represents some 1,500 enterprises or 5% of the reported members in the sea fisheries sector, including the shared membership with Europêche (802 members).

Negotiating capacity of the ETF, Europêche and COGECA

ETF, Europêche and COGECA have a proven negotiation capacity based on the jointly agreed texts (see Table 1), and especially with their framework agreement of 21 May 2012, implemented via Council Directive 2017/159 of 19 December 2016, concerning the implementation of the ILO Work in Fishing Convention, 2007 (Council of the European Union, 2017). The ETF, which organises different transport sectors, has a section specifically for sea fisheries activities. In the ETF statutes, its social dialogue activities are mentioned, unlike in the Europêche or COGECA statutes. Europêche is a

European employer organisation representing a single sector: sea fisheries. For social and security matters, it has a specific working group which follows the ESSDC. COGECA represents its members in agriculture, forestry, fisheries and agri-food sectors, and it has a specific working group for fisheries and aquaculture.

The **ETF statutes** of May 2017 direct the ETF activities towards

developing relations with European employers' organizations in order to establish sustainable social relations on the European level via social dialogue and negotiations, ensuring workers' representation in the relevant sector Social Dialogue Committees in the sectors of its competence.

(Rule 1, paragraph 7)

The governing bodies of the ETF are its Congress, its Executive Committee and its Management Committee. The bodies established for its activities in the various sectors are called 'sections', one of which is a dedicated section for sea fisheries.

The **ETF Sea Fisheries section** meets twice a year, on top of the involvement of its members in the sea fisheries ESSDC and in EU-funded projects. The ETF Sea Fisheries section is made up of trade union delegates from Belgium, Bulgaria, Denmark, France, Germany, Ireland, Italy, the Netherlands, Poland, Portugal and Spain. Since November 2019, the ETF has a dedicated policy officer for sea fisheries in the ETF Secretariat, who coordinates the activities of the ETF Sea Fisheries section.

It is the ETF Sea Fisheries section that is entitled to take decisions regarding joint opinions, activities or agreements. At each ETF Executive Committee meeting, an activity report on the Sea Fisheries section is presented, including feedback from the ESSDC. Normally, it is the president of the ETF Sea Fisheries section who signs the joint opinions with Europêche and COGECA. The 2012 framework agreement was signed by the ETF General Secretary after consultation with the affiliates organising workers in fisheries. During the negotiation of the agreement, the affiliates were kept informed in writing and through their involvement in the Sea Fisheries section.

The ETF disseminates the results of social dialogue in the sea fisheries sector via its website, social media and reporting in the Fisheries Section and in the Executive Committee. Together with Europêche, the ETF has been following the implementation of Council Directive 2017/159 on the ILO Work in Fishing Convention (Council of the European Union, 2017). One element of the current project Pillars of the Sea II aims to increase the number of ratifications of ILO Convention 188 by conducting country visits and speaking with the relevant authorities.

Europêche, as a representative of national organisations in the sea fisheries sector, has created a working group focused on social and safety affairs. The group mainly consist of one or two experts from each national organisation, who closely follow the matters dealt with in the sea fisheries ESSDC and other relevant forums, such as advisory councils or the European Economic and Social Committee, or international bodies such as the Food and Agriculture Organization of the United Nations, the ILO and the International Maritime Organization. The group consists of about 12 representatives. It is to be noted that the President of Europêche actively participates in this working group. At a technical level, the Europêche working group is consulted before a decision is made to go ahead with a new initiative. However, for relevant matters – for instance, those with strong political

implications – the Secretariat of Europêche also consults the General Assembly (which includes all members of Europêche) to ensure a unanimous approach and consensus. This is the case even for urgent consultations and opinions.

It is customary that whenever there is an initiative or action of interest to the organisation, as provided in Article III of the statutes, the Europêche Secretariat explains to the members what decisions are to be taken by the association. Where an expert or group of experts – other than the President, the Secretary General or the Bureau – are needed to start negotiations, an internal consultation is conducted to select the individual or group. These representatives conduct negotiations, serving and safeguarding the interests of Europêche and respecting the mandate, where it has been given. The results have to be approved by the General Assembly. Before the 2012 framework agreement was signed by the president of Europêche, this procedure had been followed, including approval by its General Assembly.

Europêche is assessing the implementation of the 2012 framework agreement (Directive 2017/159) through: constant monitoring within the sea fisheries ESSDC; active engagement of the Secretariat and members of Europêche with governments and the European Commission; and participation in the workshop organised by the European Commission with Member States on the implementation of the directive and social partners (Council of the European Union, 2017). It has conducted two European projects, co-financed by the Directorate-General for Employment, Social Affairs and Inclusion, to ensure that Member States transpose the directive into national legislation adequately and in a timely manner.

