Eurofound

Representativeness of the European social partner organisations: Port sector

This study provides information designed to aid sectoral social dialogue in the ports sector. The study includes a summary of the sector's economic and employment background, an analysis of the relevant social partner organisations in all EU Member States – including their membership, role in collective bargaining, social dialogue and public policy, and national and European affiliations – and an overview of relevant European organisations, particularly their membership composition and their capacity to negotiate. The aim of Eurofound's series of representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. Top-down and bottom-up analysis of the ports sector in the EU28 shows that ETF and IDC on the employee side and FEPORT and ESPO on the employer side ought to be regarded as the main EU-wide representatives of the sector's workforce and businesses.

Introduction

Objectives of study

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

To accomplish these aims, the study first identifies the relevant national social partner organisations in the ports sector, subsequently analysing the structure of the sector's relevant European organisations and, in particular, their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is 'sector-related'.

Table 1: Determining the 'sector-relatedness' of an organisation

Scope	Question in the standardised questionnaire to all correspondents	Possible answers	Note and explanations
Domain of the organisation within the sector	Does the domain of the trade union/employer organisation potentially cover: • the entire ports sector, including all of its sub-activities as a whole?	Yes/No	This question refers to the economic sub-activities of the NACE code chosen. Some organisations may delimit their domain to only part of the sub-activities
	• all occupations within the ports sector among both blue-collar workers and white-collar workers?	Yes/No	Some trade unions may delimit their domain to certain occupations or categories of workers only

	• all forms and size classes of enterprises (for instance: public ownership, private ownership, multinationals, domestic companies, SMEs, etc. – of course only insofar as they exist in the sector)?	Yes/No	Some organisations may delimit their domain, for instance, to public-sector companies/employees or SMEs only
	• employees/companies, within the sector, in all regions of the country?	Yes/No	Some organisations may delimit their domain to certain regions instead of the entire territory of the country
Domain of the organisation outside the sector	• employees/companies/business activities outside the ports sector?	Yes/No	Some organisations may enlarge their domain to other activities not included in the ports sector

Source: Standardised questionnaire sent to the Eurofound network of European correspondents (2014–2015)

At both national and European levels, many associations exist which are not considered to be social partner organisations as they do not essentially deal with industrial relations. Thus, there is a need for criteria to clearly differentiate the social partner organisations from other associations.

As regards the national-level associations, classification as a sector-related social partner organisation implies fulfilling one of the following two criteria:

- being a party to 'sector-related' collective bargaining;
- being a member of a 'sector-related' European association of business or labour that is on the Commission's list of European social partner organisations consulted under Article 154 of the TFEU and/or participates in the sector-related European social dialogue.

Taking affiliation to a European social partner organisation as a sufficient criterion for determining a national association as a social partner does not necessarily imply that the association is involved in industrial relations in its own country. Hence, this selection criterion may seem odd at first glance. However, if a national association is a member of a European social partner organisation, it becomes involved in industrial relations matters through its membership of the European organisation – through informal communication, consultation procedures and eventually the implementation of agreements concluded by the European social partners at national level.

Furthermore, it is important to assess whether the national affiliates to the European social partner organisations are engaged in industrial relations in their respective country. Affiliation to a European social partner organisation and/or involvement in national collective bargaining are of utmost importance to the European social dialogue, since they are the two constituent mechanisms that can systematically connect the national and European levels.

For the purpose of this study, a European association is considered a relevant sector-related interest organisation if it meets the following criteria:

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

In addition, this study considers any other European association with sector-related national social partner organisations – as defined above – under its umbrella.

Thus, the aim of identifying the sector-related national and European social partner organisations applies both a 'top-down' and 'bottom-up' approach.

Definitions used

For the purpose of this study, the ports sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (*Nomenclature statistique des activités économiques dans la Communauté européenne*, NACE), to ensure the cross-national comparability of the findings. The NACE code reflects the field of activities covered by the European Sectoral Social Dialogue Committee 'Ports' as demarcated by the social partners in agreement with the European Commission. More specifically, the ports sector is defined as embracing NACE (Rev. 2) 49.50, 50.10, 50.20, 52.10 and the whole group 52.2 with the exception of class 52.23.

This includes the following activities:

NACE Rev. 2	
49.50	Transport via pipeline
50.10	Sea and coastal passenger water transport
50.20	Sea and coastal freight water transport
52.10	Warehousing and storage
52.21	Service activities incidental to land transportation
52.22	Service activities incidental to water transportation
52.24	Cargo handling
52.29	Other transportation support activities

The domains of the trade unions and employer organisations and scope of the relevant collective agreements are likely to vary from this precise NACE definition. The study therefore includes all trade unions, employer organisations and collective agreements which are 'sector-related' in terms of any of the following four patterns:

- congruence – the domain of the organisation or purview of the collective agreement is identical to the NACE demarcation;
- sectionalism – the domain or purview covers only a certain part of the sector as demarcated by NACE classification, while no group outside the sector is covered;
- overlap – the domain or purview covers the entire sector together with (parts of) one or more other sectors. However, it is important to note that the study does not include general associations which do not deal with sector-specific matters;
- sectional overlap – the domain or purview covers part of the sector plus (parts of) one or more other sectors.

Figure 1: Sector-relatedness of social partner organisations: possible domain patterns

Table 2: Domain pattern and purview of the organisation's domain

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the union's/employer organisation's domain embrace potentially all employees in the ports sector?	Does the union/employer organisation also represent potentially members outside the ports sector?
Congruence (C)	Yes	No
Sectionalism (S)	No	No
Overlap (O)	Yes	Yes
Sectional overlap (SO)	No	Yes

Sectoral Social Dialogue Committee

At European level, the Sectoral Social Dialogue Committee (SSDC) for the ports sector was set up in June 2013 in response to a joint request by the European Transport Workers' Federation (ETF) and the International Dockworkers Council (IDC) on the employees' side, and the Federation of European Private Port Operators (FEPORT) and the European Sea Ports Organisation (ESPO) on the employers' side. In line with the conceptualisation of this study as outlined above, affiliation to one of these four European organisations – ETF, IDC, FEPORT and ESPO – is a sufficient criterion for classifying a national association of one of the 28 EU Member States as a relevant social partner organisation for the purpose of this study. However, it should be noted that the constituent criterion is one of sector-related membership. This is important, particularly in the case of ETF due to its sector-overlapping membership domain. Thus, the study will include only those affiliates to ETF whose domain relates to the ports sector, as defined earlier.

Collection of data

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on country reports provided by Eurofound's network of European correspondents – industrial relations experts in the 28 EU Member States, plus Norway. The correspondents complete a standard questionnaire by contacting the sector-related social partner organisations in their countries. The contact is generally made via telephone interviews in the first place, but might also be – in certain cases – established via email. In case of the unavailability of any representative, the national correspondents are asked to fill out the relevant questionnaire based on secondary sources, such as information given on the social partner's website, or derived from previous research studies.

It is often difficult to find precise quantitative data. In such cases, the correspondents are requested to provide rough estimates rather than leaving a question blank, given the practical and political relevance of this study. However, if there is any doubt over the reliability of an estimate, this will be noted.

In principle, quantitative data may stem from three sources:

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

While the data sources of the economic figures cited in the report are generally statistics, the figures regarding the organisations are usually either administrative data or estimates. Furthermore, it should be noted that several country studies also present data on trade unions and business associations that do not meet the above definition of a sector-related social partner organisation, in order to give a complete picture of the sector's associational 'landscape'. For the above substantive reasons, as well as for methodological reasons of cross-national comparability, such trade unions and business associations will not be considered in this overview report. However, these organisations can still be found in the national contributions available on demand.

Quality assurance

In order to ensure the quality of the information gathered, several verification procedures and feedback loops have been included in the process of drawing up this study.

- First, the coordinators, in collaboration with Eurofound staff, check the consistency of the national contributions.
- Second, Eurofound sends the national contributions to the national members of its Governing Board, as well as to the European-level sector-related social partner organisations. The peak-level organisations then ask their affiliates to verify the information. Feedback received from the sector-related organisations is then taken into account, if it is in line with the methodology of the study.
- Finally, the complete study is evaluated by the European-level sectoral social partners and Eurofound's Advisory Committee on Industrial Relations, which consists of representatives from both sides of industry, governments and the European Commission.

Structure of report

The study consists of three main parts, beginning with a brief summary of the sector's economic background. The report then analyses the relevant social partner organisations in all 28 EU

Member States. The third part of the analysis considers the representative associations at European level.

Parts two and three contain a brief introduction explaining the concept of representativeness in greater detail, followed by the study findings. As representativeness is a complex issue, it requires separate consideration at national and European level for two reasons. Firstly, the method applied by national regulations and practices to capture representativeness has to be taken into account. Secondly, the national and European organisations differ in their tasks and scope of activities. The concept of representativeness must therefore be suited to this difference.

Finally, 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 reach any definite conclusion on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for admission to the European social dialogue. The reason for this is that defining criteria for adequate representativeness is, at the end of the day, a matter for political decision rather than an issue of research analysis.

Economic and employment trends

Economic characteristics and trends

The ports sector, as defined in terms of the NACE classification system (see above) for the purpose of this study, is quite large. It covers not only ports activities in a narrow sense – that is, the operation of terminal facilities such as harbours and piers and directly related other activities, such as the operation of waterway locks, navigation, pilotage, berthing and lighthouse activities – but also business activities of the broader transport and logistics sector which may be only indirectly related to genuine ports activities. This is because ports function as 'central nodes in an increasingly multimodal transport system which ensures the interconnection of maritime, inland waterway, road and rail carriage' (Portius 2013, p.9). Port operations thus impact on the entire transport chain and, as a consequence, on the economy of the Member States and the European Union (EU) as a whole. The complexity of the sector in terms of business activities makes it difficult to assess its size in terms of company and employment numbers. According to the European Commission (EC), in 2013 European maritime ports employed 1.5 million workers, and the same number were employed indirectly in the sector in the then 22 EU maritime Member States (IP/13/562). There are more than 1,200 commercial seaports operating along the EU's coasts; this means that Europe is one of the densest port regions worldwide. The Union is highly dependent on seaports as the gateways to the European continent. 74% of all goods imported or exported are shipped through ports, and 37% of the intra-EU freight traffic transit through seaports. Moreover, according to the ESPO website, more than 400 million passengers pass through ports each year. In terms of cargo handling, around 3.7 billion tonnes of cargo transited through European ports in 2013.

According to the Portius (2013, p.140) report, European seaports are managed by a variety of organisations, among which the most important are municipalities – prevalent in northern Europe – (agencies of) the central state – prevalent in southern Europe – and commercial private businesses (which corresponds to the Anglo-Saxon model). The port industry thus comprises both the public and the private sectors. EU seaports increasingly 'prefer to operate as landlords who manage port infrastructure but leave the provision of handling and terminal services to private operators', often to several competing enterprises (Portius, 2013). Since the access to the port labour market is – according to the EC (COM [2013] 295 final) – relatively restricted under national law in some Member States, the EC launched two proposals for a Port Service Directive to liberalise the port labour market in the early 2000s. However, these proposals were rejected by the European Parliament.

Although the European port sector continued to be a growing industry until 2008, with a 50% increase in cargo handled in EU ports predicted by 2030 (MEMO/13/448), the 2008 recession has significantly affected the port industry. According to Eurostat statistics, the gross weight of seaborne goods handled in EU ports fell from 3.97 to 3.47 billion tonnes in the period 2007–9, with a slight recovery in 2010 (3.67 billion tonnes) and a levelling out at about 3.7 billion tonnes since then. According to survey data gathered by ESPO and published in the ESPO Port Performance Dashboard 2013, conventional general cargo and dry bulk cargo were strongly affected by the crisis and continued to remain 10% lower than 2005 levels up to 2012. In contrast, container volumes were also affected by the recession but swiftly recovered from 2010 onwards.

Irrespective of the recent recession, the European ports sector faces a number of structural problems and challenges. One particularly pressing issue is the future shape and direction of the sector. Over the next one or two decades, EU ports are likely to experience a growth in traffic and will need to adapt to a new generation and type of ships (in particular, ultra-large container ships, new types of Ro-Ro ferries and gas carriers). Further challenges are likely to include significant developments in the energy trades (gas and renewable energy sources such as biomass). Moreover, structural problems such as the ports' 'insufficient connectivity to the hinterland, the lack of transparency in the use of public funds, market entry barriers, outdated governance models and excessive bureaucracy' (COM [2013] 295 final, p.13) have to be addressed.

Employment characteristics and trends

Employment in the European ports sector is characterised by a clear prevalence of male workers. Unfortunately, Eurostat LFS data are not available for the sector as defined for the purpose of this study. However, national statistics drawn on the national reports of Eurofound's network of European correspondents indicate that male employment numbers are at least three times as high as female numbers in most countries for which data are available. In the ports sector in a narrow sense, in particular among port workers (dockers) predominantly performing manual work, the prevalence of men is likely to be even more pronounced. Against this background, in October 2014 the SSDC in the ports sector launched a joint initiative ('Recommendations on Women's Employment in the Port Sector') to promote female employment in the sector. According to this document, due to changing features of dock labour, a general trend of steadily increasing female employment rates in port work professions is observable.

Qualification and training systems in the ports sector widely vary across the EU Member States. In a joint attempt to improve the skills of port workers in the medium term, the SSDC agreed upon a work programme, Training and Qualifications. In this document, the European sectoral social partners commit themselves to developing 'European guidelines for the establishment of training requirements that take into consideration the future training needs of the sector in the light of technological and logistical changes and changes in customer demand' (Training and Qualifications).

Due to the irregular nature of port traffic, the demand for port labour varies over the business cycle. Therefore, to cope with this fluctuation in labour demand, in several Member States the port labour market is subject to rules that govern 'the reservation of temporary labour for a steadily available complement ('pool') of registered workers who enjoy unemployment benefit or similar pay when there is no work' (Portius 2013, p. 2). According to the Portius report, these rules frequently involve 'restrictions on employment (including priority for registered workers or recognised workforce suppliers, closed shop situations, strict job demarcations, mandatory manning scales, restrictions on temporary agency work and on self-handling) and restrictive working practices', which may have negative trade and competitiveness implications. By contrast, ETF fears that a relaxation of the current port labour regulations would be likely to pave the way for a further liberalisation of the port labour market which may be at odds with safety standards and with the goal of making ports more healthy workplaces. In this context, ETF points to allegedly widespread practices of 'subcontracting part of ports operations to enterprises that do not apply the negotiated labour standards' and deplores 'the lack of protection for workers' right in case of change of concessionaire' (ETF webpage). However, the fact that port work counts as among the most dangerous occupations in the EU economy appears to be undisputed.

Table 3 and Table 4 (data provided by Eurofound's network of European correspondents in Annex 1) give an overview of developments from approximately 2003 to approximately 2013, presenting figures on companies, employment and employees in the sector and in relation to the national economy, from both national sources and Eurostat. In all 13 Member States (except Denmark and Luxembourg) for which related data are available from the correspondents, the number of companies increased. However, it is uncertain whether this growth actually reflects a general expansion of the sector in these countries or just a process of fragmentation of the sector's company structure, and/or the emergence of a cohort of self-employed workers. In some countries, such as the Czech Republic, Latvia, the Netherlands, Romania, Slovakia and Slovenia, the number of companies increased by more than 50% in the same ten-year period. The situation in the UK is unclear, since the data of the two reference years are not comparable.

Five of the only nine countries with available data record an increase in overall employment within the sector in the same time period, while in four countries employment fell. Losses in employment were most marked in the Czech Republic, although to such an extent that the reliability of the figures provided must be questioned. Employment figures more than doubled in the decade from 2003 to 2013 in Hungary and Slovakia. The employment data of the two reference years for the UK are again not comparable. In terms of the number of sectoral employees, four countries record a decrease during this time period, while in nine countries this indicator increased (for 15 countries no comparable data are available). In all countries with available data on both measures, the number of employees with a contractual relationship comes close to the total number of employed. One can infer from these findings that, at least in these countries, the incidence of non-standard employment arrangements in the sector is low.

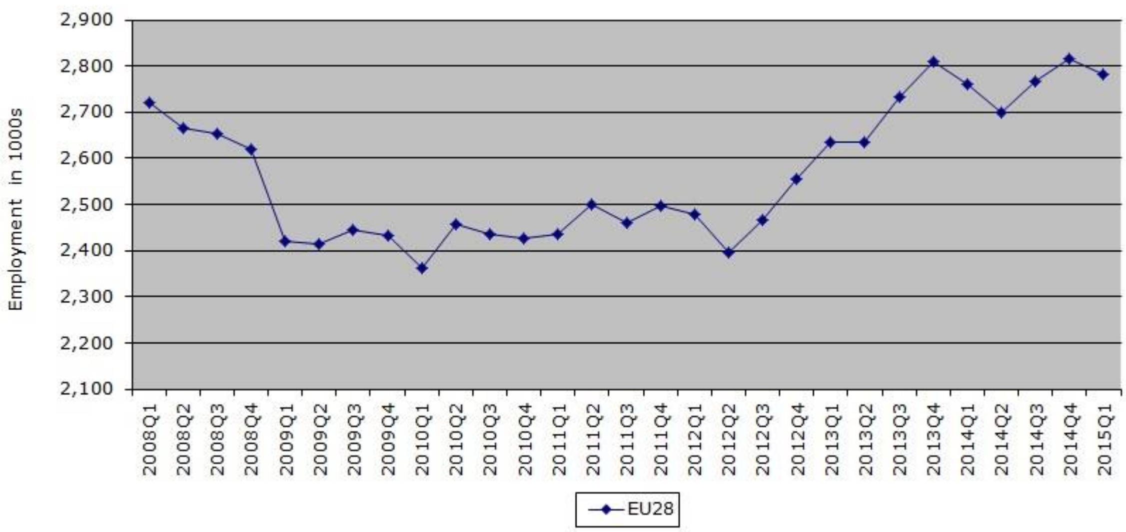
Table 3 and Table 4 (Annex 1) also corroborate the finding outlined above that men make up the vast majority of workers in the ports sector. In all countries with available data, men by far outnumber female employees, representing at least 70% or 80% of the sector's total workforce. The tables also indicate that the sector as defined for the purpose of this study is quite large in some Member States. In terms of employment share, the ports sector proved quite dynamic during the decade to the early 2010s in most countries with available data, with six countries showing an upward trend and three countries showing a downward trend in the share of sectoral employees as a proportion of the total number of employees in a national economy, while in four countries this share remained largely unchanged over the ten-year period. The ports sector's share in the number of aggregate employees ranges from 0.2% in Luxembourg to 3.3% in Malta and 4.4% in Croatia (although the latter figure is questionable), while for 10 countries no related data for 2013 (or the most recent year for which data are available) have been reported. In terms of absolute numbers of sectoral workers, there are three countries recording more than 100,000 who were gainfully employed in the sector in the early 2010s – that is Germany, Italy and the UK. Germany records more than 600,000 workers in the sector.

