



**Representativeness of the  
European social partner organisations:  
Maritime transport sector**

*This study provides information designed to encourage sectoral social dialogue in the maritime transport sector. The aim of Eurofound's series of representativeness studies is to identify the relevant national and supranational social partner organisations in the field of industrial relations in selected sectors. Top-down and bottom-up analyses of the maritime transport sector in the 25 EU Member States covered in the study reveal that ETF and ECSA are the most important European-level social partner organisations in the sector based on their membership.*

## **Introduction**

### **Objectives of the 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 maritime transport sector, and to show how the national actors relate to the sector's European interest associations of labour and business. The impetus for this study, and for similar studies in other sectors, 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 \(TFEU\)](#) and to be eligible for participation in European sectoral social dialogue committees. The effectiveness of the 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.

### **Overview of the process and methodology**

#### *Criteria for inclusion in the study*

European associations are analysed via the 'top-down' approach if they:

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

The Commission may decide to include other EU sector-related organisations in the study if relevant, for example, a sector-related organisation that has recently requested to be consulted under Article 154 of the TFEU.

### **Demarcation of the sector**

Every sector is demarcated in terms of the Statistical Classification of Economic Activities in the European Community (NACE) codes. All existing sectoral social dialogue committees have been demarcated with a NACE code, which defines the scope of economic activities covered by the committee. The NACE code to be applied in each sectoral representativeness study is confirmed by the European Commission after consultation with the social partners.

In this study, the maritime transport sector is defined as embracing NACE (Rev. 2) 50.10, 50.20 and 52.22. This includes the following activities:

- 50.10 – Sea and coastal passenger water transport;
- 50.20 – Sea and coastal freight water transport;
- 52.22 – Service activities incidental to water transportation.

### **Collection of data**

The information in the study was collected through 25 national contributions. In this representative study, Austria, Hungary and Slovakia were not included since they have no

maritime ports and, therefore, the maritime transport sector does not exist in these countries. The Czech Republic and Luxembourg also have no maritime ports but they record some companies and workers in this sector and so were included in the study.

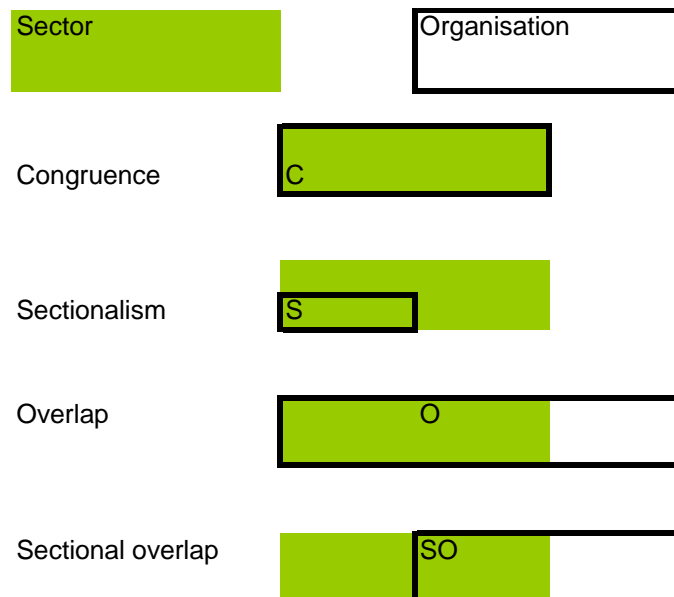
Eurofound has a network of national correspondents with expertise in industrial relations, covering all Member States. These experts are required to gather data on all relevant organisations at national level and to approach them by telephone or email, using standardised questionnaires. While the questionnaires are in English, correspondents can interview or contact the organisation in the relevant national language. The questionnaires are completed by the national correspondents.

The methodology follows the [guidance given on the Eurofound website on conducting representativeness studies](#).

### Determining sector-relatedness

European and national social partners are considered to be ‘sector-related’ if their membership domain relates to the sector in one of the ways shown in Figure 1. Put simply, any organisation that organises membership in the sector is deemed to be sector-related.

Figure 1: Domain patterns



### Inclusion of national associations

A national association is considered to be a relevant sector-related interest association if it meets both criteria A and B, as follows:

- A. The association’s domain relates to the sector;
- B. The association is either:
  - affiliated to a European-level organisation that is analysed in the study within the top-down approach (independent of its involvement in collective bargaining); or
  - regularly involved in sector-related collective bargaining.

## Employment and economic trends

### Employment characteristics

Finding reliable statistics on sectoral employment in the maritime transport sector is problematic. The detailed sectoral definition used in this study, described for some activities such as service activities incidental to water transportation at the fourth NACE hierarchical level, hinders access to some employment figures due to the fact that common sources, such as the European Union Labour Force Survey (EU-LFS), provide information only at the third hierarchical level. In addition, maritime transport is a globalised and flexible sector, encompassing temporary and non-EU workers, both of which have become increasingly common. For these reasons, complete and accurate statistics on seafarers probably represent an unachievable target, as noted by the [Report of the Task Force on Maritime Employment and Competitiveness and Policy Recommendations to the European Commission \(PDF\)](#).

According to the European Commission's [2010 report on sectoral social dialogue](#), based on EU-LFS data, the EU maritime transport sector employed some 300,000 people in more than 10,000 companies in 2008 (50.10, 50.20 and 52.22 NACE codes). More than 90% of seafarers have employee status and full-time work predominates. Male workers make up the majority, accounting for around 67%.

In 2014, the EU-LFS estimated that there were 97,951 people employed in sea and coastal passenger water transport and 128,699 employed in sea and coastal freight water transport. Therefore, 226,650 people in total were employed in the maritime transport sector, excluding service activities incidental to water transportation.

A [study on the employment of EU seafarers \(PDF\)](#) estimated that the number of active seafarers in maritime EU Member States plus Norway was 254,119 in 2010. The total number of seafarers in western Europe countries (EU plus Norway) was 146,231 and the number from eastern Europe was 107,988. This estimate was based on the 2010 update of the International Shipping Federation (IFS)/Baltic and International Maritime Council (BIMCO) Manpower Study, which collects data from questionnaires sent to governments, shipping companies and crewing experts.

Alternative sources consulted, such as [annual reports](#) from the European Community Shipowners' Association (ESCA), do not provide aggregate information regarding seafarers' employment at EU level. As far as the European Transport Workers' Federation (ETF) is concerned, the publications (policy papers and projects) on its website did not contain employment figures.

### Economic background and employment trends at EU level

Maritime transport is an essential sector for the European economy. According to the [European Commission's report on the EU's maritime transport policy](#), 80% of world trade is carried by sea while short-sea shipping carries 40% of intra-European freight. Moreover, maritime transport has also an impact on citizens' quality of life, offering transport services to both tourists and inhabitants of islands and peripheral regions. Thus, more than 400 million sea passengers pass through European ports each year. These data refer to the total of 23 countries: Austria, the Czech Republic, Luxembourg, Hungary and Slovakia have no maritime ports.

Maritime transport is a globalised sector. The adaptation of European shipping to global economic pressures has triggered crucial structural changes in the sector. Competitive pressure from shipping nations around the world has increased significantly due to globalisation. In the European Commission's view as expressed in its [2009 communication](#), some of the measures implemented by Member States, in line with the [Commission's Community Guidelines on State aid to maritime transport](#), have favoured keeping part of the fleet on European registers and creating jobs for European seafarers. Nevertheless, European flags (that is, ships registered under

Member States' countries) continue to face competition from those on the registers of third countries. Foreign competitors have significant advantages in terms of government support, access to cheap capital and abundant labour, or flexible enforcement of internationally agreed standards.