Joint opinions are disseminated by Europêche through its internal network of Europêche-affiliated national organisations. Europêche uploads the texts to its website and uses social media to disseminate the work of the sea fisheries social partners to policymakers, stakeholders and citizens. As social partners, Europêche, the ETF and COGECA produce press releases on relevant matters, which are sent to the media, policymakers and stakeholders. The content is uploaded to their websites and social media.

The **COGECA statutes** do not mention social dialogue, but one of its objectives is to ‘promote discussions and exchanges of views with COPA [Committee of Professional Agricultural Organisations] as well as with other representative organisations at EU and international level’ (Article 2, g). This can be read as a statutory mandate for the COGECA activities in the sea fisheries ESSDC.

COGECA has 45 working parties (shared with COPA) and one of these addresses fisheries and aquaculture: the **Working Party on Fish**. At a technical level, the COPA-COGECA Working Party on Fish is always consulted before a decision is made to go ahead with a new initiative, and this can take the form of a written consultation (via email or intranet) or a meeting. However, for topics with high political implications, the COGECA Secretariat consults the Cooperative Coordination Committee (CCC), the COGECA Presidency and the COGECA Praesidium, which make decisions on these matters.

There are no specific written rules regarding decision-making; however, the standard procedure is to have a decision taken by the Working Party on Fish and, when relevant, by the CCC, the COGECA Presidency and the COGECA Praesidium. Depending on the topic and political implications, a jointly agreed social partner text is signed by the Chair of the COPA-COGECA Working Party on Fish, by the Secretary General of COPA-COGECA or by the President of COGECA.

Based on COGECA statutes, in 2012, the Working Party on Fish had a special status in COGECA, and, in addition to full member organisations such as AGCI Agrital in Italy, they had member organisations affiliated by admission from France (Confédération de la Coopération, de la mutualité et du crédit maritime), from the Netherlands (Stichting van de Nederlandse Visserij) and from Spain (Union de cooperativas de mar). Therefore, in 2012, after being consulted, the Working Party on Fish gave a mandate to negotiate this agreement. The COGECA members were regularly informed about the ongoing negotiations via email or during meetings (the Working Party on Fish or ESSDC meetings).

The implementation of the framework agreement is constantly monitored within the ESSDC via meetings with Member State representatives and the European Commission; it was also assessed through participation in the workshop organised by the European Commission with Member States on the implementation of the directive.

Joint opinions and other jointly agreed European social partner texts from the ESSDC are disseminated via the COGECA internal networks to their member organisations, as well as via the COGECA intranet (agri-info) and, when relevant, the COGECA website.

Effective participation in European social dialogue meetings

Looking at participation in the ESSDC for the sea fisheries sector for the period from 2017 to 2018 (Table 24), on the trade union side, participants from 10 countries took part. On the employer side, participants came from eight countries.

Table 24: Effective participation in the ESSDC for the sea fisheries sector, 2017–2018

Countries with trade union participation in the ESSDC for the sea fisheries sector	BE, BG, DK, ES, FR, IE, IT, MT, NL, UK
Countries with employer participation in the ESSDC for the sea fisheries sector	BE, ES, FR, HR, IT, LT, LV, NL

Source: Eurofound and European Commission

The ETF has affiliated sea fisheries trade unions in Belgium, Denmark, France, Germany, Italy, the Netherlands, Poland, Portugal, Spain and the UK. None of the delegates from member organisations from Germany, Poland and Portugal attended meetings of the sea fisheries ESSDC in 2017 or 2018. While trade union participants were recorded from Bulgaria, Ireland and Malta in 2017, this study has indicated that the ETF does not have a member organisation in those countries yet.

Europêche has affiliated employer organisations in the sea fisheries sector in France, Germany, Italy, Malta, the Netherlands, Poland, Spain and the UK, and COGECA has member organisations in Germany, Ireland, Italy and Malta. Even though Europêche has a member organisation in Germany, Malta, Poland and the UK, none of their delegates attended any of the 2017 or 2018 meetings of the sea fisheries ESSDC. COGECA has member organisations in Germany, Ireland and Malta that did not attend any of the 2017 or 2018 meetings. While delegates from employer organisations from Belgium, Latvia and Lithuania attended meetings of the ESSDC, neither Europêche nor COGECA has affiliated organisations in those countries currently.

Member organisations that are not directly represented in meetings of the ESSDC are normally kept informed about developments in the committee via their participation in meetings of the statutory bodies of their European organisation or via the ESSDC intranet or website.