The impact of the recession from 2008 onwards on the ports sector varied between countries, according to the country reports. Overall, at least in terms of employment, the ports sector appears to have suffered severely from the recession, even though a comparison in this respect with other services industries does not give a clear picture.

Figure 2 shows that, overall in the European Union, employment in the warehousing and support activities for transportation sector apparently was hard hit by the recession. Employment for the 15–64 age group abruptly declined from about 2.7 million in 2008 to about 2.4 million in 2009. In the years following up to 2012, the sectoral employment figures levelled out significantly below the pre-crisis level, at between 2.4 and 2.5 million. Pre-crisis levels were reached no earlier than

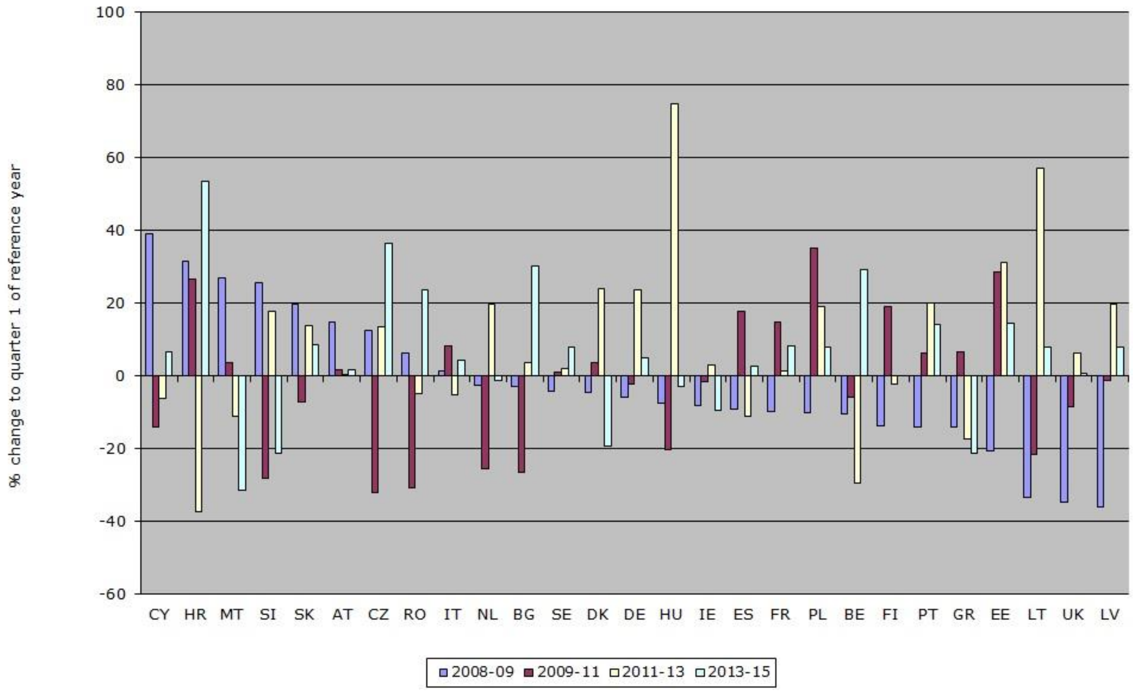
2013, with peaks of slightly more than 2.8 million in the fourth quarters of 2013 and 2014. Apart from these overall employment developments over recent years, Figure 2 does not show any cyclical development within each year of observation. Rather, the curve runs erratically within each year. This indicates that employment variations in the sector within a year are caused by indefinite economic rather than regular seasonal fluctuations. However, it is important to note that Figure 2 refers to the warehousing and support activities for the transportation sector according to NACE (Rev.2) code 52, rather than to the ports sector as demarcated for the purpose of this study. This is because Eurostat LFS statistics do not provide distinct employment data for the ports sector.

Figure 2: Overall development of employment (workforce aged 15–64) during the recession in the EU28 warehousing and support activities for transportation sector, total numbers



Source: Eurostat, Labour Force Survey (LFS), 2015

Figure 3: Member States' development of employment (workforce aged 15–64) during the recession in the warehousing and support activities for transportation sector, percentage change to Q1 of the reference year



Source: Eurostat, Labour Force Survey (LFS), 2015, and own calculations on the basis of LFS data. No data available for Luxembourg. For a few countries, such as Croatia, Estonia, Lithuania and Slovenia, the data may be unreliable according to Eurostat.

Note: Since Eurostat LFS statistics are not available for the ports sector as defined for the purpose of this study, Figures 2 and 3 refer to the Warehousing and support activities for transportation division according to NACE (Rev.2) code 52, which – apart from the Service activities incidental to air transportation class according to NACE (Rev.2) code 52.23 – forms part of the ports sector. The division according to NACE (Rev.2) code 52 represents major parts of the ports sector in virtually all Member States and is thus that statistical unit with available Eurosat LFS employment data which closest corresponds to the sector under scrutiny. However, Transport via pipeline activities according to NACE (Rev.2) code 49.50, Sea and coastal passenger water transport activities according to NACE (Rev.2) code 50.10 and Sea and coastal freight water transport activities according to NACE (Rev.2) code 50.20 are left of consideration in Figure 2 and Figure 3.

In contrast to Figure 2, which gives a view of the overall development of employment in the warehousing and support activities for transportation sector for all EU28 countries on aggregate, Figure 3 provides a picture of employment changes disaggregated by country in this sector. This figure shows the annual or biennial percentage changes of sectoral employment to the first quarter of the reference year (2008 in the case of 2009 and then each previous odd-numbered year for the years 2011, 2013 and 2015) for the period 2008–2015 for each individual Member State.

Figure 3 indicates that, in all EU Member States except Austria, the sector – to at least a certain degree – declined in terms of employment in at least one of the four consecutive periods 2008–9, 2009–2011, 2011–2013 and 2013–2015. According to Figure 3, only nine of the 27 countries for which data are available recorded an increase in sectoral employment in the period 2008–2009, whereas a clear majority of 18 countries recorded a decrease. In the subsequent two-year period, 2009–2011, only a slim majority of 14 countries recorded decreases in sectoral employment, and the number of countries recording employment growths increased to 18 in the period 2011–13 and 19 in the period 2013–2015. Hence, it appears that the impact of the recession on the warehousing and support activities for the transportation sector (including major part of the ports sector) was in most countries particularly strong at the beginning of the crisis but diminished steadily over consecutive years. In only a few countries, such as Belgium, Croatia, Denmark, Malta and Greece, does the crisis appear to have had a delayed effect on the sector's labour market, in that major redundancies came into effect not earlier than 2011–2013. There is only one country – Austria – which records increases for all the four consecutive periods of observation during 2008–2015, while nine countries (Croatia, the Czech Republic, Estonia, France, Italy, Poland, Portugal, Slovakia and Sweden) record increases for three periods of observation. Conversely, no country can be associated with job losses within the sector in all of the four consecutive periods of observation, while job losses in three periods within the seven-year period can be found in Belgium, Greece, Hungary and Ireland. Large-scale declines of more than 30% from one period of observation to the other can be observed in several countries, such as Croatia, the Czech Republic, Latvia, Lithuania, Malta, Romania and the UK. However, the data of Croatia and partially those of Lithuania are assessed by Eurostat to be unreliable (as is also the case of the data given for Estonia and Slovenia). Moreover, increases in sectoral employment of more than 50% within only two years, as indicated in the cases of Croatia, Hungary and Lithuania, appear to be doubtful and thus in need of explanation.

Overall, Figure 3 suggests that both the impact of the recession on the sector and the timing of impact varied greatly between the EU Member States. In this context, it is not possible to link (significant) job losses to only one single cause, that is, the recent recession. Rather, it seems likely that changes in sectoral employment levels within a very short period of time are attributable to a number of causes including global economic trends and country- and sector-specific developments.

National level of interest representation

In many Member States, the statutory regulations explicitly refer to the concept of representativeness when assigning certain rights of interest representation and public governance to trade unions and/ or employer organisations. The most important rights addressed by such regulations include:

- formal recognition as a party to collective bargaining;
- extension of the scope of a multi-employer collective agreement to employers not affiliated to the signatory employer organisation; and
- participation in public policy and tripartite consultation.

Under these circumstances, representativeness is normally measured by the membership strength of the organisations. For instance, in many countries statutory extension provisions allow for extension of collective agreements to unaffiliated employers only when the signatory trade union and employer association represent 50% or more of the employees within the agreement's domain.

As outlined previously, the representativeness of the national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations for participation in European social dialogue. Hence, the role of the national actors in collective bargaining and public policy-making constitutes another important component of representativeness. The relevance of the European sectoral social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate the employment terms and influence national public policies affecting the sector.

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). Social partner organisations that are engaged in multi-employer bargaining are incorporated in state policies to a significantly greater extent than their counterparts in countries where multi-employer bargaining is lacking. This can be attributed to the fact that only multi-employer agreements matter in macroeconomic terms; this in turn gives governments an incentive to persistently seek the cooperation of the social partner organisations. If single-employer bargaining prevails in a country, none of the collective agreements will have a noticeable effect on the economy due to their limited scope. As a result, the basis for generalised tripartite policy concertation will be limited.

In summary, representativeness is a multi-dimensional concept that embraces three basic elements:

- membership domain and strength of the social partner organisations;
- their role in collective bargaining; and
- their role in public policy making.

These elements are discussed below.

Membership domain and strength

The membership domain of an organisation, as formally established by its constitution or name, distinguishes its potential members from other groups which the organisation does not claim to represent. As already explained, this study considers only organisations whose domain relates to the ports sector. However, there is insufficient room in this report to delineate the domain demarcations of all the organisations. Instead, the report notes how they relate to the sector by classifying them according to the four patterns of 'sector-relatedness', as specified earlier. A more detailed description of how an organisation may relate to the sector can be found in Figure 1 above.

There is a difference between strength in terms of the absolute number of members and strength in relative terms. Research usually refers to relative membership strength as the density – in other words, the ratio of actual to potential members.

A difference also arises between trade unions and employer organisations in relation to measuring membership strength. Trade union membership simply means the number of unionised persons. Measuring the membership strength of employer organisations is more complex since they organise collective entities – companies that employ employees. In this case, there are two possible measures of membership strength – one referring to the companies themselves and the other to the employees working in the member companies of an employer organisation.

For a sector study such as this, measures of membership strength of trade unions and employer organisations generally also have to consider how the membership domains relate to the sector. If a domain is not identical with the sector demarcation, the organisation's total density (that is, the density referring to its overall domain) may differ from sector-specific density (that is, the organisation's density referring to the sector).

This report first presents data on the domains and membership strength of the trade unions and then considers those of the employer organisations. As far as sectoral membership numbers are concerned, sectoral densities can be calculated provided the number of employees within the sector is given.

Trade unions

Table 6 presents data on trade union domains and membership strength. It lists all trade unions which meet at least one of the two criteria for classification of a sector-related social partner organisation as defined earlier.

All of the 28 Member States but the Czech Republic record at least one sector-related trade union. In total, 123 sector-related trade unions could be identified. Of these 123 unions, none have demarcated their domain in a way which is largely congruent relative to the sector definition. This is not a surprise, given that artificially defined demarcations of business activities for statistical purposes rather differ from the lines along which employees identify common interests and gather in associations.

Domain demarcations resulting in overlap relative to the sector occur in exactly 12.6% of the cases for which related information is available. Overlap, by and large, arises from two different modes of demarcation:

- general (that is, cross-sectoral) domains (which is the case for ACLVB/CGSLB of Belgium, FNV Bondgenoten and CNV Vakmensen of the Netherlands, NSZZ Solidarnosc of Poland, SITESE of Portugal and UNITE of the UK);
- domains covering the broader transportation and logistics sector or larger parts of or even the entire services sector (as is the case for FSC-CCOO and SMC-UGT of Spain, FGTE-CFDT of France, FIT-CISL of Italy, LJS of Lithuania, LCGB Transport of Luxembourg, SIMAMEVIP of Portugal and RMT of the UK).

Sectional overlaps prevail in the sector and occur in exactly 56.3% of the cases for which information is available. This mode usually emanates from domain demarcations which focus on certain categories of employees which are then organised across several or all sectors; moreover this mode can be found with trade unions representing employees in segments of the economy sectionalistically overlapping with the ports sector. Employee categories are specified by various parameters, such as:

- distinct occupations (for instance: professionals and managers, see BBTK/SETCa of Belgium, FT-CFE-CGC of France and Ledarna of Sweden; graduate engineers, see MMF of Denmark, FEA of Finland and SI of Sweden; seafarers and fishery workers, see FZZMiR and KSMMiR of Poland and FESMAR of Portugal; or administrative staff and general operatives, see SIPTU and UNITE of Ireland.);
- employment status (for instance: white-collar workers, as in the case of GPA-djp of Austria, LBC-NVK and BBTK/SETCa of Belgium, Finland’s ERTO and Pro, Sweden’s Unionen and TSSA of the UK; or blue-collar workers, as in the case of PRO-GE of Austria, ABVV-BTB/FGTB-UBT and ACV/CSC of Belgium, 3F of Denmark and Transport of Sweden.);
- geographic region (for instance: Spain’s FGAMT-CIG, which represents Galician workers; and ELA Zerbitzuak and LAB Sindikatua both representing Basque workers.).

Other trade unions’ domains cover part of the ports sector in terms of business activities (rather than in terms of employee categories) in addition to (parts of) at least another sector. Such domains may, for instance, cover:

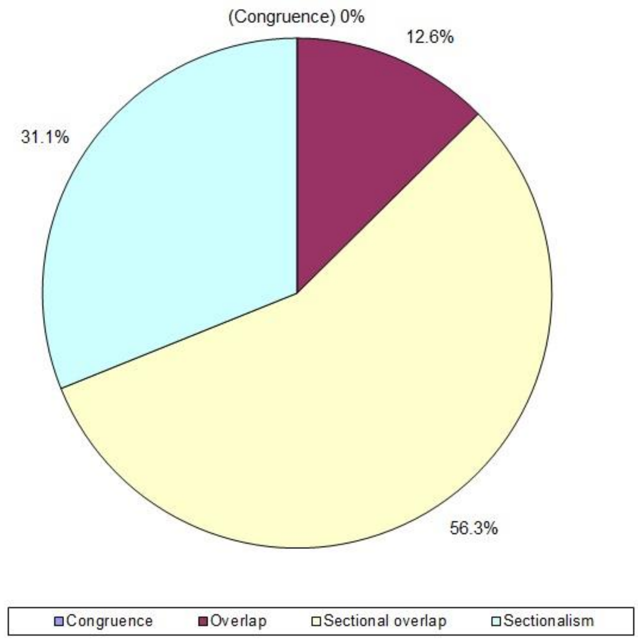
- (part of) the general public sector (for instance, JHL of Finland and IMPACT of Ireland);
- (part of) the private sector (for instance, OMEPEGE-SEK and SEGDAMELIN-PEO of Cyprus, PASENT of Greece and Unionen of Sweden);
- the entire transport and logistics sector with the exception of, for instance, the segment which covers transport via pipelines (for instance, ver.di of Germany, AKT and PARDIA of Finland, FILT-CGIL, UIL Trasporti and FILCTEM-CGIL of Italy and WZZPGM of Poland) etc.

Last, but not least, sectionalism is also common in the sector, with a share of 31.1% of trade unions (for which related information is available) recording this mode of domain demarcation relative to the sector. Sectionalism ensues from the existence of sector-specific trade unions which represent – in terms of employee category – one or more particular grades/professions related to the ports sector, without any representational domain outside the sector. Such professions comprise dockers and port workers (as in the case of SLRH of Croatia, FNSM-CGT of France, DPS/IDU of Lithuania, MDU of Malta, KSPM NSZZ Solidarnosc of Poland, SETC and FNSTP of Portugal and SHF of Sweden); seafarers (as in the case of PNO of Greece, SUI of Ireland, LTFJA of Latvia, SPS of Slovenia and CETM of Spain); maritime officers (as in the case of SL of Denmark, FSU of Finland, FOMM-CGT of France and SBF of Sweden); maritime pilots (as in the case of FMPA of Finland and Lotsförbundet of Sweden); or port managers and administrative port staff (see FNCAMPD-CGC of France and OMYLE of Greece). Moreover, in some countries there are trade unions representing workers in just one port (see SSLRLP, SSLRLD, NSZRL, SSZRL, LSS, NSPLS and SSZLV of Croatia, DUPPA of Greece, STPA of Portugal and SZPD of Slovenia).

Those trade unions whose membership domain does not cover the entire ports sector have delimited their domain primarily in terms of occupations and economic activities rather than (legal) form/size of enterprise and region. The vast majority of the trade unions with a domain that is sectional or sectionally overlapping relative to the sector have a domain which does not cover either all occupations or all economic activities within the sector. Only Croatia, Greece, Portugal, Slovenia and Spain record one or more trade unions which have demarcated their membership in terms of geographic region (provinces in the case of Spain and port sites in the case of the four other countries). Trade union membership domains explicitly demarcated in terms of (legal) forms of enterprise can only be found in a few countries, such as Greece, where OMYLE organises only public-sector port workers, and Finland and Ireland, where there is one trade union each (JHL and IMPACT, respectively) representing employees of the general public sector.

The ports sector's associational 'landscape' on the side of organised labour is characterised by a predominance of relatively highly specialised trade unions with a clear-cut and often narrow membership domain, mostly focusing on a particular occupational subgroup within the sector's workforce. This is reflected by the fact that close to 90% of the sector-related trade unions for which relevant information is available record a membership domain which is sectional or sectionally overlapping relative to the sector. Such specialisation tends to foster high unionisation rates, since unions representing a homogeneous workforce are more likely to mobilise around a limited number of interests that are shared by most members (see Müller-Jentsch 1988, pp. 177–178). According to a number of national reports, in particular those from Denmark, Finland, Ireland, the Netherlands, Poland and the UK, the ports sector is highly unionised, at least by their respective national standards.

Figure 4: Distribution of membership domain patterns of sector-related trade unions with regard to the ports sector (N=119)



Source: Eurofound's network of European correspondents (2014–2015); percentages are rounded

Member recruitment seems to be more successful in the ports industry compared with most other sectors. This is despite the fact that many manual workers record relatively low average skill levels, in particular those dockers who perform the most dangerous work (such as cargo handling, loading and unloading activities). Moreover, the incidence of migrants among these port workers may be high in many instances. Both factors are generally deemed unfavourable to member recruitment. However, port work generally records a long tradition of trade unionism.

Moreover, as outlined earlier in this report, in many countries sector-specific laws, regulations and collective agreements have restricted access to the port labour market for a long time (Portius, 2013). In most cases, this means that a registration or 'pool' system is in place (providing for a particular form of employment security and unemployment benefit system) which helps perform two functions; to accommodate the fluctuations in labour demand, and ensure that the registered workforce is equipped with the appropriate knowledge and experience.