The economic crisis that began in 2008 brought about other pressures related to factors such as:

- the risks of overcapacity in certain market segments;
- protectionist trade measures by third countries;
- volatility in energy markets;
- loss of expertise due to the scarcity of skilled human resources in Europe.

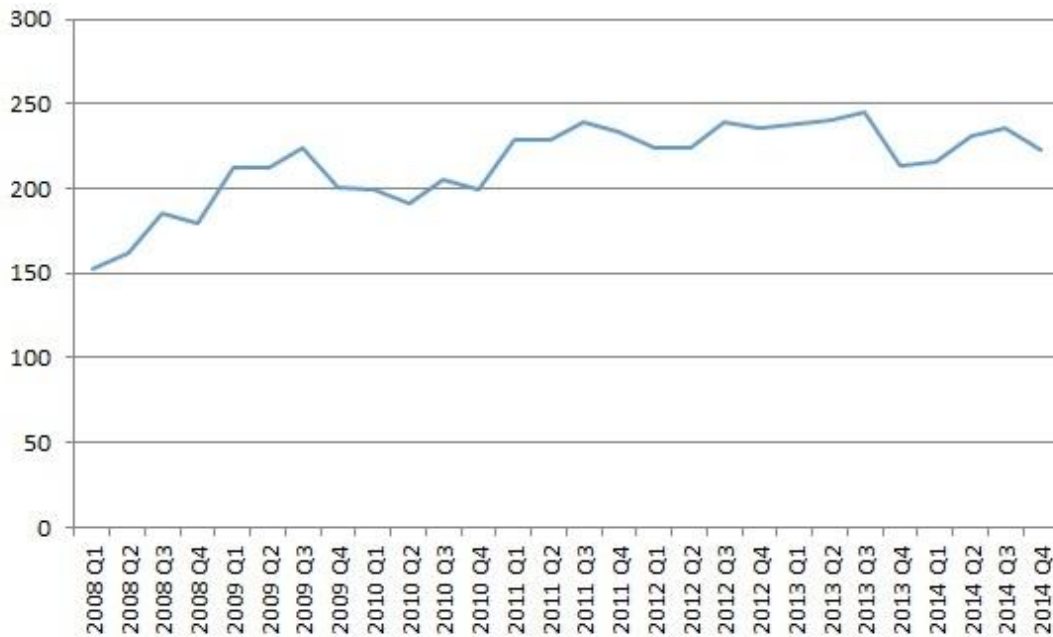
As emphasised by the [European Commission's strategic goals and recommendations for the EU's maritime transport policy](#), these factors could lead shipping head offices and maritime industries to relocate overseas.

### **Employment trends at EU level**

Figure 2 shows the quarterly employment evolution in the EU28 from 2008 to 2014. It also illustrates the cyclical developments within each year. The data exclude service activities incidental to water transportation. Thus, sectors included are 'sea and coastal passenger water transport' (NACE code 50.10) and 'sea and coastal freight water transport' (NACE code 50.20).

Cyclical developments in the maritime transport sector show that sectoral employment increases every year in the third quarter and declines every year in the fourth quarter, probably due to the effects of increased passenger demand in the summer season. The most pronounced cyclical employment rises were recorded in the third quarters of 2008 (14%) and 2010 (7%). The most pronounced cyclical employment decreases occurred in the fourth quarters of 2009 (-10%) and 2013 (-13%). In the third quarter of 2013, total sectoral employment reached its peak at 245,593 people employed compared with 235,792 in the third quarter of 2014.

Figure 2: Evolution of quarterly employment in the maritime transport sector, 2008–2014



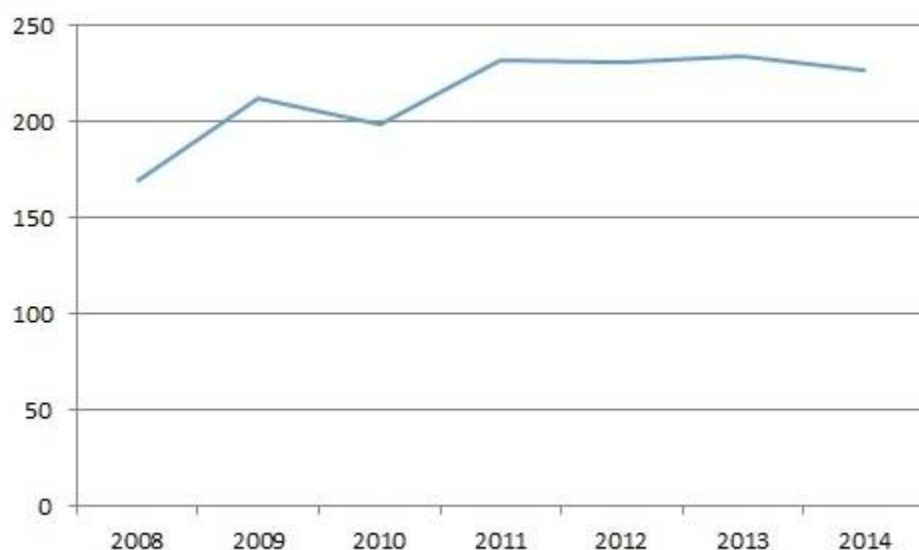
Notes: In thousands

NACE codes 50.10 and 50.20 only (that is, figures exclude service activities incidental to water transportation)

Source: Eurostat, EU-LFS

Besides this cyclical evolution, attention should be drawn to the evolution of the annual sectoral employment (average of the four quarters of the year) as shown in Figure 3. The increase in annual employment was highest from 2008 and 2009 (25%). From 2009 to 2010, annual employment decreased by 6% while from 2010 to 2011 it rose again, increasing by 16%. From 2011 to 2013, employment remained relatively stable, decreasing again from 2013 to 2014 by 3%. Thus, the tendency is an upward growth pattern, albeit uneven.

Figure 3: Evolution of annual employment in the maritime transport sector, 2008–2014



Notes: In thousands

NACE codes 50.10 and 50.20 only (that is, figures exclude service activities incidental to water transportation)

Source: Eurostat, EU-LFS

### Employment trends at national level

One key point relates to the cross-country variations in the importance of the maritime transport sector. According to [Eurostat's 2013 analysis of the maritime sectors](#), with regard to sea and coastal freight water transport, the Netherlands recorded the highest share (14.8%) of the goods handled in EU ports, followed by the UK (14.1%), Italy (13.6%) and Spain (10.3%). In terms of sea and coastal passenger water transport activities, Italy was the most important country, with 87.7 million passengers or 22.2% of all passengers at EU ports, followed closely by Greek ports at 20.2% and Denmark with 10.6%. Data refer to 2010.

The same report shows that Italy recorded high values for both maritime passengers and goods. The Netherlands showed a clear concentration on maritime transport of goods while Greek ports were predominately involved in the maritime transport of passengers.

The small size of the maritime transport sector in many countries means that figures from the EU-LFS are not available for several countries and subsectors or that there are serious doubts concerning their reliability due to the very small sample. Thus the data provided in this section of the study come from national sources. These figures have been collected through Eurofound's Network of European correspondents. However, these figures are not strictly comparable. They come from different national sources using different methodologies (for example, surveys and administrative registers) and they include different types of workers (for example, foreign workers working for national companies, or only national workers).

Tables 1 and 2 give a general overview of the development of the sector from 2008 to 2013 (or the closest year with available data). Table 1 presents figures on total employment in 2013, differences in employment from 2008 to 2013, female employment as a percentage of total employment in the sector, and employees as a percentage of employment in the sector. Table 2

presents figures on the number of companies in the sector and differences in the number of companies from 2008 to 2013.