Conclusions

The sea fisheries sector employs some 150,000 workers in 22 Member States and the UK. Half of the EU sea fisheries workforce is employed in the three Member States with the largest sectoral workforce: Greece, Italy and Spain. Large sea fisheries workforces also exist in Croatia, France, Portugal and the UK. In each of the other countries, the sectoral workforce is at most 3,000 employees. In the landlocked countries (Austria, Czechia, Hungary, Luxembourg and Slovakia), there is no sea fishery activity.

In the sea fisheries sector, there is a high prevalence of small, and often family-run, businesses and a large share of self-employed fishers. A distinction can be made between three types of sea fishing: small-scale sea fishing, large-scale sea fishing and distant-water sea fishing (see Box 1 for definitions). Estonia, Finland and Greece are examples of countries where most sea fisheries activities are of the small-scale type. In small-scale sea fisheries, unpaid labour by household collaborators and non-professional fishers is widespread, and this is in line with national regulations. In small-scale sea fisheries, the average staff per vessel is 1.6 persons, and vessels are under 12 metres and use static gears. In large-scale sea fishing, the average staff is 4.3 persons per vessel, and vessels are between 12 and 24 metres and use static gears or towed gears. Belgium, Denmark and the Netherlands are examples of countries where most sea fishery activities are of the large-scale type. Lithuania and Spain also have a significant proportion of sea fishery activities in distant waters, for which vessels are larger than 24 metres with an average staff of 27 persons.

This study identified 31 sea fisheries sector trade unions in 11 countries. A total of 57 sectoral employer organisations and business associations were found in 21 different countries, of which 24 can be considered as employer organisations (in 12 countries). There are, thus, 12 countries with sea fisheries activities where no sectoral trade unions could be identified, among which are Croatia and Greece, countries with large sea fisheries workforces. No employer organisations were found for Croatia and Slovenia, even though both countries have sea fisheries activities. Most of the sea fisheries sector trade unions have an overlapping membership domain, covering members in maritime transport or other transport, services or food sectors in addition to sea fisheries. This is not the case for the sectoral employer organisations because they mostly cover just a part of the sea fisheries sector.

Collective bargaining was reported in eight countries (representing 62.2% of EU employment in the sea fisheries sector). Sectoral social dialogue institutions exist in 11 countries and consultations over sector-related policies take place in 18 countries. This study identified 26 trade unions involved in collective bargaining in 8 countries, and 15 employer organisations involved in collective bargaining in 7 countries.

The ESSDC for the sea fisheries sector includes the ETF, organising the trade unions, and *Europêche* and COGECA, organising the employer organisations. This European sectoral social dialogue for sea fisheries has existed since 1974. Over the years, it has resulted in more than 50 joint texts, including a 2012 framework agreement via which ILO convention 188 is transposed by Council Directive 2017/159 (Council of the European Union, 2017). Thus, the European sea fisheries social partners have proven their negotiation capacity in practice.

Of the 31 sea fisheries trade unions, 20 are affiliated to the **ETF**; these are present in all the 11 countries where sectoral trade unions were identified (Belgium, Denmark, France, Germany, Ireland, Italy, the Netherlands, Poland, Portugal, Spain and the UK). It is only in Portugal that the trade union with most members in sea fisheries is not affiliated to the ETF. Of the 20 ETF members, 15 engage in collective bargaining, and most of those for which data could be collected are involved in some sort of social consultation, mostly on a regular basis. The exception is Poland, where small-scale sea fishers (on vessels smaller than 12 metres) are not represented by the Polish trade unions affiliated to the ETF. Its members in the nine other countries represent the sea fisheries sector as a whole. The ETF's affiliates represent some 25,500 workers out of almost 41,500 unionised fishers, or 61% of total sectoral union members.

Of the seven countries with the largest sea fisheries workforce, the ETF has no member organisations in Croatia or Greece: no sectoral trade unions were identified for those countries. For Portugal and the UK, the ETF has members that are not involved in collective bargaining (Table 21). Among the countries where sea fisheries employment as proportion of the entire workforce is highest, the ETF has no affiliates in Croatia, Cyprus, Estonia, Greece or Malta: no sectoral trade unions were identified in those countries.

Having checked for other European trade union organisations with some representativeness in the sector, only EFFAT declared some activities in the area of fish processing and aquaculture, in cooperation with Italian and Spanish sectoral trade unions. These trade unions are members of both the ETF and EFFAT, though they did not mention their affiliation to EFFAT in the scope of this study. Of the 11 national trade unions active in sea fisheries that are not affiliated to the ETF, none declared affiliation to another EU-level organisation. This confirms that **the ETF is the only representative European trade union organisation in the sea fisheries sector**.