Such 'closed shop' arrangements, in turn, tend to foster unionisiation rates, since they set selective incentives to join a union (Olson, 1965). Apart from that, the predominance of male workers in the ports industry may also contribute to high unionisation rates, although the gender effects on union density are generally highly disputed (Schnabel, 2013). Furthermore, the large size of many port operators and the nature of the employment relationship of many workers (in some instances port workforces have the status of public sector employees since many ports are owned by the state or run as commercial semi-state companies) may also be favourable to high union densities in the sector (Schnabel, 2013).

As the domains of the trade unions often overlap with the demarcation of the sector, so do their sectoral domains with one another in the case of those countries with a pluralist trade union 'landscape' in the ports sector. Table 6 and Table 7 show these inter-union sectoral domain overlaps. In the pluralist trade union systems (recording more than one sector-related trade union) of Croatia, Finland, Greece, Ireland, Romania and Slovakia, no case of inter-union domain overlap within the sector can be observed. In all other countries (Austria, Belgium, Bulgaria, Cyprus, Denmark, Estonia, France, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Slovenia, Spain, Sweden and the UK) with more than one sector-related trade union, the sectoral domain of at least one of them overlaps with the sectoral domain of at least one other. Depending on the scale of mutual overlap, this results in competition for members. Noticeable inter-union competition for members within the sector is recorded in eight countries: Bulgaria, Estonia, France, Luxembourg, Malta, Portugal, Spain and Sweden.

The available information suggests membership of the sector-related trade unions is voluntary in all cases but one, ACV-CSC Transcom of Belgium. This union generally relies on voluntary membership; however, for some grades and functions in the ports sector, membership is obligatory in line with sector-specific closed shop provisions.

The absolute numbers of trade union members differ widely, ranging from more than two million (in the case of Germany's ver.di) to only slightly more than a dozen (in the case of Croatia's SSZLV). This considerable variation reflects differences in the size of economies and the comprehensiveness of the membership domain rather than the ability to attract members. Hence, density is the measure of membership strength which is more appropriate to a comparative analysis. (This holds true despite the fact that the density figures gathered and calculated for the purpose of this study may in some cases be unreliable.) Therefore this report considers densities referring to the sector (*sectoral* density), given that both a trade union's membership within the sector and the number of employees in the sector are provided. Moreover, some tentative information (without providing figures) on the trade unions' *sectoral domain* density in relation to their overall *domain* density is available for those unions with a domain (sectionally) overlapping with regard to the sector (see below). As far as *sectoral* density figures are provided in this section, it should be noted that these figures refer to net ratios, which means that they are calculated on the basis of active employees only, rather than taking into account all union members (those in job and those who are not). This is mainly because research usually considers net union densities to be more informative than gross densities. The former measure tends to reflect unionisation trends among the active workforce quicker and more appropriately than the latter – only the active workforce is capable of taking industrial action, and active members tend to pay higher membership fees than retirees, unemployed and students.

More than 60% of the trade unions with available data record a *sectoral* density (calculated as the ratio of the number of members within the sector to the total number of employees within the sector) lower than 5%. *Sectoral* density is 30% or lower in the case of 94% of the trade unions which document figures on density. There are two possible explanations for the overall very low *sectoral* densities of the sector-related trade unions: low densities with regard to the unions' sectoral domain (*sectoral domain* densities); and their generally small size (in terms of sectoral membership domain) in relation to the sector. Whereas only tentative information is available for the former issue (see below), the latter appears to apply to many of the sector-related trade unions.

This is indicated by two interrelated facts. First, almost 90% of the unions have a membership domain which is sectionalist or sectionally overlapping relative to the sector and thus covers only part of the sector. Second, 123 sector-related trade unions could be identified, with almost all Member States recording a pluralist associational system on the side of organised labour in the sector. *Sectoral* densities of individual associations tend to fall with growing numbers of competitors and thus become less significant as a measure for individual organisational strength relative to the sector. In any case, overall conclusions from the available figures on *sectoral* density have to be drawn with the utmost caution, since clearly sectoral density data can be calculated for less than half of the 123 sector-related trade union.

Comparing the trade unions' overall *domain* densities with their *sectoral domain* densities provides an indication of whether or not the ports sector tends to be a stronghold of those sector-related trade unions which also organise employees in sectors other than the ports industry. The correspondents were asked to give a substantiated estimate of the relationship between these two densities, if possible, without providing exact figures. Accordingly, the numbers of the trade unions (for which information is available) recording a *sectoral domain* density lower than and higher than their overall *domain* density, respectively, are almost equal. At first glance, this result is astonishing, since andecdotal evidence depicted in several national reports indicating relatively high unionisation rates would suggest a majority of unions recording a *sectoral domain* density higher than their overall *domain* density. However, first, it has to be considered that relevant information has been provided for only about one-third of the sector-related trade unions; moreover, some of the answers to this question might eventually be unreliable. Second, many of the sector-related trade unions may – apart from the ports sector – organise other parts of the strongly unionised transportation sector, such that the ports sector does not necessarily stand out against a union's overall domain in terms of membership strength. Nevertheless, the quantitative results alone do not show that overall the ports sector could be qualified as a stronghold of those trade unions with a membership domain (sectionally) overlapping relative to the sector.

In conclusion, the study reveals that in the ports sector there are many occupational trade unions which often record relatively narrow membership domains. This may favour a particularistic representation of collective interests on behalf of small professional groups. Nevertheless, the quantitative data gathered in this study do not indicate that union density rates in the ports sector would be particularly high. This may partially ensue from the shortcomings in relation to data availability (due to the particular sector definition in terms of NACE code) and the existing data set. Contextual information drawn on the national reports, however, suggests that, at least in some Member States, densities of the sector-related unions tend to be high. Relatively high densities within the sector can be explained by a range of factors, such as a strictly regulated labour market in the sector in several countries; public sector employment relationships in some instances; a long tradition of trade unionism in the sector; the large size of many ports; and – in some circumstances – the predominance of men among the port workers.

Employer organisations

Table 8 and Table 9 (Annex 1) present the membership data for the employer/business organisations in the ports sector. Overall, 55 sector-related employer/business organisations have been identified. This is less than half of the number of sector-related trade unions. For 20 of the 28 Member States, at least one sector-related employer organisation is documented. In eight countries, all from the recently acceded Member States – Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Malta, Poland and Slovenia – no sector-related employer organisation has been found. In eight countries – Croatia, Germany, Ireland, Lithuania, the Netherlands, Romania, Slovakia and Spain – only one sector-related employer organisation matching at least one of the two criteria for inclusion (see above) has been identified. In the remaining 12 countries pluralist associational systems exist; this means that at least two sector-related employer/business organisations can be found.

Four Member States (that is, Croatia, Greece, Lithuania and Portugal) each record exactly one employer/business organisation which is not a party to collective bargaining, while the UK records two such associations (see Table 9, Annex 1). These associations not involved in sector-related collective bargaining are classified as social partner organisations in this report only due to their affiliation to at least one of the sector-related European-level employer organisations FEPORT and ESPO. Conversely, in 17 of the 20 Member States which record one or more sector-related employer/business organisations, at least one is engaged in sector-related collective bargaining. Generally, business interest organisations may also deal with interests other than those related to industrial relations. Organisations that specialise in matters other than industrial relations are commonly defined as ‘trade associations’ (see Eurofound 2004). Such sector-related trade associations also exist in the ports sector. In terms of their *national* scope of activities, all of the associations shown in Table 9 as not involved in collective bargaining either primarily or exclusively act as trade associations in their country. Put very simply, trade associations’ main reference is the ‘product’ market (where business has interests in relation to customers and suppliers) rather than the labour market. It is only the conceptual decision to include all associational affiliates to FEPORT and ESPO, regardless of whether they have a role in national bargaining, which gives them, as a working hypothesis, the status of a social partner organisation within the framework of this study.

Of the 55 employer/business organisations listed in Table 8 and Table 9, six organisations belong to this group of trade associations. As outlined above, in eight of the 20 countries which record at least one sector-related employer organisation, only one single organisation (in the meaning of a social partner organisation as defined before) has been established. Thus, compared to the situation on the labour side, where pluralist associational systems exist in 25 of the 27 Member States recording at least one sector-related trade union, on the employer side the incidence of pluralist associational systems is significantly lower (12 of 20 countries with at least one employer organisation). This is in line with the fact that the number of sector-related trade unions across the Member States by far outweighs the number of sector-related employer/business organisations. Overall, as is the case on the trade union side, the employer/business organisations are relatively unevenly distributed among the Member States. In eight countries only one sector-related employer/business organisation is recorded, whereas in a few countries (such as Italy, Portugal and Sweden) six or more such organisations have been established.

The employer/business organisations’ membership domains tend to be even narrower than those of the sector-related trade unions. In contrast to organised labour, membership domains which are sectionalist relative to the sector clearly prevail among the employer organisations, with a share of 52.8% of the cases for which related information is available. Exactly 1.9% (just one case) and 37.7%, respectively, of the associations rest on overlapping and sectionally overlapping domains relative to the sector. The only organisation with an overlapping domain is IBEC of Ireland, and it records a cross-sectoral membership domain, including all activities of the ports sector. By contrast, sectional overlaps relative to the sector are caused by domains covering the following categories.

- The broader defined transport and logistics sector, thus often including also the inland water transport, civil aviation and postal and courier services activities, but representing only the private sector – see WF-FE of Belgium and GT of Latvia; or not representing minor activities within the ports sector, such as transportation via pipeline activities – see TLF of France and Assologista of Italy.
- Several or almost all sectors across the economy, but not representing particular activities within the ports sector, such as sea transport activities – see DI of Denmark; or covering only municipality-owned enterprises – see AVAINTA of Finland.
- Sectors other than the ports industry which sectionally overlap the ports sector to a minor degree, such as the energy, chemical and petroleum industry, covering the transportation via pipeline segment – see FVMI of Austria, CE of Italy and ZCHFP SR of Slovakia.
- Only part of the ports industry (which is nevertheless the core of the representational domain), with a focus on freight forwarding by roads – see FVSp of Austria and BA of Sweden; maritime transport – see DSA of Denmark, FSA of France and AATFL and ACOPE of Portugal; or stevedoring activities – see LJKKA of Lithuania and SAIE of Sweden; while (minor) other activities lie outside the ports sector, including transport consulting, inland water transport, fishing, training and education, research and off-shore activities.

Sectionalism, the prevailing domain pattern in the ports sector among the sector-related employer/business organisations, is caused by domain demarcations that focus on a particular sub-segment of the ports industry, without covering areas of business activity outside the sector. Such subsectors or sub-segments may be defined by the following factors.

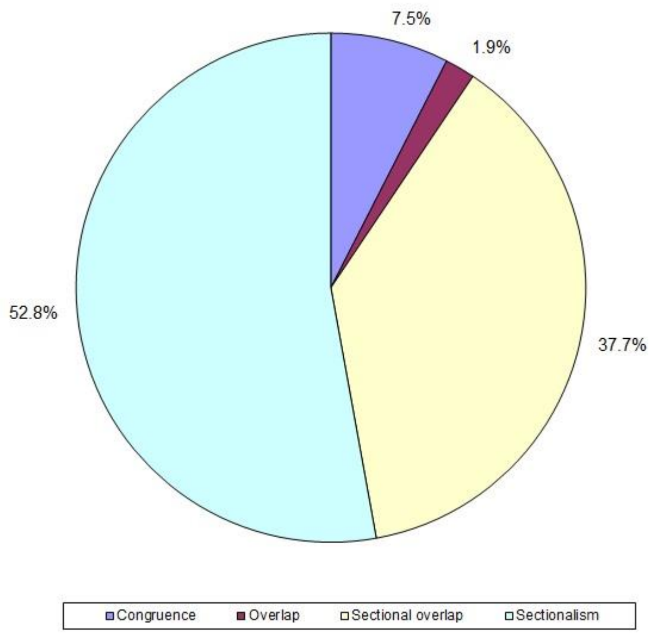
- Ownership structure of the enterprises in the sector, such as private-sector companies – as in the case of Assorimorchiatori of Italy, OP of Romania and SARF of Sweden; or public-sector companies and authorities – as in the case of ELIME of Greece and Assoporti of Italy.
- Specialised activities within the ports sector, such as seaport operating activities – see Belgium's WBH, Germany's ZDS, Finland's FPOA, France's UPF and UNIM, Italy's Assiterminal and FISE-Uniport and Sweden's Sveriges Hamnar; maritime passenger and/or freight water transport activities – see FSA of Finland, SEEN and UGS of Greece, Confitarma and Fedarlinea of Italy, FEDIL Shipping of Luxembourg, ANESCO of Spain and SARF of Sweden; tugging activities – see Assorimorchiatori and Federmorchiatori of Italy; or specialised land transportation activities, either by railways – see Austria's FVSch – or road – see Finland's SHL;
- Geographical region – see AOPL and AOPPDL of Portugal, representing the ports of Lisbon and the northern regions of Portugal respectively, and OP of Romania, representing the port operators of the county of Constanta.

Finally, 7.5% of the associations show a membership domain that is more or less congruent with the sector definition. This means that the domain of these organisations largely focuses on the ports sector as defined for the purpose of this study.

In several countries, the sectoral employers have managed to establish specific employer organisations as a particular voice of narrow and clearly distinct business activities within the ports sector. This applies, in particular, to activities such as port operation and maritime transport. However, as outlined earlier in the report, the number of sectoral employer organisations clearly falls short of the number of sector-related trade unions. This implies that the fragmentation of the sector's associational 'landscape' on the employer side is confined to a subgroup of countries only. As indicated above, in eight Member States there is no sector-related employer organisation. Table 8 and Table 9 show that pluralist associational systems on the employer side can – with the exception of Cyprus's two associations – be found exclusively in the EU15. Almost 90% of the associations listed in Table 8 and Table 9 belong to the 'old' EU Member States. This means that in most of the 'new' Member States, the sector's employers face difficulties setting up or are unwilling to set up employer organisations.

According to the national reports, most of the employer organisations with a domain sectional or sectionally overlapping relative to the sector have delimited their domain in terms of business activities, such that they do not cover all activities within the ports sector. Only a minority do not represent all (legal) forms of companies in the sector (in most cases focusing either on private- or public-law enterprises), while domain demarcations in terms of territorial coverage are rare. In countries with a highly fragmented and differentiated associational 'landscape' on the employer side, such as Italy, Portugal and Sweden, the associations' domains tend to be tailor-made for a particular sub-group of employers and businesses within the sector. This may enable these associations to perform a particularistic interest representation on behalf of their members, although their membership strength may vary widely from one organisation to the other. Such a fragmented associational configuration tends to favour the (bargaining) power of organised business in small segments of the economy.

Figure 5: Distribution of membership domain patterns of sector-related employer organisations with regard to the ports sector (N=53)



Source: Eurofound's network of European correspondents (2014–2015); percentages are rounded

All of the four sector-related employer organisations of Austria and WBH of Belgium can rely on obligatory membership. For Austria's associations, this is due to their public-law status as a chamber unit. In Belgium, membership of WBH is mandatory according to the Belgian Port Labour Act. All other sector-related employer/business organisations are – as far as related information has been given – voluntary associations.

In those countries with a pluralist structure in relation to employer organisations, these associations have usually managed to arrive at non-competing and collaborative relationships. Their activities are complementary to each other as a result of inter-associational differentiation, by either (and more prominently) membership demarcation (as is the case, in particular, of Austria, Belgium, Cyprus, Denmark, Finland, Greece, the Netherlands and Portugal) or functions and tasks (as can be found in France, Italy and the UK).

As the figures for membership totals (Table 8) and density (Table 9) indicate, membership strength in terms of both companies and employees varies widely with regard to both the membership domain in general and the sector. Again, as outlined earlier in the context of the trade unions, density figures rather than absolute membership numbers are indicative of membership strength. In the case of the sector-related employer/business organisations, *sectoral* densities in terms of both companies and employees (employed by these companies) can be calculated. However, due to a lack of absolute numbers of sectoral members in terms of both companies and employees for many associations (and due to a lack of sectoral company and employment data in several countries because of the particular sector demarcation); *sectoral* densities can be calculated only for some of them. According to the figures available, about 89%

of employers' organisations and about 52% of business organisations record a *sectoral* density in terms of companies and employees of 5% or below. Whereas the median of the organisations' *sectoral* densities in terms of companies lies at 0.4%, the corresponding median in terms of employees stands at 3.5%. This does not necessarily allow inferences on overall very low densities of the sector-related employer/business organisations in the sector, since *sectoral* densities (in contrast to *sectoral domain* densities) tend to decline with increasing levels of associational fragmentation. Higher *sectoral* densities in terms of employees, compared to those in terms of companies, indicate a higher propensity of the larger companies to associate than among their smaller counterparts. Moreover, as in the case of the sector-related trade unions, some tentative information has been provided on the employer/business organisations' *sectoral domain* density in relation to their overall *domain* density for those associations with a domain (sectionally) overlapping relative to the sector. However, relevant information is available for only very few employer/business organisations, such that an interpretation of these data is not feasible. For that reason, no conclusion can be drawn on whether or not the ports sector constitutes a stronghold of those employer/business organisations with a domain (sectionally) overlapping relative to the sector.

Irrespective of this data unavailability, in both single-organisation and pluralist associational systems, the sector-related employer/business organisations appear to have tailored their membership domain well to a certain part of the ports sector. This enables these organisations to align their policy of interest representation with the specific requirements of their members. In countries where several employer organisations coexist, this associational fragmentation (together with a high specialisation in terms of the associations' constituency) does not rule out the possibility that overall major part of the ports sector is nevertheless covered by the domains of the sector-related organisations altogether. High specialisation of the membership domain in single-organisation systems, however, means that a major part of the sector is not represented by organised business. However, there is no evidence from the data gathered that this might be an impediment to the functioning of industrial relations in the ports sector. By contrast, it does not come as a surprise that those eight Member States without any sector-related employer organisation, all of them 2004/7 accession countries, clearly record less developed industrial relations systems in the sector compared to most other countries. As might be expected, their industrial relations are mainly or exclusively based on single-employer arrangements.

Collective bargaining and its actors

Table 7 lists all of the trade unions engaged in sector-related collective bargaining. Despite numerous cases of inter-union domain overlap and some cases of unclear domain demarcation, in only a few countries (such as Estonia, France, Malta, Portugal, Spain and Sweden) inter-union rivalry for bargaining capacities has been identified. In the case of the sector-related employer organisations, no case of such rivalry has been reported.

The data presented in Table 10 provide an overview of the system of sector-related collective bargaining in the 28 countries under consideration. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (Traxler et al, 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector. To delineate the bargaining system, two further indicators are used.