**Table 1: Employment in the maritime transport sector, 2013**

	<b>Total</b>	<b>Difference in employment 2008–2013 (%)</b>	<b>Female employment as % of total employment in the sector</b>	<b>Employees as % of total employment in the sector</b>	<b>Sectoral employment as % of total employment in the economy</b>	<b>Source</b>
<b>BE</b>	1,135	-2.0	6.7	100.0	0.3	HVKZ-CSPM
<b>BG</b>	2,932	-49.6	17.0	100	0.1	National Statistical Institute
<b>CY</b>	463	-88.6	na	na	0.1	Statistical Service of Cyprus, Business Register (2013)
<b>CZ</b>	1,200	9.1	16.7	100.0	0.0	Czech Statistical Office, Labour Force Survey
<b>DE<sup>a</sup></b>	21,000	na	42.9	89.9	na	Federal Statistical Office
<b>DK</b>	12,771	-10.6	21.6	99.2	na	Statistics Denmark, Statistikbanken RAS300
<b>EE</b>	16,100	1.9	35.4	95.0	2.6	Statistics Estonia based on Labour Force Survey
<b>EL</b>	60,592	-20.5	23.7	90.4	1.7	Hellenic Statistical Authority
<b>ES</b>	14,800	-30.2	30.4	98.6	0.1	Spanish Labour Force Survey (Encuesta de Población Activa)
<b>FI</b>	9,818	-13.7	na	99.1	0.4	Statistics Finland (LFS)
<b>FR</b>	12,000	-22	5.3	na	na	Armateurs de France
<b>HR</b>	2,800	1.9	17.9	99.5	0.3	Croatian Bureau of Statistics
<b>IE</b>	1,393	-25.3	na	87.2	0.1	CSO Census
<b>IT</b>	39,161	3.3	8.8	94.9	0.2	National Institute of Statistics (Istat), Statistiche nazionali sulla



						struttura delle imprese
<b>LT</b>	na	na	na	na	na	Eurostat, Annual detailed enterprise statistics for services
<b>LU</b>	893	26.1	14.6	na	0.2	STATEC, IGSS
<b>LV</b>	1,844	143.0	35.2	99.9	0.2	Central Statistical Bureau of Latvia (CSP), Yearly survey of enterprises and institutions
<b>MT</b>	798	-24.2	na	91.5	0.5	National Statistics Office (NSO)
<b>NL</b>	49,407	18.4	25.0	61.3	0.4	Maritieme Monitor 2014 Havenmonitor 2013 CBS Statline
<b>PL</b>	2,700	22.7	na	na	0.0	Central Statistical Office (GUS)
<b>PT<sup>b</sup></b>	22,589	764.5	27.5	93.7	0.5	Censos 2001, 2011
<b>RO</b>	429,000	1.7	15.5	34.5	5.0	National Institute of Statistics
<b>SE</b>	na	na	na	na	na	na
<b>SI</b>	434	158.3	26.0	95.2	0.0	Statistical Register of Employment (SRDAP)
<b>UK</b>	55,500	-28.1	19.3	97.7	0.2	ONS Labour Force Survey (fourth quarter)

Notes: na = not available. <sup>a</sup> 2014; <sup>b</sup> 2001 and 2011.

Source: Eurofound Network of European correspondents (2014), national statistics.

**Table 2: Number of companies in the maritime transport sector**

	<b>Number of companies 2013</b>	<b>Difference in number of companies 2008–2013 (%)</b>	<b>Source</b>
<b>BE</b>	20	-20.0	Royal Belgian Shipowners' Association
<b>BG</b>	228	-21.9	National Statistical Institute
<b>CY</b>	64	-12.3	Statistical Service of Cyprus, Business Register (2013)
<b>CZ</b>	33	-15.4	Czech Statistical Office
<b>DE</b>	2,835	-1.6	Federal Statistical Office, company register
<b>DK</b>	501	-12.6	Statistics Denmark, Statistikbanken GF2
<b>EE</b>	1,240	40.4	Statistics Estonia on the basis of the annual statistical questionnaire EKOMAR
<b>EL</b>	5,817	-19.7	Hellenic Statistical Authority
<b>ES</b>	447	0.9	DIRCE
<b>FI</b>	347	13.8	Statistics Finland
<b>FR</b>	872	34.2	Insee Annual Business Statistics Programme/Esane
<b>HR</b>	553	-9.3	Croatian Chamber of Commerce – Biznet
<b>IE</b>	na	na	na
<b>IT</b>	2,756	18.9	National Institute of Statistics (Istat), Statistiche nazionali sulla struttura delle imprese
<b>LT</b>	29	-12.1	Eurostat, Annual detailed enterprise statistics for services
<b>LU</b>	222	-19.3	STATEC, IGSS
<b>LV</b>	84	27.3	Central Statistical Bureau of Latvia (CSP), Yearly survey of enterprises and institutions
<b>MT</b>	207	16.9	National Statistics Office (NSO)
<b>NL</b>	900	-8.6	Maritime Monitor 2014
<b>PL</b>	312	97.5	Central Statistical Office (GUS)
<b>PT</b>	2,391	5.3	Statistics Portugal
<b>RO</b>	na	na	na
<b>SE</b>	983	7.9	Swedish Statistics
<b>SI</b>	46	109.1	Statistical Register of Employment
<b>UK</b>	1,900	-3.8	ONS UK Business: Activity, Size and Location, 2013

*Note: na = not available.*

*Source: Eurofound Network of European correspondents (2014), national statistics.*

Data collected through Eurofound's Network of European correspondents show important cross-country differences with regard to the impact of the economic crisis on the maritime transport

sector. The following 11 countries recorded an increase in employment from 2008 to 2013: Croatia, the Czech Republic, Estonia, Italy, Latvia, Luxembourg, the Netherlands, Poland, Portugal, Romania and Slovenia. However, the following 10 countries recorded a decrease in the same period: Belgium, Bulgaria, Cyprus, Denmark, Finland, Greece, Ireland, Malta, Spain and the UK. For France, Germany, Lithuania and Sweden, information was not available.

Countries most affected by the crisis were Cyprus (a fall in employment of 89% from 2008 to 2013), Bulgaria (-50%) and Spain (-30%). In contrast, Slovenia (158%) and Latvia (143%) recorded the most pronounced employment increases in this period. It is also worth noting the case of Portugal, which recorded an employment increase equivalent to 764%. However, the figures provided by the national correspondent cover the period 2001–2011 and are therefore not strictly comparable.

The number of companies in the sector decreased in 12 countries out of the 23 for which data are available for 2008 and 2013 (or the years as referenced). In Croatia, the Czech Republic, Estonia, Latvia, Luxembourg and Poland, the number of companies decreased while employment increased. This could reflect a process of concentration of the sector's company structure.

The data in Table 1 also show that male employment in the sector is higher than female employment in all countries with available data. Germany is the country where the gender gap is least pronounced, with women accounting for 43% of total employment. However, this may be caused by different proportions of land and on-board workers in Germany.

Table 1 also shows that that self-employment and other non-employee relationships such as family workers are widespread only in Romania and the Netherlands where those employment relationships account for 65% and 39% respectively.

## National level of interest representation

The national-level analysis of interest representation focuses on:

- membership domain and the strength of organisations;
- the organisations' role in collective bargaining;
- their role in public policymaking.