On the employers' side, domestic associations with no European-level affiliation are the most common. While the larger enterprises are in general affiliated to industry organisations, the latter often operate more as business organisations than social partner organisations. Of the 57 sector-related associations in 21 countries, 37 have no European affiliation. Thirty-three organisations are neither involved in collective bargaining nor affiliated to an EU-level organisation.

Europêche has 12 affiliated employer organisations (50% of the sectoral employer organisations) in 8 countries (France, Germany, Italy, Malta, the Netherlands, Poland, Spain and the UK). In terms of reported overall membership, Europêche's affiliate organisations have a total of 11,870 members. Where Europêche has affiliates, they are the largest national associations in the sector. **COGECA** has six affiliated employer organisations (50%) in four countries (Germany, Ireland, Italy and Malta). COGECA's affiliate organisations have a total of 3,450 members. In two countries, COGECA's members are the largest employer organisations in the sea fisheries sector. In both of these cases (DFV in Germany and Koperattivi Malta), the COGECA affiliates are also affiliated to Europêche.

Together, Europêche and COGECA have 16 member organisations out of the 24 sectoral employer organisations (67%) in 9 of the 12 countries (75%) with employer organisations. Of the 15 employer organisations involved in collective bargaining in 7 countries, they represent 7 of them (47%), in 4 countries (57%). There are employer organisations not yet represented in the ESSDC in Belgium, Denmark and Portugal.

Among the seven countries with the largest sectoral workforce, neither Européche or COGECA have a member organisation in Croatia or Greece (Table 21). For the countries with the highest proportion of persons working in the sector, no organisation is represented in the ESSDC from Croatia, Cyprus, Estonia, Greece or Portugal (Table 22). For Croatia, this is because no sectoral employer organisations exist. Moreover, no employer organisations are active in Cyprus, Estonia and Greece.

Having looked at whether other European associations have some representativeness in the sea fisheries sector, EAPO was identified. According to its website, EAPO has member organisations in 10 Member States. EAPO has member organisations in two Member States where neither Européche nor COGECA have members: Belgium and Denmark.

Overall, based on the findings in this study, **Européche and COGECA can be considered as representative European social partner organisations** for the sea fisheries sector, though EAPO has some additional representativeness but is not yet covered in the ESSDC.

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Annex 1: Trade unions, national employer organisations and business associations in the sea fisheries sector

Table 25: National trade unions in the sea fisheries sector

Country	Organisation	Full name in original language	Full name in English
BE	BTB-UBOT	Belgische Transportarbeidersbond (BTB) Union Belge des Ouvriers (UBOT)	Belgian Transport Worker Union
BE	ACV Transcom	ACV Transcom	ACV Transcom
BE	ACLVB-CGSLB	Algemene Centrale der Liberale Vakverbonden van België (ACLVB)/ Centrale Générale des Syndicats Libéraux de Belgique (CGSLB)	General Federation of Liberal Trade Unions of Belgium
CY	SEGDA MELIN-PEO	Συντεχνία Εργατοϋπαλλήλων Γεωργίας, Δασών, Μεταφορών, Λιμενεργατών, Ναυτεργατών και Συναφών Επαγγελμάτων Κύπρου-ΠΕΟ	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union-PEO
CY	OMEPEGE-SEK	Ομοσπονδία Εργατοϋπαλλήλων Μεταφορών, Πετρελαιοειδών και Γεωργίας Κύπρου-ΣΕΚ	Employees' Federation of Transport, Petroleum and Agriculture-SEK
DE	ver.di	Vereinte Dienstleistungsgewerkschaft	United Services Union
DK	3F	Fagligt Fælles Forbund	United Federation of Danish Workers
ES	FeSMC-UGT	Federación de Servicios para la Movilidad y el Consumo	Mobility and Consumption Services Federation
ES	FSC-CC.OO	Federación de Servicios a la Ciudadanía	Federation of Services to Citizens
ES	FGAMT-CIG	Federación Galega de Alimentación, Mar y Transporte	Galician Federation of Food, Sea and Transports
FR	FEETS-FO	Fédération Force Ouvrière de l'Équipement, de l'Environnement, des Transports et des Services	Federation of Equipment, Environment, Transport and Services
FR	FGTE-CFD/UM-CFD	Fédération générale des transports- environnement	General federation of transport- environment
FR	SNMP-CFTC	Syndicat National des Marins Pêcheur	National Union of Fishermen Mariners
FR	FNSM-CGT	Fédération des syndicats maritimes	Federation of Maritime Trade Unions
FR	FFSPM-M	Fédération française des syndicats professionnels maritimes matelots	French Federation of Maritime Professional Unions Sailors
IE	SIPTU	Services, Industrial, Professional and Technical Union	Services, Industrial, Professional and Technical Union
IT	FAI-CISL	Federazione Agricola Alimentare Ambientale Industriale Italiana	Italian Agricultural Food Environmental Industrial Federation
IT	FLAI-CGIL	Federazione Lavoratori Agroindustria	Federation of Agricultural and Food Processing Workers