The first indicator refers to the relevance of multi-employer bargaining, compared with single-employer bargaining. Multi-employer bargaining is defined as being conducted by an employer organisation on behalf of the employer side. In the case of single-employer bargaining, the company or its divisions is the party to the agreement. This includes the cases where two or more companies jointly negotiate an agreement. The relative importance of multi-employer bargaining, measured as a percentage of the total number of employees covered by a collective agreement, therefore provides an indication of the impact of the employer organisations on the overall collective bargaining process.

The second indicator considers whether statutory extension schemes have been applied to the sector. For reasons of brevity, this analysis is confined to extension schemes which widen the scope of a collective agreement to employers not affiliated to the signatory employer organisation; extension regulations targeting the employees are therefore not included in the research. Regulations concerning the employees are not significant for this analysis for two reasons. On the one hand, extending a collective agreement to employees who are not unionised in the company covered by the collective agreement is a standard practice of the ILO, aside from any national legislation. Secondly, employers have good reason to extend a collective agreement concluded by them, even when they are not formally obliged to do so; otherwise, they would create an incentive for their workforce to unionise.

In comparison with employee-related extension procedures, schemes that target the employers are far more significant for the strength of collective bargaining in general and multi-employer bargaining in particular. This is because the employers are capable of refraining from both joining an employer organisation and of entering single-employer bargaining in the context of a purely voluntaristic system. Therefore, employer-related extension practices increase the coverage of multi-employer bargaining. Moreover, when it is pervasive, an extension agreement may encourage more employers to join the controlling employer organisation; such a move then enables them to participate in the bargaining process and to benefit from the organisation's related services in a situation where the respective collective agreement will bind them in any case (Traxler et al, 2001).

Collective bargaining coverage

In terms of the sector's collective bargaining coverage (Table 10), 10 of the 17 countries with available data record a rate of 80% and more. This group of countries comprises Austria, Belgium, Denmark, Finland, France, Italy, the Netherlands, Portugal, Spain and Sweden.

Conversely, there are only two countries with a rate of collective bargaining coverage of 15% or less: Hungary and Slovenia. A third group of countries records medium-range rates of in between 20% and 60%, including countries such as Croatia, Estonia, Latvia, Slovakia and the UK. For as many as 11 countries – Bulgaria, Cyprus, the Czech Republic, Germany, Greece, Ireland, Lithuania, Luxembourg, Malta, Poland and Romania – no data have been provided. This is mainly attributable to the particular demarcation of the ports sector for the purpose of this study.

In Greece, with the introduction of the Economic Stability Mechanism and the First and Second Memoranda of Understanding, 2011 and 2012, agreed with the so-called 'Troika' (IMF, ECB, EC) (see Eurofound 2012), a package of measures curtailing labour law in general and overturning all valid collective agreements in particular was implemented. However, in contrast to other sectors of the economy, the collective bargaining coverage rate in the ports sector is said to have only slightly declined since then. This is because the sectoral collective agreements signed before the radical revision of the national labour regime have largely remained in effect. The actual collective bargaining coverage rate in the sector is not available.

In the case of Portugal, it is not quite clear whether the sector's rate of collective bargaining coverage has dropped since 2011 as a result of the reform of the collective bargaining regulation enacted under the regime of the Memorandum of Understanding between the 'Troika' and the Portuguese government (see Eurofound 2011 and Eurofound 2012a). Accordingly, in 2011 the government suspended the practice of issuing extension decrees in general. In autumn 2012, the government passed a resolution that stipulates new rules for the extension of collective agreements; only those agreements signed by employer organisations representing 50% or more of the workers of a particular sector may be extended. In the ports sector, no extension order has been issued since 2010. Nevertheless, collective bargaining coverage in the sector stands at about 90%.

Similarly, in Romania the Social Dialogue Act of 2011 abolished the national unique collective agreement, which served as a reference point for collective bargaining at all levels, as well as the practice of extending multi-employer agreements at sectoral level (see Eurofound 2011a). As a consequence, the collective bargaining coverage rate in the overall economy fell considerably after 2011. However, the specific consequences for the ports sector are uncertain.

In most of the countries with available information, several factors, which sometimes interact with each other, account for higher coverage rates:

- the predominance of multi-employer bargaining (Table 10);
- the presence of strong sector-related trade unions and employer/business organisations;
- the existence of pervasive extension practices (Table 10).

The group of Member States where sector-related multi-employer bargaining is completely absent consists of 10 countries: Croatia, Estonia, Hungary, Ireland, Latvia, Lithuania, Malta, Poland, Slovenia and the UK. In all these countries, with the exception of Croatia, collective bargaining coverage within the ports sector tends to be low or no information is available. Where collective bargaining takes place, it is based exclusively on company-level arrangements. This group of countries mainly consists of 'new' Member States. Due to the lack of strong, encompassing social partners at least on one of the two sides of industry within the sector in most of these countries, sectoral industrial relations tend to be relatively poorly developed. On the other hand, there is a group of countries with exclusive or prevailing multi-employer arrangements in the sector, comprising 12 countries. As far as information is available, all of them record high or even full collective bargaining coverage rates in the sector. Taking the collective bargaining coverage rate and the share of multi-employer bargaining as indicators for the effectiveness and strength of sectoral industrial relations structures, one can infer from these findings that in slightly less than half of the EU28 the sector's industrial relations structures are quite well-established. In some countries (such as Finland, France and Italy), a multi-level bargaining system combines comprehensive multi-employer bargaining with single-employer agreements. In such cases, the single-employer settlements either complement the multi-employer agreements in matters not regulated by the latter or contain more favourable employment terms than the multi-employer agreements.

The prevalence of multi-employer settlements in the sector is, in a few countries, backed by a significant use of extension practices. According to Table 10, pervasive extension practices in the ports sector are reported for several countries: Finland, France, Luxembourg, Spain and Sweden. As the aim of extension provisions is to make multi-employer agreements generally binding, the provisions for obligatory membership in the chamber system of Austria should also be noted. Obligatory membership creates an extension effect, since the Austrian Federal Economic Chamber (WKO) and its subunits are parties to multi-employer bargaining. The same holds true of the Federation of Belgian Port Employers (WB) of Belgium. A 1972 law (Wet Major) stipulates that all employers employing port workers must be a member of an employer organisation that fulfils special obligations in relation to the port sector and its workers; these employer organisations are, in turn, obliged to join the WB. Another functional equivalent to statutory extension schemes can be found in Italy. According to the country's constitution, minimum conditions of employment must apply to all employees. The country's labour court rulings relate this principle to the multi-employer agreements, to the extent that they are regarded as generally binding.

Participation in public policy

Interest associations may partake in public policy in two basic ways. They may be consulted by the authorities on matters affecting their members; or they may be represented on 'corporatist' – in other words, tripartite – committees and boards of policy concertation. This study considers only cases of consultation and corporatist participation which explicitly relate to sector-specific matters. Consultation processes are not necessarily institutionalised; the organisations consulted by the authorities may vary according to the issues to be addressed and also, over time, depending on changes in government. Moreover, the authorities may initiate a consultation process on occasional rather than a regular basis. Given this variability, in Table 7 and Table 9 only those sector-related trade unions and employer organisations are flagged that are *usually* consulted.

Trade unions

In all of the 27 Member States recording at least one sector-related trade union, with the exceptions of Hungary and Portugal, at least some of the sector-related trade unions are usually (regularly or on occasion) consulted by the authorities. In total, 87% of the sector-related trade unions for which information is available are consulted, through participation in existing tripartite structures and/or in the form of unilateral consultation by the authorities. While for around 44% of those trade unions consultation is regular (generally at least once a year), about 56% are consulted occasionally. Since a multi-union system has been established in 25 of the 27 Member States with sector-related trade unions, one cannot rule out the possibility that the authorities may favour certain trade unions over others or that the unions compete for participation rights. In at least nine (Bulgaria, Croatia, Denmark, Latvia, Luxembourg, Malta, the Netherlands, Romania and Slovakia) of the 25 countries with a multi-union system, any of the existing trade unions may take part in the consultation process. By contrast, in five countries – Finland, Greece, Ireland, Slovenia and Sweden – only some of the sector-related trade unions are usually consulted, while at least one union is not. (For Austria, Belgium, Cyprus, Estonia, France, Italy, Lithuania, Poland, Portugal, Spain and the UK, no conclusions on possible (un)equal consultation practices can be drawn due to a lack of information.) Nevertheless, there is no evidence of inter-union rivalry and/or conflicts over participation in public policy matters in the ports sector in any of the 25 countries with a multi-union system.

Employer organisations

The vast majority (almost 86%) of sector-related employer/business organisations for which related information is available are involved in consultation procedures. In terms of consultation frequency, about 56% of the employer/business organisations for which information is available are consulted on a regular basis, while about 44% are consulted on occasion. In the 13 countries with a multi-organisation system, there are no reports of conflict over participation rights of employer organisations. In the multi-organisation systems of Belgium, Denmark, France, Luxembourg and the UK, where related data of all employer/business organisations are available, all of the ports sector organisations are consulted. In the pluralist systems of Austria, Finland and Sweden, at least one of the employer organisations is usually consulted, while at least one other is not. In 18 of the 20 Member States recording at least one sector-related employer organisation, at least one is involved in consultation procedures. However, for some countries with a pluralist system of employer representation, such as Cyprus, Greece, Italy, the Netherlands and Portugal, no information about consultation practices is available for at least some of the organisations, so it remains unclear whether consultation rights are being attributed to the national organisations in a selective manner or not.

As far as information is provided, in those countries which record sector-related associations of interest representation on both sides of industry, consultation rights are symmetrically attributed to organised labour and business; in other words, at least one organisation on each side is consulted. For Cyprus, Greece and Portugal, however, no evidence can be provided in this respect due to a lack of information for at least one organisation.

Tripartite participation

The findings reveal that genuine sector-specific tripartite bodies have been established in nine countries: Belgium, Bulgaria, Denmark, France, Latvia, Poland, Romania, Spain and the UK. Table 11 lists a total of 12 bodies – one in each country except Romania (which has two) and Denmark (three). The legal basis of these tripartite bodies is either a statute or an agreement between the parties involved. Their tasks largely comprise advice to and consultation of administrative bodies dealing with matters related to ports and transport. In terms of their scope of activities, some bodies specifically focus on skills and training issues (as in the case of all three bodies of Denmark and one body of the UK), while for most other bodies no specification has been provided.

Other bodies listed in some country reports are not taken into account in this study, since they are either bipartite rather than tripartite in terms of composition, or sector-unspecific – in other words cross-sectoral – tripartite bodies for concertation of economic and social policy. These bodies may also address the sector, depending on the particular circumstances and issues that may arise.

European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria, as defined by the European Commission Decision on the establishment of Sectoral Dialogue Committees promoting the Dialogue between the social partners at European level (98/500/EC). Accordingly, a social partner organisation must have the following attributes: It must:

- 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 their effective participation in the work of the Sectoral Dialogue Committees.

Regarding social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. Accordingly, this section on European associations of the ports sector will analyse these organisations' membership domain, the composition of their membership and their ability to negotiate.

As outlined in greater detail below, the study presents detailed data on each two sector-related European associations on the employee side – ETF and IDC – and on the employer side – FEPORT and ESPO. All four are listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU. Hence, the following analysis will concentrate on these four organisations, while providing supplementary information on others that are linked to the sector's national industrial relations actors.

Membership domain

ETF is affiliated to the European Trade Union Confederation (ETUC) and – according to the Preamble of its Constitution – organises European national trade unions representing workers in sectors such as transport (including logistics), fisheries and tourism services. Its membership domain therefore overlaps relative to the sector under consideration. Internally, the ETF structure is divided into sections representing distinct individual modes of transport and allied activities.

The Dockers' Section largely represents the workers of the ports sector in a narrow sense. This section's domain is thus sectional relative to the sector under examination.

According to Article 6 of its Constitution, IDC represents national trade unions and union federations that organise dockworkers. Its membership domain thus comprises ports and is sectional relative to the ports sector as defined for the purpose of this study.

On the employers' side, according to its name and Article 3 of its Statutes, FEPORT represents the interests of European private port operators. Its membership domain is thus sectional relative to the ports sector as demarcated in this study.

ESPO, according to Article 4 of its Statutes, organises nationally representative port authorities, port administrations and port associations within a Member State of the European Union. Hence, its membership domain is sectional relative to the sector.

Both FEPORT and ESPO organise both national employer organisations and individual companies (in the case of FEPORT) and authorities (in the case of ESPO). However, individual entities are not included in this study.

Membership composition

In terms of membership composition, it should be noted that the countries covered by ETF, IDC, FEPORT and ESPO extend beyond the 28 Member States examined in this study. However, the report will only consider these 28 countries.

ETF

For ETF, Table 12 documents a list of membership of sector-related trade unions drawn on the national reports. (It should be noted that only sector-related ETF members are listed in Table 12, which means that they are affiliated to the Dockers' Section of ETF. Correspondingly, in Table 7 a differentiation is made between trade unions affiliated to the Dockers' Section of ETF and those affiliated to any other Section of ETF. In the former case, the unions are labelled by: 'ETF (ports)'.)

Accordingly, at least one direct affiliation is recorded in 23 countries. Only Austria, the Czech Republic, Hungary, Luxembourg and Slovakia do not record any affiliation to ETF's Dockers' Section. Multiple memberships occur in 16 countries. On aggregate, ETF's Dockers' Section counts 50 direct sector-related affiliations from the countries under examination. ETF's Dockers' Section thus covers about 40% of the trade unions listed in Table 6 and Table 7 through direct affiliation. All of the direct members of ETF (Dockers' Section) but two (STPA and FNSTP of Portugal) are involved in collective bargaining related to the ports sector. However, in the case of two affiliates, that is RMT and TSSA of the UK, no information on bargaining involvement has been provided. Insofar as available data on sectoral membership of the national trade unions provide sufficient information on their relative strength, it may be concluded that ETF (Dockers' Section) covers the sector's most important labour representatives. Exceptional cases of uncovered major trade unions in the sector may involve only a few unions, such as Denmark's MMF, Finland's SMU and ERTO, Greek's PNO and PASENT, Italy's Uiltec, Latvia's LTFJA, Poland's OZZOiM and some unions of Sweden. Several of these unions are affiliated to ETF as well, albeit to a Section other than that for Dockers.

IDC

Table 12 also lists the European affiliates to IDC, which are – due to IDC's membership domain – all related to the ports sector. Nine countries are covered through affiliations to this organisation: Cyprus, Denmark, France, Greece, Malta, Portugal, Spain, Sweden and the UK. (The three affiliates of Italy are not taken into account in this report, since they are – according to the national correspondent for Italy – not trade unions.) More than just one affiliation can be found in Greece, Portugal and Spain. The two affiliations from the UK (Tilbury Local Branch and Felixstowe Local Branch) are not considered as multiple memberships, since they are local branches of the general Unite trade union rather than independent unions representing members on their own. Since Unite is not directly affiliated to IDC, but only indirectly through these two subunits, it is regarded as indirect IDC member. The same holds true of Denmark's 3F which is indirectly affiliated to IDC via its Aarhus Dockworkers Union Local Branch. IDC counts 11 direct and two indirect members in nine countries and thus covers about one-tenth of all sector-related trade unions identified in this study. Two IDC affiliates are not involved in sector-related collective bargaining (that is, STPA and FNSTP of Portugal), while all other members conduct bargaining in the sector. Overall, IDC tends to organise the smaller trade unions representing particular niches in the sector or subunits of larger unions, as in the case of the UK's Unite and Denmark's 3F, rather than the big players.

Together, ETF and IDC can claim to be highly representative in the ports sector, in terms of both countries (23 of 28) and trade unions (62 of 123) covered. However, there is a huge difference between the two associations in this regard, since ETF (Dockers' Section) organises about four times as many and covers clearly more than twice as many countries through affiliations from these countries than IDC.

FEPORT

Turning to the employer side, Table 13 lists the members of FEPORT and ESPO. Of the 28 countries under consideration, FEPORT has 12 under its umbrella through direct and indirect associational members from these countries. Multiple memberships of FEPORT occur in two countries (Italy and Portugal, with two affiliates each). On aggregate, according to the country reports from Eurofound's network of European correspondents, FEPORT counts 14 associational members (one of which is an indirect member affiliated via a higher-order unit) from the EU28. This number is higher than the number of associational affiliates included in the membership list as provided by FEPORT in 2014. It appears that this list does not contain all associational members as per July 2015.

Table 9 indicates that associations affiliated to FEPORT and unaffiliated associations co-exist in a series of countries. Sectoral membership data of the respective organisations of these countries do not provide a clear indication of whether the most important associations are affiliated. In almost all countries with a pluralist associational 'landscape' in the sector, some important employer organisations that conduct bargaining are not affiliated to FEPORT. LJKKA of Lithuania is the only FEPORT affiliate that is not engaged in sector-related collective bargaining. It may therefore regard itself as a trade association rather than an industrial relations actor. All other 13 affiliates of FEPORT are involved in sector-related collective bargaining. The 14 FEPORT members cover collective bargaining in 11 of the 12 Member States that record affiliations to FEPORT. Nevertheless, as can be seen from Table 9, the majority of the sector-related employer organisations across the EU involved in sector-related collective bargaining are not affiliated to FEPORT. Hence, most of the relevant national actors within the sector are not under the umbrella of this European organisation.

ESPO

ESPO is the European association of the nationally representative port authorities, port administrations and port associations gathers primarily the major public port operators, which in some cases may have a quasi-monopoly position. Via its eight direct associational members and three companies/authorities, ESPO covers 10 of the 28 Member States under examination. (This information comes from Eurofound's network of European correspondents and, for the three non-associational ESPO affiliates, the membership list provided by ESPO in 2014). This means that 18 countries (10 of those countries recording at least one sector-related employer organisation) are uncovered, including some of the largest Member States as well as those with the largest ports, such as Belgium, Germany, the Netherlands, Poland and Spain. In terms of type of membership, seven countries – Croatia, France, Greece, Italy, Portugal, Sweden and the UK – are linked to ESPO through associations only, while three countries – Bulgaria, Cyprus and Malta – are exclusively covered via affiliated companies or authorities. Multiple memberships can be found in only one country, the UK, which records two associational affiliates to this organisation. Only three of the eight associational ESPO members are involved in sector-related collective bargaining, as are both the state-owned non-associational entities Bulgarian Ports Infrastructure Company and the Cyprus Ports Authority (for the third non-associational member of ESPO, the Authority for Transport Malta, no information is available). However, one cannot rule out the possibility that one or another associational member of ESPO is – as a public sector unit – formally excluded from collective bargaining and yet, in practice, involved in sectoral employment regulation.