### Membership domain and strength

This section focuses on quantitative data about the membership and relative strength of organisations within the maritime transport sector. Data were collected through Eurofound's Network of European correspondents. The definition of membership and density used in this study are given in Table 3.

**Table 3: Definitions of membership and density**

Type of organisation	Membership	Sectoral density
<b>Trade union</b>	Number of active members in employment. Number of active members in employment in the maritime transport sector.	Sectoral density: Number of active members in employment in the maritime transport sector divided by the total number of employees in the maritime transport sector.
<b>Employer organisation</b>	Number of member companies. Number of employees working in member companies. Number of member companies in the maritime transport sector. Number of employees working in member companies in the maritime transport sector.	Sectoral density (companies): Number of member companies in the maritime transport sector divided by the total number of companies in the sector. Sectoral density (employees): Number of employees working in member companies in the maritime transport sector divided by the total number of employees in the maritime transport sector.

### Trade unions or employee interest representation

Tables A1 and A2 (Annex 1) present the trade unions' data on their domains and membership strength. The tables list all sector-related organisations that are either involved in collective bargaining and/or affiliated to ETF.

In each of the 25 EU Member States covered by this study, at least one sector-related trade union has been identified. In total, the study has identified 90 trade unions that meet the criteria for inclusion. As shown in Table 4, four countries recorded only 1 sector-related trade union, five countries recorded two, four countries recorded three, while 12 countries recorded four or more. Therefore, a pluralistic structure exists in most of the countries. Moreover, the union landscape in the maritime transport sector is very fragmented in some countries, including France (nine trade unions), Ireland, Portugal and Slovenia (six trade unions each), and the Netherlands, Spain and the UK (five trade unions each).

**Table 4: Number of trade unions in the maritime transport sector per country**

Number of trade unions	Countries
<b>One</b>	CZ, HR, LT, RO
<b>Two</b>	CY, DE, EE, EL, LU
<b>Three</b>	BG, LV, MT, PL
<b>Four or more</b>	BE, DK, ES, FI, FR, IE, IT, NL, PT, SE, SI, UK

### Collective bargaining

A total of 74 trade unions out of 80 with available information are involved in sector-related collective bargaining. This indicates that 92% of the trade unions identified take part in collective bargaining in the maritime transport sector. The Czech Republic is the only country where trade unions are not involved in collective bargaining; this is because there are no sector-related collective agreements in force.

### Domain patterns

Only eight trade unions (around 9% of all the unions in the study) demarcate their domain in a way that is **congruent** with the sectoral definition. This suggests that statistical definitions of business activities of the sector differ from the lines along which employees identify their interests.

**Sectional overlap** is the most common domain pattern in the maritime transport sector. It occurs in 41% of cases (35 trade unions). This is often a result of domain demarcations that focus on certain categories of employees, who are then organised across several sectors, including in activities outside the maritime transport sector. Employee categories are specified by various parameters mostly related to employment status, such as white-collar workers (MMF in Denmark, SKL in Finland, FOMM-CGT in France, CMHF in the Netherlands), blue-collar workers (ABVV/BTB - FGTV/UBT in Belgium, 3F in Denmark, SIPTU in Ireland, SEKO in Sweden), or more specific groups such as ship and harbour workers (RMT in the UK). Several unions cover only the private sector (OMEPEGE-SEK in Cyprus, PASENT in Greece), public sector activities related to maritime transport (PSEU in Ireland) or certain regions (FTTUB in Bulgaria, ELA Zerbitzuak in Spain, OZZOiM in Poland, SPDS in Slovenia). In other cases, unions cover only some activities within the maritime transport sector such as freight transport (ŪTAF in Latvia), passenger maritime transport (GWU in Malta) or some specific ferry lines (EVG in Germany).

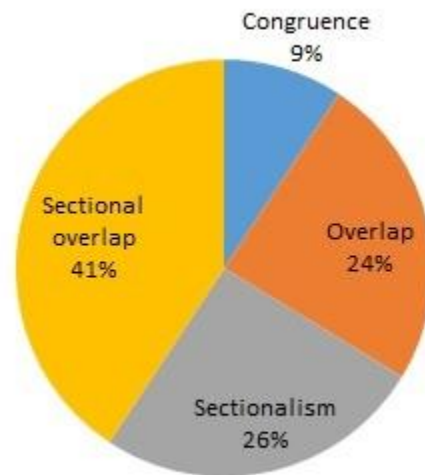
**Overlap** occurs in 24% of cases (21 trade unions). It is explained by two main modes of demarcation. The first, which affects only three trade unions, relates to general or cross-sectoral domains (CNV and FNV in the Netherlands and Unite in the UK). The second and more frequent mode in the sector relates to various forms of multi-sector domains. In some cases, the domain includes all services (Ver.di in Germany), the whole transport sector (FILT-CGIL in Italy, OGBL-ACAL and LCGB-Transport in Luxembourg), or diverse activities such as the whole transport sector, construction and gambling (SMC-UGT in Spain). In other cases, the domain is more restricted and closely related to the maritime transport sector or maritime sector, including activities such as warehousing and ports (EMSA in Estonia), ports (FNSM CGT in France), fishing (LJS in Lithuania) or inland water transport (OSN in the Czech Republic).

Finally, **sectionalism** is recorded in 26% of cases (22 trade unions) It is explained by domain demarcations that cover only some specific activities within the maritime transport sector such as maritime piloting (Luotsiliitto in Finland), or public sector activities related to maritime transport

(TEEU in Ireland), some activities only within some regions (STU in Bulgaria, KSM MiR NSZZ Solidarność in Poland), or some employee categories such as white-collar workers in the sector (SL in Denmark), pilots (Lotsförbundet in Sweden) or seamen workers (EMAÜ in Estonia, PNO in Greece).

The domain description of all the unions is presented in Table A3 in Annex 1.

*Figure 4: Maritime transport related trade unions and their domain patterns (N= 86)*



Source: Eurofound’s Network of European correspondents (2015).

### **Membership figures and organisational strength within the sector**

Membership of the sector-related trade unions is voluntary in the 25 countries that record trade unions. The number of active trade union members differs widely, ranging from 2,986 (SL in Denmark) to 288 (EMAÜ in Estonia). This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to recruit members. Therefore, density is a more appropriate measure of membership strength for comparative analysis. In this context, it should be noted that the density figures in this section refer to net ratios, which means they are calculated on the basis of active members (employees) only, rather than taking into consideration all union members (those who are in a job and those who are not). This is mainly because research usually considers net union densities more informative than gross densities, since the former measure tends to reflect unionisation trends among employees more quickly and accurately than the latter (only employees are capable of taking industrial action). When looking at sector density (again, referring only to active members), it is important to differentiate between the trade unions’ sectoral density and their domain density. The domain or overall density must be higher than the sectoral density if a trade union organises a particular part of the sector – that is, where the trade union’s membership domain is sectionalised – and equally if a trade union organises the whole sector as it is defined in the study, that is, where the trade union’s membership domain is congruent. In this study we look only at sectoral density.

Sectoral density rates are available for 36% of the sector-related organisations covered (31 out of 88 cases). However, some doubts arise about the sectoral density rates from Sweden and Slovenia

(eight trade unions), where the sum of all the density rates is higher than 100%. Bearing this inconsistency in mind, the statistical information summarised below does not include Sweden and Slovenia. Only 31 trade unions are therefore included.

Statistics show that:

- sectoral density exceeds 75% in only two of the trade unions (SPH in Croatia and MDU in Malta);
- three of the trade unions (10%) claim to represent between 50% and 75% of the sector’s employees (SMU in Finland, SIPTU in Ireland and FZZ MiR in Poland);
- nine (29%) of the trade unions claim to represent between 20% and 35% of the sector’s employees;
- six (19%) of the trade unions claim to represent between 10% and 20% of employees in the sector;
- 11 (35%) of the trade unions record a sector density rate of less than 10% of employees.