Country	Organisation	Full name in original language	Full name in English
IT	UILA-Pesca-UIL	Unione Italiana Lavoratori Pesca e Acquacoltura	National Italian Union of Fishing and Aquaculture Workers
IT	UGL Agroalimentare	Federazione Nazionale UGL Agroalimentare	National Agri-Food Federation
IT	Confisal-Pesca	Federazione Italiana dei Sindacati Autonomi del Settore Pesca	Italian Federation of Autonomous Trade Unions of the Fishing Sector
NL	CNV Vakmensen	Christelijke Nederlandse Vakbond – Vakmensen	Christian Dutch Trade Union – Professionals
PL	KSM MiR NSZZ ‘Solidarność’	Krajowa Sekcja Morska Marynarzy i Rybaków NSZZ ‘Solidarność’	National Maritime Section of Seamen and Fishermen of Independent Self-Governing Trade Union Solidarność
PL	FZZ MiR	Federacja Związków Zawodowych Marynarzy i Rybaków	Seamen and Fishermen Trade Union Federation
PL	NSZZ Szkuner	Niezależny Samorządny Związek Zawodowy Szkuner	Independent Self-governing Trade Union Szkuner
PT	FSSP	Federação dos Sindicatos do Sector da Pesca	Federation of Unions of the Fishery Sector
PT	UGT-Pescas	Sindicato Nacional dos Trabalhadores do Sector das Pescas	National Union of Workers of the Fishery Sector
PT	Sindepescas	Sindicato Democrático das Pescas	Democratic Union of Fishery
PT	SITEMAQ	Sindicato da Marinha Mercante, Indústrias e Energia	Union of Merchant Marine, Manufacturing and Energy
PT	SLPMPAA	Sindicato Livre dos Pescadores, Marítimos e Profissionais Afins dos Açores	Free Union of Fishermen, Maritime and Related Professionals of the Azores
PT	Oficiaismar	Sindicato dos Capitães, Oficiais Pilotos, Comissários e Engenheiros da Marinha Mercante	Union of Captains, Official Pilots, Commissioners and Engineers of the Merchant Marine
UK	Nautilus International	Nautilus International (UK branch)	Nautilus International (UK branch)
UK	RMT	Rail Maritime and Transport Union	Rail Maritime and Transport Union

Table 26: Affiliation, collective bargaining and consultation of national trade unions in the sea fisheries sector

Country	Organisation	EU affiliation	Collective bargaining	Consultation
BE	BTB-UBOT	ETF	MEB and SEB	Regularly
BE	ACV Transcom	ETF	MEB and SEB	Regularly
BE	ACLVB-CGSLB	ETF	MEB and SEB	Regularly
DE	ver.di	ETF	None	Ad hoc
DK	3F	ETF	MEB	Ad hoc
ES	FeSMC-UGT	None	MEB and SEB	Regularly
ES	FSC-CC.OO	ETF	MEB and SEB	Regularly
ES	FGAMT-CIG	None	SEB	Never
FR	FEETS-FO	ETF	MEB and SEB	Regularly

Country	Organisation	EU affiliation	Collective bargaining	Consultation
FR	FGTE-CFDT/UM-CFDT	ETF	MEB and SEB	Regularly
FR	SNMP-CFTC	ETF	MEB and SEB	Regularly
FR	FNSM-CGT	ETF	MEB and SEB	Regularly
FR	FFSPM-M	None	MEB and SEB	N/A
IE	SIPTU	ETF	None	N/A
IT	FAI-CISL	ETF	MEB and SEB	Regularly
IT	FLAI-CGIL	ETF	MEB and SEB	Regularly
IT	UILA-Pesca-UIL	ETF	MEB and SEB	Regularly
IT	UGL Agroalimentare	None	MEB	Regularly
IT	Confisal-Pesca	None	MEB and SEB	Regularly
NL	CNV Vakmensen	ETF	MEB	Regularly
PL	KSM MiR NSZZ 'Solidarność'	ETF	SEB	Ad hoc
PL	FZZ MiR	ETF	SEB	Ad hoc
PL	NSZZ Szkuner	None	SEB	Never
PT	FSSP	None	MEB and SEB	Ad hoc
PT	UGT-Pescas	None	MEB	Ad hoc
PT	Sindepescas	None	SEB	Ad hoc
PT	SITEMAQ	None	MEB	Ad hoc
PT	SLPMPAA	None	MEB	N/A
PT	Oficiaismar	ETF	None	N/A
UK	Nautilus International (UK branch)	ETF	None	Ad hoc
UK	RMT	ETF	None	Ad hoc

Note: Members of ETF are marked in bold. MEB = multi-employer collective bargaining; SEB = single-employer collective bargaining.