Both FEPORT as the European representative of the private port operators and, in particular, ESPO as the European voice of the public ports sector each appear – as individual units – to cover only a relatively small part of the port sector as demarcated for the purpose of this study, both in terms of employer organisations and countries covered. However, since their respective membership domains are complementary to each other rather than mutually overlapping, together (including the three non-associational ESPO members) they have 19 of the 28 Member States under their umbrella through members from these countries. Moreover, it can be assumed that in these 19 countries they tend to organise the most important national associations and – in the case of ESPO – also non-associational entities within their respective realms. In particular, FEPORT members can be regarded as the key actors of business in the sector's industrial relations systems, since all of them but LJKKA of Lithuania are involved in sector related collective bargaining – in most cases multi-employer bargaining.

Capacity to negotiate

The third criterion of representativeness at the European level refers to the organisations' capacity to negotiate on behalf of their own members.

On the side of organised labour, Article 13 of the ETF Constitution stipulates that

> *… the Executive Committee shall decide the guidelines governing the procedure for negotiations and agreements between social partners in the EU. These guidelines shall lay down, in particular, the mandate for negotiations; the composition of the negotiating team; and the procedure for adopting or rejecting the results of negotiations. The guidelines shall be subject to ratification by the affiliated organisations from EU countries represented at Congress.*

Hence, it appears that rather than being equipped with an explicit permanent mandate on behalf of its members, ETF has laid down clear procedures for how to operate in the case of imminent negotiations in the framework of the European sectoral social dialogue.

By contrast, the IDC's Constitution does not provide for any clear formal procedures for member participation to be observed in order to enter social dialogue or negotiations. Rather, Article 4f of the Constitution contains an abstract clause according to which 'the General Assembly consisting of the affiliated trade unions duly informed and with free participation, will be the supreme authority for all those decisions that affect general interests of all the members.'

On the employer side, the Statutes of ESPO do not explicitly grant this organisation a general or permanent mandate to negotiate on behalf of its members. However, Article 15 of the Statutes stipulate that the Secretary General, who is responsible for the daily management and the external representation of the organisation, ‘shall have the duty to carry out tasks within the limits or the mandate given to him by the General Assembly’, including, among other functions, ‘establishing and maintaining regular contacts with EU Institutions’ and ‘presenting views and opinions to EU Institutions and other relevant bodies.’ This implies that the General Assembly, which is composed of the member organisations, is authorised to give the Secretary General a mandate for negotiations with third parties as well.

Likewise, in the case of FEPORT, Article 23 of the Articles of Association stipulates that the Board of Directors, whose members are appointed by the General Assembly (which, in turn, consists of representatives of the voting member associations and member companies), is devised to manage the daily business of the association. Accordingly, it ‘shall have the power to act in all matters, including taking an official position in its dealings with third parties (…).’ However, the persons authorised to represent FEPORT ‘in dealings with third parties (…) jointly or individually’ are, according to Article 27 of the Articles of Association, the Chair (who is elected by the General Assembly) and the Secretary General (who is appointed by the General Assembly). Hence, as in the case of ESPO, FEPORT is equipped with an implicit rather than explicit mandate to negotiate on behalf of its members in matters related to the sectoral European social dialogue.

As a final proof of the weight of these three organisations, it is useful to look at other European organisations which may be important representatives of the sector. This can be done by reviewing the other European organisations to which the sector-related trade unions and employer associations are affiliated.

The affiliations of the trade unions are listed in Table 7. European organisations other than ETF and IDC represent a relatively high proportion of both sector-related trade unions and countries. For reasons of brevity, only those European organisations are mentioned here which cover at least three countries. This involves five organisations: IndustriAll, the European Federation of Public Service Unions (EPSU), UNI Europa, the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT) and the Sections of the European Transport Workers’ Federation (ETF) other than Dockers. None of these organisations record more than 12 affiliations. Although the affiliations listed in Table 7 are likely not to be exhaustive, this overview still underlines the principal status, in particular, of ETF (Dockers), and also of IDC as the sector’s labour representatives. This is because the presence of the organisations other than ETF (Dockers) and IDC responds to the overlapping domains of many sector-related trade unions (see Table 6). European organisations other than ETF and IDC do not claim to attract unions from the ports sector.

A similar review of the membership of the national employer/business associations can be derived from Table 9. Most of them have no or very few affiliations to European associations other than FEPORT and ESPO. Overall, only one alternative European association can be identified that covers at least three countries. This is the European Community Shipowners’ Association (ECSA) with five affiliations in five countries (Denmark, Finland, France, Italy and Luxembourg). In terms of both the number of affiliations as well as territorial coverage, however, this organisation lags far behind both FEPORT and ESPO.

Commentary

In its 2013 Communication on ports (COM[2013] 295 final), the European Commission identifies a number of structural shortcomings in the European ports sector, foremost of which are connectivity problems to the hinterland, the lack of transparency with regard to public funding, labour market entry barriers, inadequate governance models and excessive bureaucracy and administrative (customs) procedures. However, in spite of several attempts by the EU to open up access to the market of port services, the European ports industry has undergone only relatively minor economic restructuring thus far. In a few countries, such as Greece, Portugal and Romania, restructuring measures in the ports sector have been initiated within the framework of an encompassing restructuring programme affecting the entire national economy and industrial relations, as required by the EU authorities. Restructuring in the ports industry has in some cases meant liberalisation and privatisation processes (as in the case of Greece, Poland and Slovenia) and may also have triggered some changes in the national industrial relations systems. Endeavours to liberalise the market of port services and the port labour market have in some countries resulted in industrial dispute (for instance, in Portugal and Slovenia). However, overall, both governance practices and industrial relations systems in the ports industry have remained relatively resistant to reform in recent decades.

This may be traced back to two main features of the European ports industry. On the one hand, European ports are often owned and/or managed by public authorities and thus prove resistant to alteration. On the other hand, ports are traditionally a stronghold of trade unionism, particularly in state- or municipality-controlled ports. Strong unionisation in connection with large port operators, often in public ownership, has paved the way for single-employer arrangements in many countries. In some of them, for example in Croatia, Estonia, Hungary, Latvia, Lithuania, Malta, Slovenia and the UK, employers have refrained from setting up employer organisations equipped with a bargaining mandate. In another group of countries, however, multi-employer bargaining conducted by employer organisations is prevalent in the sector. Overall, according to the data available, as many countries operate under predominant multi-employer bargaining as countries with prevalent single-employer bargaining.

In terms of collective bargaining coverage, the situation in the European ports industry is highly polarised. While ten of the 17 countries with available data record high rates of collective bargaining coverage – reaching 85% to 100% – five countries record rates below 30% and two countries record medium-range rates of between 30% and 60%. High collective bargaining coverage can be found exclusively among the ‘old’ Member States, whereas low rates scatter among the Baltic and the central and eastern European countries. Comparing the figures on cross-sectoral collective bargaining coverage in the EU28, as presented in the EurWORK country profiles, the ports sector’s bargaining coverage of each Member State indicates that the ports sector’s bargaining coverage is more or less higher in 11 of the 16 countries for which comparable data are available. Only in Estonia, Hungary, Slovakia and Slovenia is the sector’s bargaining coverage lower than that of cross-sectoral bargaining, whereas the two measures are equal in Croatia. Comparatively high levels of collective bargaining coverage in the sector may be explained by high organisational strength, particularly on the side of organised labour and relatively stable national industrial relations systems. Overall, collective bargaining coverage rates in the ports sector tend to increase with the predominance of multi-employer arrangements and a significant use of extension practices.

It is important to note that the data provided in the country profiles have not undergone a thorough validation procedure. However, since more reliable information on national cross-sectoral collective bargaining coverage rates tends to be outdated, this report refers to information provided by Eurofound’s network of European correspondents.

With regard to the representativeness status of the sectoral European-level social partner organisations examined in this study, on the employee side ETF (with its Dockers’ Section), which tends to organise the major players among a highly fragmented associational ‘landscape’ on the side of organised labour within the sector, can be regarded as the main EU-wide representative of the sector’s workforce. By contrast, IDC tends to cover the smaller trade unions that represent particular niches in the sector. Yet it seems that not only ETF, but also IDC, may rightfully claim some representativeness within the sector for itself, while no other European organisation with a special focus on port workers’ representation exists.

On the employer side, FEPORT representing the private port operators and ESPO as the voice of the port authorities and administrations individually are not representative of the ports sector as a whole; however, since their respective membership domains are complementary to each other rather than mutually overlapping, together they represent major industrial relations actors in the sector in most Member States. FEPORT and ESPO are unmatched as the European voices of the ports sector's employers, as there is no other European organisation which can compare with them in terms of organising relevant sector-related businesses and employer organisations across the European Member States.

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Annex 1: Data tables

Note about the data

Due to the particular and encompassing definition of the sector under scrutiny, including rather heterogeneous activities, many of the correspondents had great difficulties in gathering data that matched the sector. For this reason, Table 3 and Table 4 contain many blanks, and some of the data provided may be questionable. To complement these sketchy tables, an additional Table 5 containing data calculated and compiled on the basis of Eurostat SBS statistics (providing data at four-digit NACE code level) is included in this report. However, the data included in Table 5, devised to contrast the data included in Table 3 and Table 4 for verification and to provide figures where corresponding numbers are lacking in Table 3 and Table 4, only partially accomplish this purpose. This is because for most countries Eurostat SBS statistics are available only for part of the sector, which means that a direct comparison of the corresponding data of the respective tables is often not possible.

Table 3: Total companies and employment in ports: approximations (2003 and 2013)

Country	Year	Number of Companies	Year	Total Employment	Women	Men	Total sectoral employment as % of total employment in economy
AT	2005	1159	2005	45146	n.a.	n.a.	1.2%
AT	2012	1292	2012	42829	10014	32815	1.0
BE	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
BE	2013	n.a.	2013	n.a.	n.a.	n.a.	n.a.
BG	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
BG	2013	n.a.	2013	n.a.	n.a.	n.a.	n.a.
CY	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
CY	2012	1592	2012	16438	n.a.	n.a.	4.2%
CZ	2003	4196**	2003	258300	51300	207000	5,5
CZ	2013	7826**	2013	31900	9000	22800	0.6
DE	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
DE	2011	27861	2013	n.a.	n.a.	n.a.	n.a.
DK	2003	1570	2003	29011	6823	22188	1.1%
DK	2012	1548	2013	27921	6798	21123	1.0%
EE	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
EE	2013	n.a.	2013	n.a.	n.a.	n.a.	n.a.
ES	2003	20818*	2003	n.a.	n.a.	n.a.	n.a.

ES	2013	20112*	2013	n.a.	n.a.	n.a.	n.a.
FI	2003	1412	2003	n.a.	n.a.	n.a.	n.a.
FI	2012	1992	2013	33772	n.a.	n.a.	n.a.
FR	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
FR	2011	3335	2013	n.a.	n.a.	n.a.	n.a.
EL	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
EL*	2013	5691	2013	58990	14156	44834	1.7%
HR	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
HR*	2013	1378	2013	60981****	8151****	52830****	4.5%****
HU	2003	n.a.	2003	9325	n.a.	n.a.	0.4%
HU	2013	n.a.	2013	47882	n.a.	n.a.	2.2%
IE	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
IE	2013	n.a.	2013	n.a.	n.a.	n.a.	n.a.
IT	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
IT	2011	23425	2011	334130	79857**	254273**	2.2%
LT	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
LT	2012	3164	2013	n.a.	n.a.	n.a.	n.a.
LU	2005	317	2003	n.a.	n.a.	n.a.	n.a.
LU	2013	222	2013	n.a.	n.a.	n.a.	n.a.
LV	2003	494	2003	19419	5921	13498	2.3%
LV	2012	1621	2012	26639	8696	17943	3.1%
MT	2005	346	2005	3372	n.a.	n.a.	2.4%
MT	2013	405	2013	3994	n.a.	n.a.	2.7%
NL	2003	8855	2003	n.a.	n.a.	n.a.	n.a.
NL	2013	15075	2013	n.a.	n.a.	n.a.	n.a.
PL	2003	n.a.	2003	n.a.	n.a.	n.a.	n.a.
PL	2013	n.a.	2013	n.a.	n.a.	n.a.	n.a.
PT	2004	2257	2001	15791	3692	12099	0.3%
PT	2012	2482	2011	22630	6266	16364	0.5%
RO	2003	1498*	2003	n.a.	n.a.	n.a.	n.a.
RO	2012	2399*	2013	n.a.	n.a.	n.a.	n.a.
SE	2003	1530	2003	n.a.	n.a.	n.a.	n.a.
SE	2013	1960	2013	n.a.	n.a.	n.a.	n.a.
SI	2003	456	2003	11449	2967	8482	1.5%
SI	2013	840	2013	9160	2887	6273	1.2%

SK	2003	1861	2003	5900	1500	4400	0.3%
SK	2013	4268	2013	16600	4200	12400	0.7%
UK	2003	5705***	2003	296831***	61557	235274	1.1%
UK	2013	18090***	2013	325041***	62655	262386	1.1%

** = figures include all support activities for transportation according to NACE 52.2*

*** = estimate*

**** = figures are not directly comparable*

***** = figure questionable*

Source: Eurofound's network of European correspondents (2014–2015), national statistics. For detailed description of sources please refer to the national reports.

Table 4: Total employees in ports: approximations (2003 and 2013)

Country	Year	Total Employees	Female Employees	Male Employees	Total sectoral employees as % of total employees in economy
AT	2005	44592	n.a.	n.a.	1.4%
AT	2012	41924	9883	32041	1.2%
BE	2003	n.a.	n.a.	n.a.	n.a.
BE	2013	n.a.	n.a.	n.a.	n.a.
BG	2003	n.a.	n.a.	n.a.	n.a.
BG	2013	n.a.	n.a.	n.a.	n.a.
CY	2003	n.a.	n.a.	n.a.	n.a.
CY	2013	n.a.	n.a.	n.a.	n.a.
CZ	2003	217900	47400	170400	5,6
CZ	2013	30700	9000	21700	0.8
DE	2003	n.a.	n.a.	n.a.	n.a.
DE	2013	628901	~141673	~487408	1.8%
DK	2003	28559	6769	21790	1.1%
DK	2013	27592	6768	20824	1.1%
EE	2003	n.a.	n.a.	n.a.	n.a.
EE	2013	n.a.	n.a.	n.a.	n.a.
ES	2003	n.a.	n.a.	n.a.	n.a.
ES	2013	n.a.	n.a.	n.a.	n.a.
FI	2003	24759	n.a.	n.a.	1.9%
FI	2012	32973	n.a.	n.a.	2.2%
FR	2003	n.a.	n.a.	n.a.	n.a.

FR	2013	86147	n.a.	n.a.	n.a.
EL	2003	n.a.	n.a.	n.a.	n.a.
EL*	2013	53299	13451	39848	2.6%
HR	2003	n.a.	n.a.	n.a.	n.a.
HR*	2013	60581	14958	45623	4.4%
HU	2003	8417	n.a.	n.a.	0.5%
HU	2013	44102	n.a.	n.a.	3.1%
IE	2003	n.a.	n.a.	n.a.	n.a.
IE	2013	n.a.	n.a.	n.a.	n.a.
IT	2003	n.a.	n.a.	n.a.	n.a.
IT	2011	305251	73260**	231991**	3.0%
LT	2003	n.a.	n.a.	n.a.	n.a.
LT	2012	33273	n.a.	n.a.	2.9%
LU	2005	586	68	518	0.2%
LU	2013	893	130	763	0.2%
LV	2003	19412	5919	13493	2.3%
LV	2012	26385	8613	17772	3.2%
MT	2005	3137	n.a.	n.a.	3.1%
MT	2013	3837	n.a.	n.a.	3.3%
NL	2003	n.a.	n.a.	n.a.	n.a.
NL	2013	n.a.	n.a.	n.a.	n.a.
PL	2003	n.a.	n.a.	n.a.	n.a.
PL	2013	n.a.	n.a.	n.a.	n.a.
PT	2001	15001	3508	11493	0.4%
PT	2011	21215	6051	15164	0.6%
RO	2003	n.a.	n.a.	n.a.	n.a.
RO	2013	n.a.	n.a.	n.a.	n.a.
SE	2003	36316	n.a.	n.a.	1.0%
SE	2013	41472	n.a.	n.a.	1.0%
SI	2003	11329	2952	8377	1.6%
SI	2013	8743	2845	5898	1.3%
SK	2003	5100	1300	3800	0.3%
SK	2013	16400	4200	12200	0.8%
UK	2003	289651	61032	228619	1.2%
UK	2013	316263	61544	254719	1.2%

** = figures include all support activities for transportation according to NACE 52.2*

*** = estimate*

**** = figures are not directly comparable*

***** = figure questionable*

Source: Eurofound's network of European correspondents (2014–2015), national statistics. For detailed description of sources please refer to the national reports.

Table 5: Companies, employment and employees in ports (2008 and 2012)

Country	Year	Companies	Employment	Employees
AT	2008	1277	45458	44756
AT	2012	1292	42829	41924
BE	2008	2792[a]	45297[a]	42810[a]
BE	2012	3153[b]	86123[b]	83241[b]
BG	2008	1645	30824[d]	29620[d]
BG	2012	1933[c]	27286[a]	26079[a]
CY	2008	747	8464[i]	8071[i]
CY	2012	709[d]	6469[d]	6276[d]
CZ	2008	n.a.	n.a.	n.a.
CZ	2012	n.a.	n.a.	n.a.
DE	2008	17145	546127	529922
DE	2012	17503	576437	560488
DK	2008	1748	21894[a]	21649[a]
DK	2012	1688	44695[c]	43132[c]
EE	2008	948	11456[j]	11209[j]
EE	2012	1212	11823[i]	11411[i]
ES	2008	14354[e]	226665[e]	218391[e]
ES	2012	17010[f]	221612[f]	209619[f]
FI	2008	1975	32341[c]	31924[c]
FI	2012	2090	n.a.	n.a.
FR	2008	9282	n.a.	247713
FR	2012	10618	252165	249860
EL	2008	11076[c]	57133[c]	45490[c]
EL	2012	9490[c]	48724[c]	41722[c]
HR	2008	1581	22199[k]	21721[k]
HR	2012	1607	25042[c]	24126[c]
HU	2008	3550[d]	54022[d]	52573[d]
HU	2012	3568[c]	50654[c]	49048[c]

IE	2008	1018[g]	18199[g]	17083[g]
IE	2012	1120[g]	15283[g]	14649[g]
IT	2008	21824	361489	332372
IT	2012	23251	335604	316747
LT	2008	1130	15143[b]	14981[b]
LT	2012	1633	17941[b]	17792[b]
LU	2008	162[d]	n.a.	n.a.
LU	2012	187[d]	n.a.	n.a.
LV	2008	1460	25254	25208
LV	2012	1859	24801	24412
MT	2008	374	n.a.	2920[m]
MT	2012	n.a.	n.a.	n.a.
NL	2008	4968	82066[b]	76019[b]
NL	2012	6088	90115	81178
PL	2008	8657	73495	63332
PL	2012	10375	123509	111508
PT	2008	2337	27369	26468
PT	2012	2425	23022	22172
RO	2008	2092[h]	68144[h]	67742[h]
RO	2012	2341	62261	61804
SE	2008	3868	59671	52600
SE	2012	4266[c]	55706[c]	48539[c]
SI	2008	795	7603[l]	7185[l]
SI	2012	1080	7829[c]	7210[c]
SK	2008	665[c]	30628[c]	30354[c]
SK	2012	3332[a]	31597[a]	28946[a]
UK	2008	10753	275985	271990
UK	2012	10065	293345[d]	290828[d]

[a] = without NACE 49.50, 50.10 and 50.20; [b] = without NACE 50.10; [c] = without NACE 49.50; [d] = without NACE 50.10 and 50.20; [e] = including NACE 52.23; [f] = without NACE 49.50, including NACE 52.23; [g] = without NACE 50.10 and 50.20, including NACE 52.23; [h] = prognosis data; [i] = without NACE 50.20; [j] = without NACE 50.20, including NACE 52.23; [k] = without NACE 49.50 and 50.10; [l] = without NACE 49.50 and 50.20; [m] = without NACE 50.10, including NACE 52.23.;

Source: Eurostat, SBS (access on webpage as of 28 July 2015), and own calculations.