From these figures, it can be stated that low sectoral densities prevail in the sector since 84% of the organisations with available information record a density lower than 35%. However, these figures should be treated with caution due to the fact that more than a half of the trade unions do not record information on sectoral membership.

## Employer organisations

Tables A4 and A6 present membership data for the employer organisations in the maritime transport sector. Sectoral employer organisations were identified in 23 EU Member States (there are no sector-related employers' organisations in the Czech Republic or Latvia, while Austria, Hungary and Slovakia are not included in the study).

A total of 43 sector-related employer organisations were identified; 15 countries record only 1 employer organisation, 5 countries record 2 employer organisations, and 1 country has 3 (Table 5). The Netherlands and Italy, with 5 and 10 employer organisations respectively, indicate a very fragmented landscape. Most of the countries have a monopolistic or semi-pluralistic employer/business organisation landscape.

**Table 5: Number of employer/business organisations in the maritime transport sector per country**

Number of employer organisations	Countries
One	BE, BG, CY, DE, EE, ES, HR, LT, LU, MT, PL, PT, RO, SI, UK
Two	DK, EL, FI, IE, SE
Three	FR
Four or more	IT, NL

## Collective bargaining

The study found employer organisations that are involved in collective bargaining in 16 countries (Table A5 in Annex 1). In six countries (Estonia, Lithuania, Poland, Portugal, Slovenia and the UK), no sectoral employer association included in the study is involved in collective bargaining.

In the case of Malta, information about this was not available. In Sweden, one of the two employer associations included in the study is not involved in collective bargaining.

Generally, business organisations may also deal with interests other than those related to industrial relations. As explained in the Eurofound report, [Employers' organisations in Europe](#), organisations specialising in matters other than industrial relations are commonly defined as 'trade associations'. Bearing this in mind, it could be assumed that all the eight organisations not involved in collective bargaining (Table A5) either primarily or exclusively act as trade associations in their country. All these organisations are members of the sectoral European-level employer organisation, European Community Shipowners' Associations (ECSA). In this sense, it must be stressed that, according to the selection criteria described above, all national organisations affiliated to the European-level employer association are included in the study, irrespective of whether or not they are involved in collective bargaining.

## Domain patterns

With regard to the domain patterns of the employer organisations, **sectionalism** is the most widespread domain pattern. It occurs in 58% of the cases (25 organisations). It is caused by domain demarcations that cover only specific subsectors within the maritime transport sector, such as sea and coastal passenger water transport or sea and coastal freight water transport (BSA in Bulgaria, GASPE in France, and KVNR and Nemea in the Netherlands), service activities incidental to water transportation (SET in Finland and APERMA in France), or sea and coastal passenger water transport (SEEN in Greece). It is also caused by domain demarcations that exclude public-owned companies (KBRV-URAB in Belgium, Confitarma in Italy, OPOPC in Romania and SARF in Sweden), or cover only certain types of companies, such as large national companies (ZAP in Poland). Finally, in the case of GIZ-ZLS in Slovenia, it is due to the fact that the organisation is active in only one region.

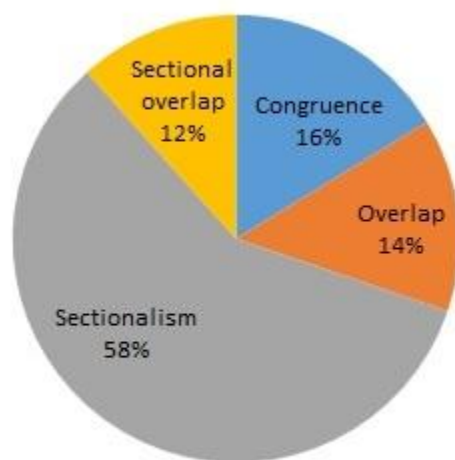
**Sectionalist overlap** occurs in 12% of the cases (five organisations). It is usually explained by domain demarcation that excludes some activities or subsectors within the maritime transport sector (such as coastal transport of passengers, or service activities incidental to water transportation) and covers other activities outside the sector, such as supporting services to ship operators (KNE-CSC in Cyprus), manufacturing industry combined with transport and service (DI in Denmark), logistics companies, warehouses and cold stores, freight villages and airport terminal operators (Assologica in Italy), or the education sector (LLSA in Lithuania).

Cases of **overlap**, which occur in 14% of the cases (six organisations), arise from employer organisations that have a cross-sectoral domain (Ibec in Ireland) or from organisations that cover sectors and activities outside, but closely related to, the maritime transport sector, such as offshore activities (Rederiforening in Denmark), maritime education and maritime law (ELL in Estonia), maritime tourism activities, management companies and vessels towing (AAMC in Portugal), or crewing agencies, maritime training providers, maritime colleges, classification societies, law firms, accountancy firms and banks (UK Chamber of Shipping in the UK).

Finally, 16% of the associations (seven in total) have a membership domain that is more or less **congruent** with the sector definition. This means the domain of these organisations largely focuses on the maritime transport sector as defined for the purpose of this study. More employer organisations than trade unions (9%) base their activities on the sectoral definition used in this study.



*Figure 5: Maritime transport related employer organisations/business associations and their domain patterns (N= 43)*



Source: Eurofound Network of European correspondents (2015).

### **Membership figures and organisational strength within the sector**

The first point to note is that membership of sector-related employer organisations is voluntary in all the countries that record employer organisations. Sectoral domain densities for companies are available for 37 organisations (88%). Statistics show that density is:

- between 35% and 55% in two cases (KVNOR in the Netherlands and KBRV-URAB in Belgium);
- between 15% and 25% in six cases;
- below 10% in 29 cases.

Sectoral domain densities for employees are available for 26 organisations (60%). Statistics show that density is:

- between 60% and 90% in five cases;
- between 30% and 45% in three cases;
- between 10% and 20% in two cases;
- below 10% in 16 cases.

Bearing these figures in mind, it can be stated that relatively low sectoral densities prevail both in terms of companies and employees.

Finally, it is worth noting that, where information is available for both kinds of densities (26 cases), the sectoral domain densities of companies are lower than the densities in terms of employees in 81% of the cases. This could indicate that larger companies have a higher propensity to associate than their smaller counterparts.

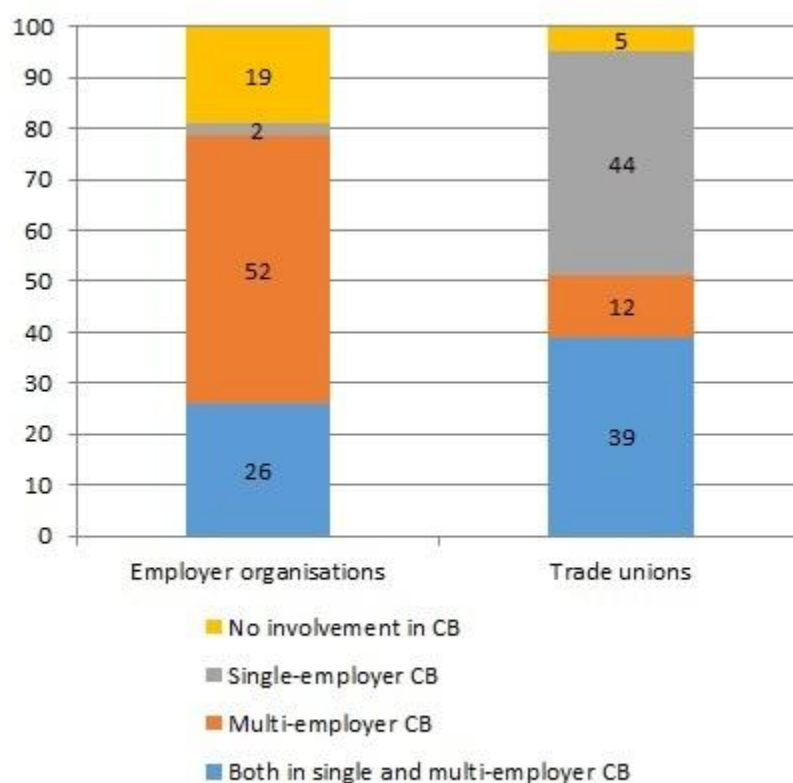
## Collective bargaining and its actors

Table A2 and A5 (Annex 1) lists all social partners engaged in sector-related collective bargaining. Figure 6 shows the involvement of the organisations in collective bargaining.