Table 27: National business associations and national employer organisations in the sea fisheries sector

Country	Organisation	Full name in original language	Full name in English
BE	Rederscentrale	Rederscentrale	Shipowner Federation
BG	АПРПБФ	АСОЦИАЦИЯ НА ПРОИЗВОДИТЕЛИТЕ НА РИБНИ ПРОДУКТИ БГ ФИШ	Association of the Fish Products Producers (BG Fish)
BG	СЧИ	Сдружение „Черноморски изгрев“	Black Sea Sunrise Fishery Association (BSSFA)
CY	ΣΕΟ	Σύνδεσμος Εργοδοτών Αλιείας	Fisheries Employer Association (FEA)
CY	ΣΠΣΚ	Σύνδεσμος Πολυδύναμων Σκαφών Κύπρου	Cyprus Multipurpose Vessels Association (CMVA)

Country	Organisation	Full name in original language	Full name in English
CY	ΠΣΕΨΠΑΜΣΠΑ	Παγκύπριος Σύνδεσμος Επαγγελματιών Ψαράδων Παράκτιας Αλιείας Μικρών Σκαφών Περιοδικής Απασχόλησης (Κατηγορία Γ')	Cyprus Professional Fishers Association of Alongshore Small Vessels Fishing of Intermittent Employment (Category C) (CPFAASMVFIE)
CY	ΠΣΕΨΠΑ	Παγκύπριος Σύνδεσμος Επαγγελματιών Ψαράδων Παράκτιας Αλιείας (Κατηγορίας Α και Β)	Cyprus Fishers Association of Alongshore Fishing (Categories A and B) (CFAAF)
DE	DFV	Deutscher Fischerei-Verband	German Fishery Association
DK	DFPO	Danmarks Fiskeriforening Producent Organisation	Danish Fishing and Producer Association
DK	DPPO	Danmarks Pelagiske Producentorganisation	Danish Pelagic Producer Organisation
EE	EK	Eesti Kalaliit	Estonian Association of Fishery
EE	EKPL	Eesti Kaugröödajate Liit	Estonian Long-Distance Fishing Association
EE	EKL	Eesti Kalurite Liit	Estonian Fishermen's Association
EL	DASE	Δίκτυο Αλιευτικών Συλλόγων Ελλάδος	Network of Fishing Associations of Greece
EL	PEPMA	Πανελλήνια Ένωση Πλοιοκτητών Μέσης Αλιείας	Panhellenic Union of Middle Range Fisheries
EL	PEPESA	Πανελλήνια Ένωση Πλοιοκτητών Επαγγελματικών Σκαφών Αλιείας «η Μεσόγειος»	'Mesogeios' Pan-Hellenic Union of Professional Fishing Vessel Owners
ES	CEPESCA	Confederación Española de Pesca	Spanish Fishing Confederation
ES	FNCP	Federación Nacional de Cofradías de Pescadores	National Federation of Fishermen's Guilds
FI	SAKL	Suomen Ammattikalastajien Liitto	Finnish Fishermen's Association
FR	UAPF	Union des Armateurs à la Pêche de France	Shipowners' Union of French Fishery
FR	CFDT-Sympa	Syndicat maritime des pêcheurs artisans	Maritime Union of Artisan Fishermen
FR	SNAPP-CFTC	Syndicat national des artisans patrons pêcheurs	National Craftsmen's Union of Employer Fishermen
FR	FFSPM-PP	Fédération française des syndicats professionnels maritimes patrons propriétaires	French Federation of Maritime Professional Unions of Owners
FR	SNMPA-CGT	Syndicat national des marins pêcheurs artisans	National Union of Artisan Fishermen
IE	ICOS	Irish Co-operative Society	Irish Co-operative Society
IE	IFPO	Irish Fish Producers Organisation	Irish Fish Producers Organisation
IE	ISWFPO	Irish South and West Fish Producers Organisation	Irish South and West Fish Producers Organisation