Table 6: Domain coverage, membership and density of trade unions in ports (2012/13/14)

	Trade union	Type of membership	Domain coverage[a]	Membership		Density	
				Members active	Members sector active	Sector density (%)	Sectoral domain density in relation to overall domain density
AT	PRO-GE	voluntary	SO	230486**	120	0.3%	n.a.
AT	vida*	voluntary	SO	139919**	n.a.	n.a.	n.a.
AT	GPA-djp*	voluntary	SO	175455**	n.a.	n.a.	n.a.
BE	ACV-CSC Transcom*	mixed***	SO	80000	5022	n.a.	>
BE	LBC-NVK*	voluntary	SO	275000	8000	n.a.	>
BE	ACLVB-CGSLB*	n.a.	O	n.a.	n.a.	n.a.	n.a.
BE	BBTK-SETCa	voluntary	SO	42000	5000	n.a.	n.a.
BE	ABVV/BTB - FGTB/UBT*	n.a.	SO	n.a.	n.a.	n.a.	n.a.
BG	FTW*	voluntary	SO	7000	1000	n.a.	>
BG	FTTUB*	voluntary	SO	10000	1150	n.a.	>
BG	SSB*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
CY	OMEPEGE-SEK*	voluntary	SO	5000-6000	n.a.	n.a.	n.a.
CY	SEGDAMELIN-PEO*	voluntary	SO	7700	103	n.a.	<
DE	ver.di	voluntary	SO	2064541	n.a.	n.a.	n.a.
DK	3F*	voluntary	SO	264571	3000	10.9%	>
DK	SL	voluntary	S	2986	2986	10.8%	n/a
DK	MMF	voluntary	SO	11000	2200	8.0%	equal
DK	Co-Sea*	voluntary	S	>1922	>1922	7.0%	n/a
EE	EMSA*	voluntary	SO	2056	132	n.a.	n.a.
EE	EVAF*	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	FSC-CCOO*	voluntary	O	250000	5000	n.a.	n.a.
ES	SMC-UGT*	voluntary	O	180000	6000	n.a.	n.a.

ES	CETM*	voluntary	S	5000	5000	n.a.	n/a
ES	FGAMT-CIG*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
ES	ELA-Zerbitzuak*	voluntary	SO	26142	n.a.	n.a.	n.a.
ES	LAB-Sindikatua*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
FI	AKT	voluntary	SO	37000	4500	13.9%	>
FI	FMPA	voluntary	S	160	160	0.5%	n/a
FI	PARDIA	voluntary	SO	60000**	2860	8.7%	equal
FI	SMU	voluntary	S	8500	8500	25.8%	n/a
FI	ERTO	voluntary	SO	17000	8000	24.3%	>
FI	PRO	voluntary	SO	110000	n.a.	n.a.	n.a.
FI	JHL	voluntary	SO	230000	1000	3.0%	>
FI	FEA	voluntary	SO	2400	1100	3.3%	n.a.
FI	FSU	voluntary	S	1600	1600	4.9%	n/a
FR	FPD-CGT*	voluntary	SO	16000	8000	9.3%	>
FR	FGTE-CFDT*	voluntary	O	50000	1300	1.5%	<
FR	FEETS FO*	voluntary	SO	n.a.	n.a.	n.a.	<
FR	FO TL*	voluntary	SO	n.a.	n.a.	n.a.	<
FR	FGT-CFTC*	voluntary	O	n.a.	n.a.	n.a.	<
FR	FNSM-CGT*	voluntary	S	n.a.	n.a.	n.a.	n/a
FR	FOMM-CGT*	voluntary	S	n.a.	n.a.	n.a.	n/a
FR	CGT Transports*	voluntary	SO	34500	n.a.	n.a.	n.a.
FR	FT-CFE-CGC*	voluntary	SO	3000	n.a.	n.a.	<
FR	FNCAMPD-CGC*	voluntary	S	n.a.	n.a.	n.a.	n/a
EL	OMYLE	voluntary	S	1386	1386	2.6%	n/a
EL	DUPPA	voluntary	S	280	280	0.5%	n/a
EL	OFE	voluntary	S	2500	2500	4.7%	n/a
EL	PNO	voluntary	S	17000	17000	31.9%	n/a
EL	PASENT	voluntary	SO	8500	6500	12.2%	>
HR	SSLRLP	voluntary	S	450	450	0.7%	n/a
HR	SLRH	voluntary	S	1800	1800	3.0%	n/a
HR	SSLRLD	voluntary	S	40	40	0.1%	n/a
HR	NSZRL	voluntary	S	250	250	0.4%	n/a
HR	SSZRL	voluntary	S	330	330	0.5%	n/a

HR	LSS	voluntary	S	65	65	0.1%	n/a
HR	NSPLS	voluntary	S	90	90	0.1%	n/a
HR	SSZLV	voluntary	S	15	15	0.0%	n/a
HR	SPH	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU	GOES	voluntary	S	n.a.	n.a.	n.a.	n/a
IE	SIPTU	voluntary	SO	199881 (2011)	n.a.	n.a.	n.a.
IE	UNITE	voluntary	SO	31594 (2011)	n.a.	n.a.	n.a.
IE	TEEU	voluntary	SO	39000 (2011)	n.a.	n.a.	n.a.
IE	SUI	voluntary	S	n.a.	n.a.	n.a.	n/a
IE	UCATT	voluntary	SO	39000 (2011)	n.a.	n.a.	n.a.
IE	IMPACT	voluntary	SO	61500	n.a.	n.a.	n.a.
IT	FILT-CGIL*	voluntary	SO	50000	6000	2.0%	<
IT	FIT-CISL*	voluntary	O	121577	n.a.	n.a.	n.a.
IT	UILTrasporti*	voluntary	SO	117846	n.a.	n.a.	n.a.
IT	FILCTEM-CGIL*	voluntary	SO	224447	n.a.	n.a.	n.a.
IT	Femca-CISL*	voluntary	SO	120000	200	0.1%	equal
IT	Uiltec*	voluntary	SO	n.a.	9000	2.9%	<
IT	UGL Chimici*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
LT	LGPF*	voluntary	SO	4350	n.a.	n.a.	equal
LT	LJS*	voluntary	O	1650	n.a.	n.a.	>
LT	LVTDPF*	voluntary	S	240	240	0.7%	n/a
LT	DPS / IDU	voluntary	S	n.a.	n.a.	n.a.	n/a
LT	LKADPSF*	voluntary	SO	1200	n.a.	n.a.	n.a.
LT	LADPS*	voluntary	SO	1490	n.a.	n.a.	n.a.
LV	LTFJA*	voluntary	S	7433	7433	28.2%	n/a
LV	ÜTAF*	voluntary	SO	1152	n.a.	n.a.	n/a
LU	LCGB-Transport*	voluntary	O	700	n.a.	n.a.	n.a.
LU	OGBL-Transport*	voluntary	SO	4025	300	33.6%	<
MT	MDU*	voluntary	S	600	600	15.6%	n/a
MT	GWU*	voluntary	SO	39201	n.a.	n.a.	<
MT	UHM*	voluntary	n.a.	22502	n.a.	n.a.	<

NL	FNV Bondgenoten*	voluntary	O	475000	6915	n.a.	>
NL	CNV Vakmensen*	voluntary	O	140000	1500	n.a.	>
PL	FZZMiR*	voluntary	SO	2188	1643	n.a.	<
PL	OZZOiM*	voluntary	SO	5078	4699	n.a.	>
PL	KSPM NSZZ Solidarnosc*	voluntary	S	1944	1944	n.a.	n/a
PL	WZZPGM*	voluntary	SO	5000	1100	n.a.	<
PL	KSMMiR*	voluntary	SO	6106	n.a.	n.a.	n.a.
PL	NSZZ Solidarnosc-80*	voluntary	O	n.a.	n.a.	n.a.	n.a.
PT	SITESE*	voluntary	O	<10000	n.a.	n.a.	n.a.
PT	FESMAR*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
PT	SIMAMEVIP*	voluntary	O	n.a.	n.a.	n.a.	n.a.
PT	SINDEPESCAS*	voluntary	n.a.	n.a.	n.a.	n.a.	n.a.
PT	SOEMM*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
PT	OFICIAISMAR*	voluntary	SO	n.a.	n.a.	n.a.	n.a.
PT	SETC*	voluntary	S	366	366	1.7%	n/a
PT	STPA*	voluntary	S	n.a.	n.a.	n.a.	n/a
PT	FNSTP*	voluntary	S	n.a.	n.a.	n.a.	n/a
RO	FNSP	voluntary	SO	4500	3500	n.a.	<
RO	FARUL	voluntary	S	400	400	n.a.	n/a
SE	Transport*	voluntary	SO	62000	9000	21.7%	>
SE	SHF*	voluntary	S	1400	1400	3.4%	n/a
SE	Pappers	voluntary	SO	15000	300	0.7%	equal
SE	SEKO*	voluntary	SO	122955	13300	32.1%	equal
SE	SBF	voluntary	S	3600	3600	8.7%	n/a
SE	SI	voluntary	SO	100000	240	0.6%	n.a.
SE	Unionen	voluntary	SO	465000	9800	23.6%	equal
SE	Ledarna	voluntary	SO	91416	1900	4.6%	n.a.
SE	Lotsförbundet	voluntary	S	205	205	0.5%	n/a
SE	ST*	voluntary	SO	63700	n.a.	n.a.	<
SI	SPS	voluntary	S	250	250	n.a.	n/a
SI	SPDS*	voluntary	SO	180	130	n.a.	>

SI	SZPD*	voluntary	S	400	400	n.a.	n/a
SK	POZ	voluntary	SO	1920	1862	11.4%	>
SK	ECHOZ	voluntary	SO	11520	218	1.3%	<
UK	Unite*	voluntary	O	1400000	11491	3.6%	n.a.
UK	RMT*	voluntary	O	80000	n.a.	n.a.	n.a.
UK	TSSA*	voluntary	SO	30000	n.a.	n.a.	n.a.

*[a] = domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism (For details, see Table 2); * = Domain overlap with other sector-related trade unions; ** = figure includes non-active members; *** = union generally relies on voluntary membership; however, for some grades and functions in the ports sector membership is obligatory due to closed shop provisions;*

n.a. = not available; n/a = not applicable.

Source: Eurofound's network of European correspondents (2014–2015), administrative data and estimates

Table 7: Collective bargaining, consultation and affiliations of trade unions in ports (2012/13/14)

Country	Trade union	Collective bargaining (CB)[a]	CB coverage (total)[b]	Consultation/ frequency	National and European affiliations[**]
AT	PRO-GE	M	n.a.	regularly	*ÖGB*; IndustriAll, EFFAT
AT	vida*	S+M	7000	regularly	*ÖGB*; ETF, EFFAT, EPSU, UNI-Europa
AT	GPA-djp*	S+M	20000	n.a.	*ÖGB*; IndustriAll, EFFAT, EPSU, EFJ, UNI-Europa
BE	ACV-CSC Transcom*	S+M	11190	regularly	*ACV-CSC*; ETF (ports)
BE	LBC-NVK*	S+M	n.a.	ad-hoc	*ACV-CSC*; ETF (ports), IndustriAll, UNI-Europa, EFFAT, EPSU, EuroCadres
BE	ACLVB-CGSLB*	S+M	n.a.	n.a.	ETF (ports)
BE	BBTK-SETCa	S+M	20000	ad-hoc	*FGTB*; ETF (ports), UNI-Europa, EPSU, EFFAT, IndustriAll
BE	ABVV/BTB - FGTB/UBT*	S+M	n.a.	regularly	*FGTB*; ETF (ports)

BG	FTW*	S+M	1000	regularly	*PODKREPA*; ETF (ports)
BG	FTTUB*	S+M	n.a.	regularly	*CITUB*; ETF (ports)
BG	SSB*	S	n.a.	regularly	*CITUB*; ETF (ports)
CY	OMEPEGE-SEK*	S+M	n.a.	n.a.	*SEK*; ETF (ports), EFFAT
CY	SEGDAMELIN-PEO*	S+M	226	ad-hoc	*PEO*; IDC
DE	ver.di	S+M	n.a.	regularly	*DGB*; ETF (ports)
DK	3F*	S+M	3390	regularly	*LO*; ETF (ports), UNI-Europa, EPSU, EFFAT, EFBWW, IndustriAll
DK	SL	M	1789	regularly	ETF (ports), EMPA
DK	MMF	M	2000	regularly	
DK	Co-Sea*	S+M	>2560	regularly	*LO*; ETF
EE	EMSA*	S	2438	ad-hoc	*EAKL*; ETF (ports)
EE	EVAF*	S	730	n.a.	ETF (ports)
ES	FSC-CCOO*	S+M	>100000	regularly	*CCOO*; ETF (ports)
ES	SMC-UGT*	S+M	20000	regularly	*UGT*; ETF (ports)
ES	CETM*	S+M	6000	regularly	IDC
ES	FGAMT-CIG*	S+M	n.a.	n.a.	*CIG*; ETF (ports)
ES	ELA-Zerbitzuak*	S+M	n.a.	n.a.	ETF (ports)
ES	LAB-Sindikatua*	S+M	n.a.	n.a.	IDC
FI	AKT	S+M	4870	regular	*SAK*; ETF (ports)
FI	FMPA	S	167	ad-hoc	*(STTK)*; EMPA
FI	PARDIA	M	2860	no	*STTK*; EPSU
FI	SMU	S+M	9525	regular	*SAK*; ETF
FI	ERTO	M	8000	regular	*STTK*; ETF
FI	PRO	S+M	n.a.	n.a.	*STTK*; ETF (ports)
FI	JHL	S+M	1000	regular	*SAK*; ETF (ports)
FI	FEA	S+M	1000	regular	*STTK*; ETF
FI	FSU	S+M	1600	regular	*STTK*; ETF (ports)
FR	FPD-CGT*	S+M	10000	regular	*CGT*; IDC
FR	FGTE-CFDT*	S+M	26000	ad-hoc	*CFDT*; ETF (ports)
FR	FEETS FO*	S+M	26000	ad-hoc	*CGT-FO*; ETF (ports)
FR	FO TL*	S+M	n.a.	ad-hoc	*CGT-FO*; ETF

FR	FGT-CFTC*	S+M	26000	ad-hoc	*CFTC*; ETF
FR	FNSM-CGT*	S+M	16000	ad-hoc	*CGT*; ETF
FR	FOMM-CGT*	S+M	n.a.	ad-hoc	*CGT*; ETF
FR	CGT Transports*	S+M	n.a.	ad-hoc	*CGT*; ETF
FR	FT-CFE-CGC*	S+M	16000	ad-hoc	*CFE-CGC*; FICT
FR	FNCAMPD-CGC*	S+M	10000	n.a.	*CGC*
EL	OMYLE	S+M	1200	no	*GSEE*; IDC
EL	DUPPA	S	280	no	IDC
EL	OFE	S	2500	regular	*GSEE*; ETF (ports)
EL	PNO	M	n.a.	no	*GSEE*; ETF
EL	PASENT	M	10800	ad-hoc	*OIYE*
HR	SSLRLP	S	700	ad-hoc	*URSH*
HR	SLRH	S	2200	ad-hoc	*SSSH*; ETF (ports)
HR	SSLRLD	S	40	ad-hoc	*URSH*
HR	NSZRL	S	280	ad-hoc	(*SSSH*; ETF [ports])
HR	SSZRL	S	350	ad-hoc	(*SSSH*; ETF [ports])
HR	LSS	S	80	ad-hoc	(*SSSH*; ETF [ports])
HR	NSPLS	S	120	ad-hoc	*HURS*
HR	SSZLV	S	20	ad-hoc	(*SSSH*; ETF [ports])
HR	SPH	n.a.	n.a.	n.a.	ETF (ports)
HU	GOES	S	799	no	
IE	SIPTU	S	n.a.	ad-hoc	*ICTU*; ETF (ports)
IE	UNITE	S	n.a.	no	*ICTU*
IE	TEEU	S	n.a.	no	*ICTU*
IE	SUI	S	n.a.	no	ETF
IE	UCATT	S	n.a.	no	*ICTU*
IE	IMPACT	S	n.a.	yes	*ICTU*; ETF (ports)
IT	FILT-CGIL*	S+M	n.a.	regular	*CGIL*; ETF (ports)
IT	FIT-CISL*	S+M	n.a.	regular	*CISL*; ETF (ports)
IT	UILTrasporti*	S+M	n.a.	ad-hoc	*UIL*; ETF (ports)
IT	FILCTEM-CGIL*	S+M	n.a.	regular	*CGIL*; EPSU, IndustriAll
IT	Femca-CISL*	S+M	1500	regular	*CISL*; IndustriAll
IT	Uiltec*	S+M	n.a.	regular	*UIL*; IndustriAll
IT	UGL Chimici*	S+M	n.a.	n.a.	*UGL*
LT	LGPF*	S	n.a.	ad-hoc	*LPSK*; ETF