With regard to trade unions, 93% of sector-related trade unions with available information record participation in collective bargaining. 44% show participation in single-employer bargaining, 39% record participation in both single and multi-employer bargaining, and 12% record participation in multi-employer bargaining only.

With regard to the employer organisations 81% those with available information record participation in collective bargaining, 52% record participation in multi-employer bargaining, 26% in both single and multi-employer bargaining, and 2% in single-employer bargaining only (Ibec in Ireland).

*Figure 6: Involvement of organisations in different forms of collective bargaining (% of total organisations in the study)*



Source: Eurofound's Network of European correspondents (2015).

The data presented in Table 6 provide an overview of the system of sector-related collective bargaining in the 25 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 as described in the book [National labour relations in internationalised markets](#) by Traxler, Blaschke and Kittel. The sector's rate of collective bargaining coverage is therefore 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.

The table also shows the extent of multi-employer bargaining and whether statutory extension schemes (that widen the scope of collective agreements to non-affiliated employers) have been applied to the sector.

**Table 6: System of sectoral collective bargaining, 2015**

Country	CBC*	Share of MEB*	Extension practices <sup>a</sup>
BE	100%	100%	2
BG	na	0%	0
CY	na	MEB prevailing	1
CZ	na	0%	0
DE	25–30%	MEB prevailing	0
DK	85–90%	60%	0
EE	15.4%	0%	0
EL	na	na	1
ES	100% (binding arbitration)	SEB prevailing	2
FI	90%	80%	2
FR	100%	MEB prevailing	2
HR	80%	100%	1
IE	na	0%	0
IT	100%	MEB prevailing	1
LT	50%	0%	0
LU	100%	100%	2
LV	100%	0%	2
MT	na	0%	0
NL	90% (50% for Dutch workers)	MEB prevailing	2
PL	na	0%	2
PT	4.6%	33.7%	1 <sup>b</sup>
RO	0%	n/a	0 <sup>b</sup>
SE	95%	100%	2
SI	100%	0%	0
UK	38%	0%	0

*Notes: \* Estimates. CBC = collective bargaining coverage: employees covered by a collective agreement 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. <sup>a</sup> Extension practices: 0 = no practice; 1 = limited/exceptional; 2 = pervasive. Cases of functional equivalence are put in parenthesis. <sup>b</sup> Extension practices abolished or limited in 2011, 2012 or 2013. na = not available; n/a = not applicable.*

*Source: Eurofound's Network of European correspondents (2015).*

## **Collective bargaining coverage**

All the countries except Romania record some form of collective bargaining in the maritime transport sector. In Latvia, where no sector-related employer organisation that met the criteria to be included in the study was found, collective bargaining takes place only at the company level. In the Czech Republic, where no employer organisations were recorded, Czech employees in the sector are covered by company collective agreements concluded by foreign organisations. In Estonia, Lithuania, Poland, Slovenia and the UK, where no sectoral employer organisation is involved in collective bargaining, single-employer is the only bargaining level. In Portugal, the multi-employer agreement in force is a so-called *Acordo Colectivo de Trabalho*. Within the Portuguese industrial relations system, this type of agreement is signed by several companies together rather than by any employer organisation.

In a few of the countries where multi-employer is the only or most important bargaining level, multi-employer collective agreements are more or less congruent with the sectoral definition used in this study. Thus, they cover the whole sector or exclude only some activities such as service activities incidental to water transportation. This happens in Croatia, France, Germany and Italy.

In other countries, multi-employer collective agreements have a sectionalist domain and therefore cover only some activities such as sea freight water transport (Cyprus), or conclude different collective agreements for different subsectors such as passenger vessels and merchant vessels (Finland). A particular case of fragmented collective bargaining appears in the Netherlands. In this country, different collective agreements are concluded for freight water transport and passenger water transport. In addition, there are collective agreements specifically concluded for foreign employees from countries such as Indonesia or the Philippines. In addition, service activities incidental to water transportation are negotiated at single-employer bargaining level. Finally, in other countries, such as Denmark, multi-employer agreements have an overlap domain, also covering land transport.

The sector's collective bargaining coverage rate is available for 17 countries ( Table 7).

Generally, high collective bargaining coverage rates prevail in the countries with available data, with 12 countries recording collective bargaining coverage exceeding 80%. These countries are Belgium, Croatia, Denmark, Finland, France, Italy, Latvia, Luxembourg, the Netherlands, Slovenia, Spain and Sweden. A second minor group is identified, with three countries that record collective bargaining coverage rates between 30% and 50%. These countries are Germany, Lithuania and the UK. Finally, a third group of only two countries (Estonia and Portugal) record collective bargaining coverage rates lower than 20%.

**Table 7: Collective bargaining coverage and collective bargaining level, 2013**

	<b>&gt;80% coverage</b>	<b>Between 30% and 50% coverage</b>	<b>Below 20% coverage</b>	<b>0% coverage</b>	<b>Data not available</b>
<b>Multi-employer collective bargaining</b>	BE, HR, LU, SE				
<b>Both single- and multi-employer collective bargaining</b>	DK, FI, FR, IT, NL, ES	DE	PT		
<b>Single-employer collective bargaining</b>	LV, SI,	LT, UK	EE		
<b>No collective agreements</b>				RO	
<b>Not available</b>					BG, CY, CZ, EL, IE, MT, PL

*Source: Eurofound's Network of European correspondents (2014).*

With the exception of Latvia and Slovenia, in all the countries that record high collective bargaining coverage rates exceeding 80%, multi-employer is the only or most important bargaining level. Attention should also be drawn to the Spanish case. This country, where single-employer is the predominant bargaining level, has a collective bargaining coverage close to 100% due to the existence of a binding arbitration (Laudo Arbitral), approved in 2005, that regulates professional structure, wage structure, vocational training and disciplinary regimes.

### **Participation in public policy**

Interest associations may influence public policy in two ways:

- they may be consulted by the authorities on matters affecting their members;
- they may be represented on 'corporatist' (in other words tripartite) committees and policy consultation boards.

This study considers only cases of consultation and corporatist participation that explicitly relate to sector-specific matters. Consultation processes can be wide-ranging and, therefore, the organisations consulted by the authorities may vary according to issues and also depend on changes in government. Moreover, consultation may be occasional rather than regular.

### **Trade unions or interest representations**

Of the 73 sector-related trade unions with available data, 55 (75%) are consulted. Authorities consult unions in all the countries in which there are sector-related unions except Slovenia; 23 trade unions are consulted on a regular basis in the following countries: Belgium, Bulgaria, Croatia, Cyprus, Finland, Germany, Italy, Latvia, the Netherlands, Poland, Portugal, Romania, Sweden and the UK. Information was not available for Luxembourg.