Country	Organisation	Full name in original language	Full name in English
IE	KFO	Killybegs Fishermen's Organisation	Killybegs Fishermen's Organisation
IT	Federpesca	Federazione Nazionale delle Imprese di Pesca	National Federation of Fishing Companies
IT	Federcoopesca-Confcooperative	Federcoopesca-Confcooperative	Federcoopesca-Confcooperative
IT	Legacoop Agroalimentare	Lega nazionale delle cooperative – settore Agroalimentare	Legacoop Agriculture and Food
IT	AGCI Agrital	Associazione Generale delle Cooperative Italiane – Settore Agro Ittico Alimentare	General Association of the Italian Cooperatives – Agro, Food and Fishing Sector
IT	UNCI Agroalimentare	Unione Nazionale Cooperative Italiane – Settore Agroalimentare	National Union of Italian Cooperatives – Agro-food Sector
IT	ANAPI Pesca	Associazione Nazionale Autonoma Piccoli Imprenditori della Pesca	National Autonomous Association Small Fishing Entrepreneurs
LT	LŽPGA	Lietuvos žuvininkystės produktų gamintojų asociacija	Association of producers of fishery products of Lithuania
LT	KŽJA	Klaipėdos žuvininkystės įmonių asociacija 'Jūros žvejys'	Association of Klaipėda's fishing companies 'Sea Fisherman'
LT	ŽŽPA	Žvejų ir žuvis perdirbėjų asociacija 'Baltijos žvejas'	Association of fishermen and fish processors 'Baltic fisherman'
LT	TŽPŽA	Tarptautinė žuvis perdirbėjų ir žvejų asociacija 'Baltijos vienybė'	International association of fish processors and fishermen 'Baltic unity'
LV	LZF	Latvijas Zvejnieku federācija	Latvian Fishermen's Federation
LV	LZA	Latvijas Zivsaimnieku asociācija	Latvian Fisheries Association
LV	KZA	Kurzemes Zvejnieku asociācija	Kurzeme Fishermen Association
MT	Koperattivi Malta	Koperattivi Malta	Cooperatives Malta
NL	RVZ	Redersvereniging voor de Zeevisserij	Shipowners Association Sea Fisheries
NL	VisNed	Vereniging Kottervisserij Nederland	VisNed
NL	Nederlandse Vissersbond	Nederlandse Vissersbond	Dutch Fishers' Union
PL	PAOP	Północnoatlantycka Organizacja Producentów	North Atlantic Producers Organisation
PT	ADAPI	Associação dos Armadores das Pescas Industriais	Association of Industrial Fishery
PT	FPA	Federação das Pescas dos Açores	Federation of Fishery of the Azores
RO	FOPMN	Federatia Organizatiilor de Pescuit de la Marea Neagra	Federation of Fishery Organisations from the Black Sea Region
RO	AROP	Asociatia RO-Pescador	Association RO-Pescador
SE	Gävlefisk	Procucentorganisationen Gävlefisk	Gävlefisk Producers Organisation

Country	Organisation	Full name in original language	Full name in English
SE	HKPO	Havs- och Kustfiskarnas Producentorganisation	Marine and Coastal Fishermen's Producer Organisation'
SE	NKFPO	Norrbottens Kustfiskares Producentorganisation	Coastal Fishermen in Norbotten Producers Organisation
SE	SFPO	Sveriges Fiskares Producentorganisation	Swedish Fishermen's Producer Organisation'
SE	SPF	Swedish Pelagic Federation PO	Swedish Pelagic Federation PO
UK	NFFO	National Federation of Fishermen's Organisations	National Federation of Fishermen's Organisations
UK	SFF	Scottish Fishermen's Federation	Scottish Fishermen's Federation

Table 28: Affiliation, collective bargaining and consultation of national business associations and national employer organisations in the sea fisheries sector

Country	Organisation	EU affiliation	Collective bargaining	Consultation
BE	Rederscentrale	EAPO	Yes	Regularly
BG	BG Fish (АПРПБФ)	None	No	Ad hoc
BG	BSSFA (СЧИ)	None	No	Never
CY	Fisheries Employer Association	None	No	Never
CY	Cyprus Multipurpose Vessels Association	None	No	Never
CY	Cyprus Professional Fishers Association of Alongshore Small Vessels Fishing of Intermittent Employment (Category C)	None	No	Never
CY	Cyprus Fishers Association of Alongshore Fishing (Categories A and B)	None	No	Never
DE	DFV	Europêche, COGECA, EUFA, EAPO	No	Ad hoc
DK	DFPO	EAPO	Yes	Regularly
DK	DPPO	EAPO, ASF	Yes	Regularly
EE	EK	None	No	Regularly
EE	EKPL	None	No	Regularly
EE	EKL	None	No	Regularly
EL	DASE	None	No	Never
EL	PEPMA	MEDAC	No	Ad hoc
EL	PEPESA	None	No	Regularly
ES	CEPESCA	Europêche	Yes	Regularly
ES	FNCP	Europêche	No	Regularly
FI	SAKL	None	No	Regularly
FR	UAPF	Europêche	Yes	Regularly