LT	LJS*	S	n.a.	ad-hoc	ETF
LT	LVTDPF*	S	n.a.	ad-hoc	*LPSK*
LT	DPS / IDU	S	n.a.	n.a.	ETF (ports)
LT	LKADPSF*	S	n.a.	ad-hoc	*LPSK*; ETF
LT	LADPS*	S	n.a.	ad-hoc	*LPS Solidarumas*; ETF
LV	LTFJA*	S	4853	regular	*LBAS*; ETF
LV	ÜTAF*	S	2185	regular	*LBAS*; ETF (ports)
LU	LCGB-Transport*	S+M	1500	ad-hoc	*LCGB*
LU	OGBL-Transport*	S+M	1500	ad-hoc	*OGBL*; ETF
MT	MDU*	S	600	ad-hoc	IDC
MT	GWU*	S	n.a.	ad-hoc	ETF (ports)
MT	UHM*	S	n.a.	ad-hoc	*CMTU*
NL	FNV Bondgenoten*	S+M	7500	ad-hoc	*FNV*; ETF (ports)
NL	CNV Vakmensen*	S+M	7500	ad-hoc	*CNV*; ETF (ports)
PL	FZZMiR*	S	n.a.	ad-hoc	*OPZZ*; ETF (ports)
PL	OZZOiM*	S	n.a.	ad-hoc	*FZZ*; ETF
PL	KSPM NSZZ Solidarnosc*	S	1450	ad-hoc	*NSZZ Solidarnosc*; ETF (ports)
PL	WZZPGM*	S	800	ad-hoc	*OPZZ*
PL	KSMMiR*	S	n.a.	ad-hoc	*NSZZ Solidarnosc*; ETF
PL	NSZZ Solidarnosc-80*	S	n.a.	n.a.	*FZZ*
PT	SITESE*	S+M	492	n.a.	*UGT*; UNI-Europa
PT	FESMAR*	S	955	n.a.	*UGT*; ETF (ports)
PT	SIMAMEVIP*	S+M	4914	n.a.	*CGTP-IN*
PT	SINDEPESCAS*	S+M	5276	n.a.	*UGT*
PT	SOEMM*	no	0	n.a.	*UGT*; ETF (ports)
PT	OFICIAISMAR*	no	0	n.a.	*CGTP-IN*; ETF (ports)
PT	SETC*	M	n.a.	no	IDC
PT	STPA*	no	0	n.a.	IDC
PT	FNSTP*	no	0	n.a.	*UGT*; IDC
RO	FNSP	M	4000	regular	*BNS*; ETF (ports)
RO	FARUL	S	400	ad-hoc	ETF (ports)

SE	Transport*	M	11300	ad-hoc	*LO*; ETF (ports), UNI-Europa, EPSU
SE	SHF*	S	600	regularly	IDC
SE	Pappers	M	300	ad-hoc	*LO*; IndustriAll
SE	SEKO*	M	16700	regularly	*LO*; ETF, UNI-Europa, EFBWW, EPSU
SE	SBF	M	3200	regularly	ETF
SE	SI	M	240	no	*SACO*; IndustriAll, UNI-Europa, FEANI
SE	Unionen	M	15000	ad-hoc	*TCO*; UNI-Europa, ETF, Eurocadres
SE	Ledarna	M	1900	n.a.	ETF, CEC
SE	Lotsförbundet	M	215	regularly	*SACO*; EMPA
SE	ST*	M	n.a.	regularly	*TCO*; ETF, UNI-Europa, EPSU
SI	SPS	S	250	ad-hoc	*KS-90*; ETF (ports)
SI	SPDS*	S	999	no	*KS-90*
SI	SZPD*	S	999	no	*Alterativa*; ETF (ports)
SK	POZ	S	2270	ad-hoc[c]	*KOZ SR*; EPSU
SK	ECHOZ	S+M	310	regularly	*KOZ SR*; IndustriAll
UK	Unite*	S	n.a.	ad-hoc	*TUC*; ETF (ports), IndustriAll, (IDC)
UK	RMT*	n.a.	n.a.	n.a.	ETF (ports)
UK	TSSA*	n.a.	n.a.	n.a.	ETF (ports)

** = Domain overlap with other sector-related trade unions; ** = National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level sectoral associations only; affiliation put in parenthesis means indirect affiliation via higher- or lower-order unit; [a] = Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining; [b] = number of employees covered by collective agreements concluded by the union within the ports sector; [c] = indirect consultation via higher-order unit; n.a. = not available.*

Source: Eurofound's network of European correspondents (2014–2015), administrative data and estimates

Table 8: Domain coverage and membership of employer/business organisations in ports (2012/13/14)

	Employer Organisation	Domain coverage [a]	Membership				
			Type [b]	Companies	– in sector	Employees	– in sector
AT	FVSch	S	o	100	100	45500	n.a.
AT	FVMI	SO	o	26	n.a.	4200	n.a.
AT	FVSp	SO	o	1683	n.a.	22659	n.a.
AT	FV ALS-Schifffahrt	SO	o	406	n.a.	600	n.a.
BE	WBH	S	o	180	180	11000	11000
BE	WF-FE	SO	v	n.a.	n.a.	n.a.	n.a.
CY	CSA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CY	LLPA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DE	ZDS	S	v	190	190	12600	12600
DK	DI	SO	v	10000	95	1000000	n.a.
DK	DSA	SO	v	93	93	23048	17113
ES	ANESCO	S	v	148	148	n.a.	n.a.
FI	SHL	S	v	67	67	4800	4800
FI	FSA	S	v	25	25	12000	12000
FI	FPOA	S	v	50	50	3000-4000	3000-4000
FI	AVAINTA	SO	v	600	5	33000	248
FR	UPF*	S	v	44	44	6000	6000
FR	TLF*	SO	v	n.a.	300	220000	n.a.
FR	UNIM*	S	v	100	100	5500	5500
FR	FSA*	SO	v	49	n.a.	22000	n.a.
EL	ELIME	S	v	13	13	1880	1880
EL	SEEN	S	v	22	22	5000	5000
EL	UGS	S	v	n.a.	n.a.	n.a.	n.a.
HR	ZLU	S	v	6	6	2000	2000
IE	IBEC	O	v	7500	n.a.	n.a.	n.a.
IT	Assiterminal*	S	v	64	64	6020	6020
IT	Assologistica*	SO	v	230	35	25000	2000
IT	Assoporti*	S	v	23	23	1200	1200

IT	Fise-Uniport*	S	v	25	25	3000	3000
IT	Confitarma*	S	v	230	230	24000	24000
IT	Fedarlinea*	S	v	7	n.a.	7	n.a.
IT	Assorimorchi atori*	S	v	22	22	1000	1000
IT	Federimorchi atori*	S	v	6	6	n	n.a.
IT	CE	SO	v	n.a.	n.a.	n.a.	n.a.
LT	LJKKA	SO	v	17	15	n.a.	n.a.
LU	GT*	SO	v	260	n.a.	5000	n.a.
LU	FEDIL Shipping*	S	v	5	5	1500	1500
NL	Verocog-AWVN	S	v	5	5	400	400
PT	AATFL	SO	v	8	8	600	600
PT	AANP	C	v	n.a.	n.a.	n.a.	n.a.
PT	ACOPE	SO	v	n.a.	n.a.	n.a.	n.a.
PT	ANESUL	C	v	n.a.	n.a.	n.a.	n.a.
PT	AOPL	S	v	4	4	n.a.	n.a.
PT	AOPPDL	S	v	2	2	330	330
PT	APP	S	v	11	11	n.a.	n.a.
RO	OP	S	v	35	35	7000	7000
SE	SARF	S	v	93	93	10300	10300
SE	Sveriges Hamnar*	S	v	64	64	4100	4100
SE	SAIE*	SO	v	860	n.a.	82000	350
SE	BA	SO	v	7900	>103	n.a.	>11700
SE	SFB	SO	v	107	30	10000	3000
SE	Almega	SO	v	3900	25	155500	1129
SK	ZCHFP SR	SO	v	53	1	15000	395
UK	BPA*	C	n.a.	91	91	39000	39000
UK	UKMPG*	C	n.a.	9	9	78000	78000

** = Domain overlap with other sector-related employer/ business organisations*

[a] = domain coverage: C = Congruence; O = Overlap; SO = Sectional Overlap; S = Sectionalism (For details see Table 2 / page 4); [b] = type: o = obligatory; v = voluntary; n.a. = not available.

Source: Eurofound's network of European correspondents (2014–2015), administrative data and estimates

Table 9: Density, collective bargaining, consultation and affiliations of employer/ business organisations in ports (2012/13/14)

		Density			CB[a]	CB coverage[b]		F	NAF***
		Comp.	Empl.			Comp.	Empl.		
		(%)	(%)	Sectoral domain in relation to overall domain					
AT	FVSch	7.7	n.a.	n/a	S+M	100	n.a.	regularly	*WKO*; CER
AT	FVMI	n.a.	n.a.	equal	M	<26	n.a.	ad-hoc	*WKO*
AT	FVSp	n.a.	n.a.	equal	M	n.a.	n.a.	regularly	*WKO*
AT	FV ALS-Schifffahrt	n.a.	n.a.	equal	S+M	n.a.	n.a.	no	*WKO*
BE	WBH	n.a.	n.a.	n/a	M	180	11000	yes	*VBO*; FEPORT
BE	WF-FE	n.a.	n.a.	n.a.	M	n.a.	n.a.	yes	
CY	CSA	n.a.	n.a.	n.a.	M	n.a.	175	n.a.	
CY	LLPA	n.a.	n.a.	n.a.	M	n.a.	n.a.	n.a.	
DE	ZDS	0.7	2.0	n/a	M	79	10760	regularly	FEPORT, UNISTOCK
DK	DI	6.1	n.a.	n.a.	M	95	n.a.	regularly	*DA*; FEPORT
DK	DSA	6.0	62.0	equal	M	93	17113	regularly	*DA*; ECSA
ES	ANESCO	n.a.	n.a.	n/a	M	n.a.	n.a.	regularly	*CEOE*; FEPORT, ECASBA
FI	SHL	3.4	14.6	n/a	M**	67	4800	no	*EK*
FI	FSA	1.3	36.4	n/a	M	25	12000	no	ECSA

FI	FPOA	2.5	9.1	n/a	S+M	50	3000-4000	regularly	*EK*; FEPORT
FI	AVAINTA	0.3	0.8	n.a.	M**	5	248	n.a.	*KT*
FR	UPF*	1.3	7.0	n/a	M	50	10000	regularly	ESPO
FR	TLF*	9.0	n.a.	n.a.	M	n.a.	n.a.	regularly	*MEDEF*; CLECAT
FR	UNIM*	3.0	6.4	n/a	M	200	10000	ad-hoc	*MEDEF*; FEPORT
FR	FSA*	n.a.	n.a.	n.a.	M	n.a.	16000	ad-hoc	*MEDEF*; ECSA
EL	ELIME	0.2	3.5	n/a	no	0	0	no	*SETE*; ESPO
EL	SEEN	0.4	9.4	n/a	M	22	5000	no	*SETE*
EL	UGS	n.a.	n.a.	n/a	M	n.a.	n.a.	n.a.	
HR	ZLU	0.4	3.3	n/a	no	0	0	ad-hoc	ESPO
IE	IBEC	n.a.	n.a.	n.a.	S	n.a.	n.a.	ad-hoc	
IT	Assiterminal*	0.3	2.0	n/a	S+M	150	10000	ad-hoc	*Confindustria*; FEPORT
IT	Assologistica*	0.1	0.7	n.a.	S+M	160	10000	regular	*Confindustria, Confetra, Federtrasporto*; FEPORT, ECSLA
IT	Assoporti*	0.1	0.4	n/a	M	n.a.	10000	ad-hoc	ESPO
IT	Fise-Uniport*	0.1	1.0	n/a	S+M	200	10000	regular	*Confindustria, FISE*
IT	Confitarma*	1.0	7.9	n/a	S+M	n.a.	n.a.	n.a.	*Confindustria*; ECSA
IT	Fedarlinea*	0.0	n.a.	n/a	S+M	n.a.	n.a.	n.a.	*Confcommercio*
IT	Assorimorchiatori*	0.1	0.3	n/a	S+M	27	1500	regular	
IT	Federimorchiatori*	0.0	n.a.	n/a	yes	n.a.	n.a.	n.a.	
IT	CE	n.a.	n.a.	n.a.	S+M	n.a.	n.a.	n.a.	*Confindustria*
LT	LJKKA	0.5%	n.a.	>	no	0	0	ad-hoc	*LPK*; FEPORT

LU	GT*	n.a.	n.a.	n.a.	M	n.a.	n.a.	ad-hoc	*CLC*; IRU
LU	FEDIL Shipping*	n.a.	n.a.	n/a	M	5	1500	ad-hoc	*FEDIL*; ECSA
NL	Verocog-AWVN	0.0	n.a.	n/a	S+M	5	400	ad-hoc	*VNO-NCW*; (FEPORT)
PT	AATFL	0.3	2.8	n.a.	M	8	600	ad-hoc	
PT	AANP	n.a.	n.a.	n.a.	M	101	1470	n.a.	
PT	ACOPE	n.a.	n.a.	n.a.	M	150	4800	n.a.	
PT	ANESUL	n.a.	n.a.	n/a	M	99	1493	n.a.	
PT	AOPL	0.2	n.a.	n/a	M	18	334	n.a.	FEPORT
PT	AOPPDL	0.1	1.6	n/a	M	2	330	ad-hoc	FEPORT
PT	APP	0.4	n.a.	n/a	no	0	0	n.a.	ESPO
RO	OP	n.a.	n.a.	n/a	yes	n.a.	n.a.	regular	*CNPR*; FEPORT
SE	SARF	4.7	24.8	n/a	M	n.a.	n.a.	regular	*CSE*; ECS
SE	Sveriges Hamnar*	3.3	9.9	n/a	M	64	4100	regular	*CSE*; ESPO, FEPORT
SE	SAIE*	n.a.	0.8	equal	M	n.a.	350	no	*CSE*; CEPI, Euromines
SE	BA	n.a.	n.a.	n.a.	M	n.a.	n.a.	regular	*CSE*
SE	SFB	1.5	7.2	equal	M	n.a.	3000	ad-hoc	*CSE*; EHA
SE	Almega	1.3	2.7	equal	M	n.a.	n.a.	ad-hoc	*CSE*; CoESS
SK	ZCHFP SR	0.0	2.4	<	M	1	395	regular	*AZZZ SR*; ECEG, CEFIC
UK	BPA*	0.5	12.3	n/a	no	0	0	regular	ESPO
UK	UKMPG*	0.0	24.7	n/a	no	0	0	regular	ESPO

** = Domain overlap with other sector-related employer/business organisations; ** = Indirect collective bargaining involvement via higher-level unit; *** = National affiliations put in italics; for the national level, only cross-sectoral (i.e. peak-level) associations are listed; for the European level sectoral associations only; affiliation put in parenthesis means indirect affiliation via higher-order unit; [a] = Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining; [b] = number of companies/employees covered by collective agreements concluded by the employer organisation within the ports sector; CB = collective bargaining; Comp. = companies; Empl. = employees; F = frequency; NAF* = National and European affiliations; *n.a. = not available; n/a = not applicable.*

Source: Eurofound's network of European correspondents (2014–2015), administrative data and estimates

Table 10: The system of sectoral collective bargaining (2013–14)

Country	CBC (%) (estimates)	Share of MEB in total CBC (%) (estimates)	Extension practices[a]
AT	100%	93%	[2]
BE	100%	100%	[2]
BG	n.a.	n.a.	0
CY	n.a.	n.a.	0
CZ	n.a.	n.a.	n.a.
DE	n.a.	MEB prevailing	0
DK	85-90%	60%	0
EE	21%	0%	0
ES	almost 100%	MEB prevailing	2
FI	almost 100%	100%[b]	2
FR	almost 100%	100%[b]	2
EL	n.a.	MEB prevailing	0
HR	60%	0%	0
HU	2%	0%	0
IE	n.a.	0%	0
IT	100%	100%[b]	[2]
LT	n.a.	0%	0
LV	27%	0%	0
LU	n.a.	MEB prevailing	2
MT	n.a.	0%	0
NL	almost 100%	SEB prevailing	0

PL	n.a.	0%	0
PT	90%	84%	0[c]
RO	n.a.	n.a.	n.a.
SE	>95%	>95%	2
SI	15%	0%	0
SK	16-18%	2%	0
UK	34%	0%	0

CBC = collective bargaining coverage: employees covered as a percentage of the total number of employees in the sector; MEB = multi-employer bargaining relative to single-employer bargaining; SEB = single-employer bargaining; Extension practices (including functional equivalents to extension provisions, i.e. obligatory membership and labour court rulings); [a] = 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalents are put in parentheses; [b] = complemented by single-employer bargaining; [c] = since 2010; n.a. = not available.

Source: Eurofound's network of European correspondents (2014–2015), administrative data and estimates.

Table 11: Tripartite sector-specific boards of public policy (2014–2015)

Country	Name of body and scope of activity	Origin	Trade unions participating	Business associations participating
BE	Flemish Port Commission (VHC) – advisory body of the Flemish government	Statutory	ABVV-BBTK, LBC-NVK, ACLVB	Unizo
BG	Sub-branch Council – no further information provided	Statutory	FITUB	BMC, BCS, EAMA
DK	Education Committee of the Transport Sector – training in warehousing and storage	Statutory	3F	DI, Danish Chamber of Commerce
DK	Education Committee of the Metal Industry – training in skilled maritime trades	Statutory	3F, Dansk Metal	DI
DK	Education Committee for the Maritime Educations	Statutory	SL, MMF, 3F, CO-Sea	DI, Danish Shipowners, DF
ES	Permanent Observatory of the Port Services Market – economic analysis of the port sector and advisory body	Statutory	CCOO, UGT, CETM	Ports authorities
FR	Conseil Supérieur de la Marine Marchande – advisory body of the government	Statutory	CGT, FO, CFDT, CFTC, CFE-CGC	UPF, UNIM

LV	Transport, Communications and Information Technologies Tripartite Cooperation Subcouncil of National Tripartite Cooperation Council	Statutory	LBAS	LDDK
PL	Tripartite Team for Seafaring and Sea Fishery of the Ministry of Infrastructure and Development – advisory body	Statutory	FZZMiR, OZZOiM, KSMMIR NSZZ Solidarnosc	ZAP
RO	Inter-ministerial Committee for the Coordination of an Integrated Maritime Policy of the European Union – advisory body	Statutory	n.a.	n.a.
RO	Social Dialogue Commission of the Ministry of Transport – advisory body	Statutory	BNS, FNSP	CNPR, UPIR
UK	Port Skills and Safety	Agreement	Unite, UMPA, RMT, UNISON	BPA, UKMPG

Source: Eurofound's network of European correspondents (2014–2015)

Table12: ETF (Dockers' Section) and IDC Membership (2015)[+]

Country	ETF	IDC
AT	---	---
BE	ACV-CSC Transcom*, LBC-NVK*, ACLVB-CGSLB*, BBTK-SETCa*, ABVV/BTB*	---
BG	FTW*, FTTUB*, SSB*	---
CY	OMEPEGE-SEK*	SEGDAMELIN-PEO*
CZ	---	---
DE	ver.di*	---
DK	3F*, SL*	(3F*)[a]
EE	EMSA*, EVAF*	---
ES	FSC-CCOO*, SMC-UGT*, FGAMT-CIG*, ELA-Zerbitzuak*	CETM*, LAB-Sindikatua*
FI	AKT*, PRO*, JHL*, FSU*	---
FR	FGTE-CFDT*, FEETS-FO*	FPD-CGT*
EL	OFE*	OMYLE*, DUPPA*
HR	SLRH*, (NSZRL*), (SSZRL*), (LSS*), (SSZLV*), SPH**	---

HU	---	---
IE	SIPTU*, IMPACT*	---
IT	FILT-CGIL*, FIT-CISL*, UILTrasporti*	---
LT	DPS/IDU*	---
LU	---	---
LV	ÜTAF*	
MT	GWU*	MDU*
NL	FNV Bondgenoten*, CNV Vakmensen*	---
PL	FZZMiR*, KSPM NSZZ Solidarnosc*,	---
PT	FESMAR*, SOEMM, OFICIAISMAR	SETC*, STPA, FNSTP
RO	FNSP*, FARUL*	---
SE	Transport*	SHF*
SI	SPS*, SZPD*	
SK	---	---
UK	Unite*, RMT**, TSSA**	(Unite*)[a]

*+ = Membership list confined to the sector-related associations of the countries under consideration; affiliation put in parenthesis means indirect affiliation via higher- or lower-order units; * = Involved in sector-related collective bargaining; ** = No information on collective bargaining involvement; [a] = 3F of Denmark and Unite of the UK do not affiliate to IDC, but one individual local branch (Aarhus Dockworkers Union Local Branch) of 3F and two individual local branches (Felixstowe Dockworkers Union Local Branch and Tilbury Dockworkers Union Local Branch) of Unite do.*

Source: Eurofound's network of European correspondents (2014–2015).