Since 21 of the 25 countries covered in the study have a multi-union system, it cannot be ruled out that the authorities favour certain trade unions over others or that unions compete for participation rights. In Bulgaria, France, Germany, Greece, Ireland, Latvia, the Netherlands, Spain and the UK only some of the sector-related trade unions are consulted.

### **Employer organisations or business associations**

Authorities consult 34 of the 39 (87%) employer organisations for which information is available. Employer organisations are consulted by the government in all the countries with sector-related organisations (information was not available in Spain or Ireland); 17 organisations are regularly consulted in the following countries: Belgium, Bulgaria, Croatia, Cyprus, Finland, Greece, Italy, the Netherlands and Sweden.

Of the eight countries with a multi-organisation system where a practice of consultation is recorded, all existing employer organisations may take part in the consultation process in Denmark, Finland, France and Sweden. In contrast, in Greece and the Netherlands, only some of the existing employer organisations take part in the consultation process. In Ireland and Italy, information was not available for all or some of the organisations.

### **Tripartite participation**

The findings reveal that genuine sector-specific bodies have been established in 15 of the 25 countries under consideration (Table 8). Sector-specific bodies, whether bipartite or tripartite, have been established in Belgium, Bulgaria, Croatia, Denmark, Estonia, Finland, France, Germany, Ireland, Italy, Latvia, the Netherlands, Poland, Sweden and the UK. Moreover, in several countries there are several bodies.

With regard to the scope of activity of the tripartite and bipartite bodies, there are bodies dealing with assistance and insurance (Belgium and Croatia), general maritime policy and regulation (Bulgaria, Estonia, Finland and France), training and education (Denmark, France, Germany, the Netherlands and the UK), health and safety in the workplace (Denmark, France, Ireland, the Netherlands, Sweden and the UK), social insurance (France, Italy and the Netherlands), pensions (the Netherlands and the UK), maritime security policies (UK) and general social dialogue issues related to the maritime transport sector (Poland).

**Table 8: Tripartite and bipartite sector-specific public policy boards, 2015**

	<b>Name of body and scope of activity</b>	<b>Bipartite or tripartite</b>	<b>Origin</b>	<b>Trade unions participating</b>	<b>Employer organisations participating</b>
<b>BE</b>	Assistance and provident Fund	Bipartite	Statutory	ABVV/BTB - FGTB/UBT, ACV/CSC Transcom, CGSLB/ACLVB	KBRV
	Technical Committee for the Merchant Navy	Bipartite	Statutory	ABVV/BTB - FGTB/UBT, ACV/CSC Transcom, CGSLB/ACLVB	KBRV
<b>BU</b>	Sectoral Council for Tripartite Cooperation, Ministry of Transport, Information Technology and Communications (MTITC)	Tripartite	Statutory	CITUB, CL Podkrepa	BIA
	Sub-sectoral Council for Tripartite Cooperation in Water Transport, MTITC	Tripartite	Statutory	CITUB, CL Podkrepa	CEIBG; BIA
<b>DE</b>	Maritime Alliance for Training and Employment	Tripartite; Federal and regional ministries of transport and ministries of education/culture	Joint statement	Ver.di	VDR
<b>DK</b>	Vocational Training Committee of the Transport Sector – warehousing and storage	Tripartite	Statutory	3F	DI, Danish Chamber of Commerce, Copenhagen Malmö Ports
	Education Council of the Metal Industry	Tripartite	Statutory	3F, Dansk Metal	DI

	<b>Name of body and scope of activity</b>	<b>Bipartite or tripartite</b>	<b>Origin</b>	<b>Trade unions participating</b>	<b>Employer organisations participating</b>
<b>DK</b>	Education Council of Maritime Education	Tripartite	Statutory	3F, SL, MMF, CO-SEA	Danish Maritime Authority, Danish Shipowners' Association, DI, Danmarks Fiskerifoening
	Sea Health	Bipartite	Agreement	3F, SL, MMF, Metal Søfart, HK Danmark	Rederiforening, Bilfærgernes, HORESTA, Statsskibene
<b>EE</b>	Maritime Council	Tripartite	Agreement	EMSA	ELL
<b>FI</b>	Advisory Board for the Maritime Sector – maritime policy	Tripartite	Statutory	Transport Workers' Union, SMU, SLPL, SKL	Confederation of Finnish Industries (EK), SV, Finnish Forest Industries Federation, Finish Port Operators' Association, SET, Technology Industries
	Consultative Committee on Seafaring – assists in the legislative development of issues related to seafarers' employment and social conditions	Tripartite	Statutory	SKL, SLPL	SV, SET
<b>FR</b>	OPCA – professional training	Bipartite	By law and agreement	FNPD-CGT, CFE-CGC, FEETS-FO, CFDT, CFTC, PSCN CFE-CGC	Armateurs de France, French Ports Organisation (UPF), National Association of French Seaport Terminal Operators (UNIM)
	Consultative body that supports governments to regulate the sector	Tripartite	By law	CGT, FO, CFDT, CFTC, CFE-CGC	Armateurs de France, UPF, UNIM



<b>FR</b>	Consultative body on health and safety and working conditions of seafarers	Tripartite	By law	CGT, FO, CFDT, CFTC, CFE-CGC	Armateurs de France
	Consultative body in charge of professional training in maritime transport	Tripartite	By law	CGT, FO, CFDT, CFTC, CFE-CGC	Armateurs de France
	Tripartite body for collective agreements covering seafarers	Tripartite	Agreement	CGT, FO, CFDT, CFTC, CFE-CGC	Armateurs de France
	Humanis – collective health insurance	Bipartite	Agreement	CGT, FO, CFDT, CFTC, CFE-CGC	Armateurs de France
<b>HR</b>	Permanent tripartite body for helping maritime officers and seafarers in accidents abroad	Tripartite	Agreement	SPH	CSA Mare nostrum
	Permanent tripartite body for giving opinions on obtaining permission for armed guards to board ships under the Croatian flag	Tripartite	Agreement	SPH	CSA Mare nostrum
<b>IE</b>	Health and Safety Authority Code of Practice on Dock Work	Tripartite		SIPTU International Transport Workers' Federation, Irish Congress of Trade Unions	Harbour Masters' Committee, Dublin Port Company, Burke Shipping Group
<b>IT</b>	National Social Security Fund for maritime employees	Bipartite	Agreement	FILT-CGIL, FIT-CSL, UIL Trasporti - UIL	Confitarma, Fedarlinea
	SANIMARE. Paritarian institution of the maritime sector	Bipartite	Agreement	FILT-CGIL, FIT-CSL, UIL Trasporti - UIL	Confitarma, Fedarlinea, Federimorchiatori
	Ports National Paritarian Institution	Bipartite	Agreement	FILT-CGIL, FIT-CSL, UIL Trasporti - UIL	Assoporti, Assiterminal, Assologistica, Fise-Uniport

<b>LV</b>	National Tripartite Cooperation Council (NTSP) transportation sub-council	Tripartite	Statutory	Free Trade Union Confederation of Latvia	LDDK
<b>NL</b>	Opleidings- en Ontwikkelingsfonds Zeescheepvaart – education and training	Bipartite	Agreement	NINL	VWH, SMW
	Sectorraad Koopvaardij – interest representation in social insurances	Bipartite	Agreement	NINL	KVNR
	Stichting Zee-risico 1996 – health and safety	Bipartite	Agreement	NINL	KVNR
	Vereniging Zee-risico 1967 – social insurance for non-Dutch seafaring personnel	Bipartite	Statutory	NINL	KVNR
	Bedrijfspensioenfonds voor de Koopvaardij – pensions	Bipartite	Agreement	NINL	KVNR
	Various working groups on, for example, safety inspections, sustainable employment, education and training, health and safety, national legislation, international legislation	Bipartite/ tripartite	Various	NINL	KVNR