Country	Organisation	EU affiliation	Collective bargaining	Consultation
FR	CFDT-Sympa	None	Yes	Regularly
FR	SNAPP-CFTC	None	No	N/A
FR	FFSPM-PP	None	No	N/A
FR	SNMPA-CGT	None	No	Regularly
IE	<i>ICOS</i>	COGECA	No	N/A
IE	IFPO	None	No	Ad hoc
IE	ISWFPO	None	No	Ad hoc
IE	KFO	None	No	Ad hoc
IT	Federpesca	Europêche	Yes	Ad hoc
IT	<i>Federcoopesca-Confcooperative</i>	COGECA	Yes	Ad hoc
IT	<i>Legacoop Agroalimentare</i>	COGECA	Yes	Ad hoc
IT	<i>AGCI Agrital</i>	COGECA	Yes	Ad hoc
IT	UNCI Agroalimentare	None	Yes	Ad hoc
IT	ANAPI Pesca	None	Yes	Ad hoc
LT	LŽPGA	None	No	Ad hoc
LT	KŽJA	None	No	Ad hoc
LT	ŽŽPA	None	No	Ad hoc
LT	TŽPŽA	None	No	Ad hoc
LV	LZF	None	No	Regularly
LV	LZA	None	No	Regularly
LV	KZA	None	No	Regularly
MT	<i>Koperattivi Malta</i>	Europêche, COGECA	No	N/A
NL	RVZ	Europêche, EAPO	Yes	Regularly
NL	VisNed	Europêche	No	Regularly
NL	Nederlandse Vissersbond	Europêche, EAPO	No	Regularly
PL	PAOP	Europêche, EAPO, EUFA	No	Ad hoc
PT	ADAPI	None	Yes	N/A
PT	FPA	None	Yes	N/A
RO	FOPMN	None	No	Ad hoc
RO	AROP	None	No	Ad hoc
SE	SFPO	None	No	Regularly
SE	SPF	None	No	Regularly
SE	HKPO	None	No	Regularly
SE	NKFPO	None	No	Regularly
SE	Gävlefisk	None	No	Regularly
UK	NFFO	Europêche	No	Regularly
UK	SFF	Europêche	No	Regularly

Notes: N/A = not applicable. Members of Europêche are marked in bold, while members of COGECA are in italics; members of both Europêche and COGECA are in bold and italics.

Annex 2: Network of Eurofound Correspondents

Table 29: Correspondents who contributed to this study

Country	Correspondent	Organisation
Belgium	Dries Van Herreweghe	HIVA–KU Leuven
Bulgaria	Rositsa Antova	Institute of Social and Trade Union Research (ISTUR)
Croatia	Predrag Bejaković Irena Klemencic	Institute of Public Finance (IPF, Institut za javne financije)
Cyprus	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
Denmark	Carsten Jorgensen	FAOS (Employment Relations Research Centre), University of Copenhagen
Estonia	Ingel Kadarik	Praxis Centre for Policy Studies
Finland	Rasmus Firon	Oxford Research AB
France	Frédéric Turlan	IR Share
Germany	Sandra Vogel Birgit Kraemer	German Economic Institute Institute for Economic and Social Research, Hans Boeckler Foundation
Greece	Elena Kousta	GSEE Labour Institute
Ireland	Andy Prendergast	IRN Publishing
Italy	Lisa Dorigatti	Department of Social and Political Sciences, University of Milan
Latvia	Krišs Karnitis	EPC Ltd
Lithuania	Inga Blaziene	Lithuanian Social Research Centre
Luxembourg	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
Malta	Louis Grech	University of Malta
Netherlands	Amber van der Graaf	Panteia BV
Poland	Marta Trawinska	Foundation Institute of Public Affairs
Portugal	Reinhard Naumann	Friedrich Ebert Foundation (Lisbon)
Romania	Victoria Stoiciu	European Institute of Romania
Slovenia	Barbara Luzar	Faculty of Social Sciences, University of Ljubljana
Spain	Alejandro Godino	Institute for Labour Studies, Universitat Autònoma de Barcelona
Sweden	Sirin Celik (Kara)	Oxford Research AB
United Kingdom	Claire Evans	Warwick Business School

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

The aim of Eurofound's representativeness studies is to identify the relevant national and European social partner organisations. This study identified the Association of National Organisations of Fishing Enterprises in the European Union (Europêche) (representing employers) and European Transport Workers' Federation (ETF) (representing employees) as the most representative European level social partner organisations in the sea fisheries sector. COPA-COGECA, representing employers in the primary sector, has also some representativeness in the sector.

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