Table 13: FEPORT and ESPO Membership (2015)[+]

Country	FEPORT	ESPO
AT	---	---
BE	WBH*	---
BG	---	Bulgarian Ports Infrastructure Company*[a]
CY	---	Cyprus Ports Authority*[a]
CZ	---	

DE	ZDS*	---
DK	DI*	---
EE	---	---
ES	ANESCO*	---
FI	FPOA*	---
FR	UNIM*	UPF*
EL	---	ELIME
HR	---	ZLU
HU	---	---
IE	---	---
IT	Assiterminal*, Assologistica*	Assoporti*
LT	LJKKA	---
LU	---	---
LV	---	---
MT	---	Authority for Transport Malta**[a]
NL	(Verocog*)	---
PL	---	---
PT	AOPL*, AOPPDL*	APP
RO	OP*	---
SE	Sveriges Hamnar*	Sveriges Hamnar*
SI	---	---
SK	---	---
UK	**---**	**BPA, UKMPG**

*+ = Membership list confined to the sector-related associations of the countries under consideration; affiliation put in parenthesis means indirect affiliation via higher-order unit; * = Involved in sector-related collective bargaining; ** = No information available on collective bargaining involvement; [a] = Company/authority rather than associational member.*

Source: EIRO/Eurofound's network of European correspondents (2013/14)

Annex 2: List of abbreviations

Country	Abbreviation	Full Name
AT	FV ALS-Schifffahrt	Association of Bus, Aviation and Shipping Companies – Shipping Group
	FVMI	Austrian Petroleum Industry Association
	FVSch	Association of Railway Companies
	FVSp	Association of Freight Forwarding Companies
	GPA-djp	Union of Salaried Employees, Graphical Workers and Journalists
	ÖGB	Austrian Trade Union Federation
	PRO-GE	Production Workers’ Union
	vida	Vida Trade Union
	WKO	Austrian Federal Economic Chamber
BE	ABVV-FGTB	Belgian General Federation of Labour
	ABVV/BTB - FGTB/UBT	Belgian Transport Union of the Belgian General Federation of Labour
	ACLVB - CGSLB	Federation of Liberal Trade Unions of Belgium
	ACV/CSC	Confederation of Christian Trade Unions
	ACV/CSC Transcom	Confederation of Christian Trade Unions – Transport and Communication
	BBTK-SETCa	Union of Employees, Technicians, Professional and Managerial Staff
	LBC-NVK	National Union for Executives
	VBO	Belgian Federation of Employers
	WBH	Federation of Belgian Port Employers
	WF-FE	Employer Organisation for International Trade, Transport and Logistics
BG	CITUB	Confederation of Independent Trade Unions of Bulgaria
	FTTUB	Federation of Transport Trade Unions of Bulgaria
	FTW	Federation of Transport Workers
	SSB	Seamen’s Syndicate
	Podkrepa	Confederation of Labour Podkrepa
CY	CSA	Cyprus Shipping Association
	LLPA	Limassol Licenced Porters Association
	OMEPEGE	Federation of Transport, Petroleum and Agriculture

		Workers
	SEGDAMELIN	Cyprus Agriculture, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union
	PEO	Pancyprian Federation of Labour
	SEK	Cyprus Workers' Federation
CZ	---	---
DE	DGB	German Trade Union Confederation
	ver.di	United Services Union
	ZDS	Association of German Seaport Operators
DK	3F	United Federation of Danish Workers
	ADU	Aarhus Dockworkers Union Local Branch
	Co-Sea	Co-Sea
	DA	Confederation of Danish Employers
	DI	Confederation of Danish Industry
	DSA	Danish Shipowners' Association
	LO	Danish Confederation of Trade Unions
	MMF	Danish Engineers' Association
	SL	Danish Navigators Association
EE	EAKL	Estonian Trade Union Confederation
	EMSA	Estonian Seamen's Independent Union
	EVAF	Estonian Federation of Water Transport Workers' Unions
ES	ANESCO	National Association of Stevedoring Companies and Ship Agencies
	CCOO	Trade Union Confederation of Workers' Commissions
	CEOE	Spanish Confederation of Employers' Organisations
	CETM	State Coordinator of Sea Workers
	CIG	Galician Inter-union Confederation
	ELA-Zerbitzuak	Basque Workers' Solidarity
	FGAMT-CIG	Federation of Food, Sea, Transport, Textiles and Communications Workers of the Galician Inter-union Confederation
	FSC-CCOO	Federation of Citizens' Services of the Trade Union Confederation of Workers' Commissions
	LAB-Sindikatua	Abertzales Workers Commission
	SMC-UGT	Federation of Services for Mobility and Consumation Workers of the General Workers' Confederation

	UGT	General Workers' Confederation
FI	AKT	Transport Workers' Union
	AVAINTA	AVAINTA Employers
	EK	Confederation of Finnish Industries
	ERTO	Federation of Special Service and Clerical Employees ERTO
	FEA	Finnish Engineers's Association
	FMPA	Finnish Maritime Pilots' Association
	FPOA	Finnish Port Operators' Association
	FSA	Finnish Shipowners' Association
	FSU	Finnish Shipofficers' Union
	JHL	Trade Union for the Public and Welfare Sectors
	KT	Local Government Employers KT
	PARDIA	Federation of Salaried Employees Pardia
	PRO	Trade Union Pro
	SAK	Confederation of Finnish Trade Unions
	SHL	Finnish Freight Forwarders' Association
	SMU	Finnish Seamen's Union
	STTK	Finnish Confederation of Professionals
FR	CFDT	French Democratic Confederation of Labour
	CFE-CGC	French Confederation of Professional and Managerial Staff – CGC
	CFTC	French Christian Workers' Confederation
	CGC	General Confederation of Professional and Managerial Staff
	CGT	General Confederation of Labour
	CGT-FO	General Confederation of Labour – Force Ouvrière
	CGT Transports	National Federation of Transport Unions of the General Confederation of Labour
	FEETS-FO	Federation of Infrastructure, Transport and Services of FO
	FGT-CFTC	General Federation of Transport of the French Christian Workers' Confederation
	FGTE-CFDT	General Federation of Transports and Equipment of the French Democratic Confederation of Labour
	FNSM-CGT	National Federation of Maritime Unions of the General

		Confederation of Labour
	FNCAMPD-CGC	National Union of Managerial Staff and Technicians of Ports and Docks – CGC
	FO	Force Ouvrière
	FO TL	Transport and Logistics National Union – Force Ouvrière
	FOMM-CGT	Federation of Merchant Marine Officers of the General Confederation of Labour
	FPD-CGT	Ports and Docks Federation of the General Confederation of Labour
	FSA	French Shipowners' Association
	FT-CFE-CGC	Federation of Transport of the French Confederation of Professional and Managerial Staff – CGC
	MEDEF	French Employers' Confederation
	TLF	Union of Transport and Logistics Companies of France
	UNIM	National Association of French Seaport Terminal Operators
	UPF	French Ports Organisation
EL	DUPPA	Dockworkers'' Union of Piraeus Port Authority
	ELIME	Hellenic Ports Association
	GSEE	Greek General Confederation of Labour
	OFE	Federation of Loaders and Unloaders of Greece
	OIYE	Federation of Private Employees of Greece
	OMYLE	Federation of Port Workers of Greece
	PASENT	Panhellenic Association of Employees in Shipping and Tourism
	PNO	Panhellenic Seamen's Federation
	SEEN	Greek Shipowners' Association for Passenger Ships
	SETE	Association of Greece Tourism Enterprises
	UGS	Union of Greek Shipowners
HR	HURS	Croatian Association of Workers' Trade Unions
	LSS	Independent Ports Trade Union
	NSPLS	Independent Trade Union of Workers of the Port of Split
	NSZRL	Independent Trade Union of Workers of the Port of Rijeka
	SLRH	Dockers' Union of Croatia
	SSLRLD	Independent Dockers' Unions of the Port of Dubrovnik

	SSLRLP	Independent Trade Union of the Port of Ploce
	SSSH	Federation of Autonomous Trade Unions of Croatia
	SSZLV	Independent Trade Union of the Port of Vukovar
	SSZRL	Autonomous Trade Union of Workers of the Port of Rijeka
	URSH	Association of Workers’ Trade Unions of Croatia
	ZLU	Croatian Association of Port Authorities
HU	GOES	Oil and Gas Suppliers United Trade Union
IE	IBEC	Irish Business and Employers Confederation
	ICTU	Irish Congress of Trade Unions
	IMPACT	Irish Municipal, Public and Civil Trade Union
	SIPTU	Services, Industrial, Professional and Technical Union
	SUI	Seamen’s Union of Ireland
	TEEU	Technical Engineering and Electrical Union
	UCATT	Union of Construction, Allied Trades and Technicians
	UNITE	Unite Trade Union
IT	Assiterminal	Italian Association of Terminal Operators
	Assologistica	Assologistica
	Assoporti	Italian Ports Association
	Assorimorchiatori	Italian Tug-owners Association
	CE	Federation of Associations of the Energy Industry
	CGIL	General Confederation of Italian Workers
	CISL	Italian Confederation of Workers’ Unions
	Confcommercio	Confcommercio
	Confindustria	Confindustria
	Confitarma	Italian Shipowners Confederation
	Fedarlinea	Italian Federation of Shipping Lines
	Federimorchiatori	Italian Tug-owners Federation
	FEMCA-CISL	Federation of Energy, Fashion, Chemical and Allied Industries – CISL
	FILCTEM-CGIL	Italian Federation of Chemical, Textiles, Entergy and Manufacturing Workers – CGIL
	FILT-CGIL	Italian Transport Workers’ Federation – CGIL
	FISE	Association of Service Enterprises

	FISE-UNIPORT	National Union of Port Companies – FISE
	FIT-CISL	Italian Transport Federation – CISL
	UGL	General Union of Work
	UGL-Chimici	National Chemical Federation – UGL
	UIL	Italian Union of Workers
	UIL-Trasporti	Italian Transport Workers' Union
	UILTEC-UIL	Italian Union of Textiles, Energy and Chemical Workers – UIL
LT	DPS/IDU	Dockers' Trade Union
	LADPS	Trade Union of Lithuanian Transport Workers
	LGPF	Lithuanian Federation of Railway Workers
	LJKKA	Association of Lithuanian Stevedoring Companies
	LJS	Union of Lithuanian Mariners
	LKADPSF	Lithuanian Federatoin of Roads and Transport Workers' Unions
	LPK	Lithuanian Confederation of Industrialists
	LPS Solidarumas	LPS 'Solidarumas'
	LPSK	Lithuanian Trade Union Confederation
	LVTDPF	Lithuanian Federation of Water Transport Workers' Unions
LU	CLC	Commerce Confederation of Luxembourg
	FEDIL	Business Federation Luxembourg
	FEDIL Shipping	Shipping Association of Luxembourg
	GT	Union of Transport Companies
	LCGB	Luxembourg Confederation of Christian Unions
	LCGB-Transport	Luxembourg Confederation of Christian Unions – Transport
	OGBL	Independent Trade Union Confederation of Luxembourg
	OGBL-Transport	Independent Trade Union Confederation of Luxembourg – Transport
LV	LBAS	Free Trade Union Federation of Latvia
	LTFJA	Seafarers' Union of Merchant Fleet
	ÜTAF	Water Transport Trade Union Federation
MT	CMTU	Confederation of Malta Trade Unions
	GWU	General Workers' Union

	MDU	Malta Dockers’ Union
	UHM	United Workers’ Union
NL	CNV	Christian Federation of Trade Unions
	CNV Vakmensen	Christian Federation of Trade Unions – Vakmensen
	FNV	Federation of Dutch Trade Unions
	FNV Bondgenoten	Federation of Dutch Trade Unions – Bondgenoten
	Verocog	Association of Independent Superintending Companies
	VNO-NCW	Confederation of Netherlands Industries and Employers
PL	FZZ	Trade Union Forum
	FZZMiR	Seamen’s and Fishermen’s Trade Union Federation
	KSMMiR NSZZ Solidarnosc	National Maritime Section of the Independent Self-governing Trade Union ‘Solidarnosc’
	KSPM NSZZ Solidarnosc	National Section of Port Workers of the Independent Self-governing Trade Union ‘Solidarnosc’
	NSZZ Solidarnosc	Independent Self-governing Trade Union ‘Solidarnosc’
	NSZZ Solidarnosc-80	Independent Self-governing Trade Union ‘Solidarnosc’-80
	OPZZ	All-Poland Alliance of Trade Unions
	OZZOiM	Polish Seafarers’ Union
	WZZPGM	Free Trade Union of Maritime Economy Workers
PT	AANP	Association of Shipping Agents of Portugal
	AATFL	Association of River and Local Transport Shipping Company Owners
	ACOPE	Association of Fish Merchants
	ANESUL	Association of Shipping Agents and Port Operators
	AOPL	Operators’ Association of the Port of Lisbon
	AOPPDL	Association of Port Operators of the Ports of Douro and Leixoes
	APP	Association of the Ports of Portugal
	CGTP-IN	General Confederation of Portuguese Workers
	FESMAR	Federation of Sea Workers’ Trade Unions
	FNSTP	National Federation of Workers’ Unions of Ports
	OFICIAISMAR	Union of Masters, Officers, Pilots, Commissioners and Engineers of the Merchant Marine
	SETC	Portuguese Dockworkers’ Union

	SIMAMEVIP	Union Workers at the Merchant Marine, Transport Agents and Fishery
	SINDEPESCAS	Democratic Union of Fishery Workers
	SITESE	Union of Service Workers and Technicians
	SOEMM	Union of Officers and Machine Engineers of the Merchant Marine
	STPA	Union of Workers of the Port of Aveiro
	UGT	General Union of Workers
RO	BNS	National Trade Union Block
	CNPR	National Confederation of Romanian Employer Associations
	CNSLR Fratia	National Confederation of Free Unions of Romania – 'Brotherhood'
	FARUL	FARUL Galati Danube Workers' Trade Union
	FNSP	National Federation of Port Workers' Unions
	OP	Constanta Port Operators Association
SE	Almega	Almega Service Association
	BA	Swedish Road Transport Employers' Association
	CSE	Confederation of Swedish Enterprises
	Ledarna	Sweden's Organisation for Managers
	LO	Swedish Trade Union Confederation
	Lotsförbundet	Swedish Pilots' Association
	Pappers	Swedish Paper Workers' Union
	SACO	Swedish Confederation of Professional Associations
	SAIE	Swedish Association of Industrial Employers
	SARF	Swedish Shipowners' Employer Association
	SBF	Maritime Officers' Association
	SEKO	Union of Service and Communication Employees
	SFB	Swedish Aviation Industry Group
	SHF	Swedish Dockworkers' Union
	SI	Swedish Association of Graduate Engineers
	ST	Union of Civil Servants
	Sveriges Hamnar	Ports of Sweden Association
	TCO	Swedish Confederation of Professional Employees
	Transport	Swedish Transport Workers' Union

	Unionen	Trade Union for Professionals in the Private Sector
SI	Alternativa	Trade Union Confederation Alternativa
	KS-90	Trade Union Confederation KS-90
	SPDS	Dockers' Union of Slovenia
	SPS	Seamen's Union of Slovenia
	SZPD	Union of Crane Operators of the Port of Koper
SK	AZZZ SR	Federation of Employers' Associations
	ECHOZ	Energy and Chemical Trade Union Association
	KOZ SR	Confederation of Trade Unions
	POZ	Gas Trade Union Association
	ZCHFP SR	Association of the Chemical and Pharmaceutical Industry of the Slovak Republic
UK	BPA	British Ports Association
	RMT	National Union of Rail, Maritime and Transport Workers
	TSSA	Transport, Salaried Staffs Association
	TUC	Trades Union Congress
	UKMPG	UK Major Ports Group
	UNITE	Unite Trade Union
EUROPE		
	CEC	European Managers
	CEFIC	European Chemical Industry Council
	CEPI	Confederation of European Paper Industries
	CER	Community of European Railway and Infrastructure Companies
	CLECAT	European Liaison Committee of Common Market Forwarders
	CoESS	Confederation of European Security Services
	ECASBA	European Community Association of Ship Brokers and Agents
	ECEG	European Chemical Employers Group
	ECSA	European Community Shipowners' Association
	EFBWW	European Federation of Building and Woodworkers
	EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions
	EFJ	European Federation of Journalists

	EMPA	European Maritime Pilots' Association
	EPSU	European Federation of Public Service Unions
	ESPO	European Sea Ports Organisation
	ETF	European Transport Workers' Federation
	ETF (ports)	European Transport Workers' Federation – Dockers' Section
	Eurocadres	Council of European Professional and Managerial Staff
	Euromines	European Association of Mining Industries, Metal Ores and Industrial Minerals
	FEANI	European Federation of National Engineering Associations
	FEPORT	Federation of European Private Port Operators
	FICT	European Managers in the Transport Industry
	IDC	International Dockworkers Council
	IndustriAll Europe	IndustriAll European Trade Union
	IRU	**International Road Transport Union**
	UNI Europa	Union Network International – Europe
	UNISTOCK	Association of professional portside storekeepers in the food and feed chain

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