<b>PL</b>	Tripartite Team for Shipping and Sea Fishing (TTSSF) – to conduct tripartite sectoral social dialogue for reconciliation of its parties’ interests and solving of problems related to operation of shipping and sea fishing.	Tripartite	Agreement	KSM MiR NSZZ Solidarność, FZZ MiR, OZZOiM	ZAP
<b>SE</b>	Maritime Joint Work Environment Council (SAN) – works to improve and promote occupational health and safety at sea.	Bipartite	Agreement (since 1956).	SEKO, SBF	SARF
<b>UK</b>	Maritime Educational Foundation /Maritime Training Trust – training	Bipartite	Agreement	Nautilus, RMT	UK Chamber of Shipping
	Trustee boards of the Merchant Navy Officers Pension Fund (MNOFP) and Merchant Navy Officers Pension Plan (MNOPP) and the Joint Officers Pensions Committee, which oversees the governance of the MNOFP and MNOPP occupational pension schemes	Bipartite	Agreement	Nautilus	UK Chamber of Shipping
	Trustee boards of the Merchant Navy Ratings Pension Fund and Merchant Navy Ratings Pension Plan – occupational pension schemes	Bipartite	Agreement	RMT	UK Chamber of Shipping

<b>UK</b>	Merchant Navy Training Board – sector-specific education, training and skills	Bipartite (plus education sector representatives , and government observer)	Agreement	Nautilus, RMT	UK Chamber of Shipping
	Merchant Navy Welfare Board Council – welfare/charitable services	Bipartite (plus voluntary sector representatives )	Agreement	Nautilus, RMT	UK Chamber of Shipping
	National Maritime Occupational Health and Safety Committee – health and safety promotion	Bipartite	Agreement	Nautilus, RMT	UK Chamber of Shipping
	National Maritime Security Committee – consultative forum on maritime security policies	Tripartite	Statutory	Nautilus, RMT	UK Chamber of Shipping
	Tripartite Working Group on UK implementation of the International Labour Organization Maritime Labour Convention	Tripartite	Statutory	Nautilus, RMT, Unite	UK Chamber of Shipping
	Warlike Operations Area Committee (WOAC) – body that designates areas at risk from war and piracy	Bipartite	Agreement	Nautilus, RMT	UK Chamber of Shipping

Source: Eurofound's Network of European correspondents (2015).

## European level of interest representation

At European level, eligibility for consultation and participation in social dialogue is linked to three criteria laid down in [Commission Decision 98/500/EC](#). Accordingly, social partner organisations must:

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

In terms of social dialogue, the essential feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. This section about European associations in the maritime transport sector therefore analyses these organisations' membership domains, the composition of their membership and their capacity to negotiate.

As detailed below, one sector-related European association on the employee side (ETF) and one on the employer side (ECSA) are members of the European Social Dialogue Committee of the maritime transport sector and are listed by the European Commission as social partner organisations consulted under Article 154 of the TFEU. Hence, the following analysis will concentrate on these organisations.

### Membership domain

According to its website, ETF represents more than 3.5 million transport workers from more than 230 transport unions and 41 European countries, in the following sectors: railways, road transport and logistics, maritime transport, inland waterways, civil aviation, ports and docks, tourism and fisheries. Its principal activity is to represent and defend the interests of transport workers throughout Europe. It formulates and coordinates trade union transport and social policy, organises concerted industrial activities, engages in education and training, and conducts innovative research on a variety of subjects from workers' health and safety to employment impact studies.

ECSA is the trade association representing the national shipowners' associations of the EU and Norway. According to its website, ECSA represents close to 99% of the European Economic Area fleet or about 20% of the world fleet. Its aim is to promote the interests of European shipping so that the industry can best serve European and international trade and commerce in a competitive, free-enterprise environment to the benefit of shippers and consumers, and help formulate EU policy on critical maritime transport related issues.

### Membership composition

Table 9 lists membership-related trade unions affiliated to ETF, drawn from the country reports. This membership list is confined to the sector-related associations of the countries under consideration; hence it does not include trade unions affiliated to ETF that do not have any members in the maritime transport sector.

The membership of ETF is obtained through the membership list provided by the organisation and a further check of the membership lists published on the organisation's website.

**Table 9: Maritime transport trade unions affiliated to ETF**

Country	Trade union organisation	Collective bargaining*	Geographical coverage
<b>BE</b>	ACV/CSC Transcom	M + S	Whole country
	ABVV-BTB/FGTB-UBT	M + S	Whole country
	CGSLB/ACLVB	M + S	Whole country
	BBTK/SETCa	M + S	Whole country
<b>BG</b>	FTW Podkrepa	S	Information not available
	FTTUB	M + S	Only Varna region
	STU	S	Only Varna region
<b>CY</b>	OMEPEGE-SEK	M + S	Whole country
<b>CZ</b>	OSN	No	Whole country
<b>DE</b>	Ver.di	M + S	Whole country
<b>DK</b>	3F	M + S	Whole country
	CO-SEA	M + S	Whole country
	SL	M + S	Whole country
<b>EE</b>	EMSA	S	Whole country
	EMAÜ	M + S	Whole country
<b>EL</b>	PNO	M	Whole country
<b>ES</b>	SMC-UGT	M + S	Whole country
	FSC-CCOO	M + S	Whole country
	ELA Zerbitzuak	na	Only the Autonomous Community of the Basque Country
<b>FI</b>	SKL	M + S	Whole country
	SLPL (FSOU)	M + S	Whole country
	SMU	M + S	Whole country
<b>FR</b>	CFTC Transports	M + S	Whole country
	FOMM-CGT	M + S	Whole country
	FNSM CGT	M + S	Whole country
	FGTE-CFDT	M + S	Whole country
	FEETS-FO	M + S	Whole country
<b>HR</b>	SPH	M	Whole country
<b>IE</b>	SITPU	S	Whole country

Country	Trade union organisation	Collective bargaining*	Geographical coverage
IT	FILT-CGIL	M + S	Whole country
	FIT-CISL	M + S	Whole country
	UILTrasporti	M + S	Whole country
LT	LJS	S	Whole country
LU	LCGB-Transport	M	Whole country
	OGBL-ACAL	M	Whole country
LV	LTFJA	No	Whole country
	ŪTAF	S	Whole country
MT	GWU	S	Whole country
NL	CNV	S	Whole country
	FNV	S	Whole country
	NINL/Nautilus	M + S	Whole country
PL	KSM MiR NSZZ Solidarność	S	In Pomerania and West Pomerania regions
	OZZOiM	S	In Pomerania and West Pomerania regions
	FZZ MiR	S	In Pomorskie and Zachodniopomorskie regions
PT	OFICIAISMAR	No	Whole country
RO	SLN	M + S	Whole country
SE	SBF	M	Whole country
	SEKO	M	Whole country
	Unionen	M	Whole country
SI	SŽPD	S	Only in the Coast–Karst region
	SPS	S	Only in the Coast–Karst region
UK	Nautilus	S	Whole country
	RMT	S	Whole country
	Unite	S	Whole country
	Prospect	S	Whole country
	TSSA	S	Whole country

*Note: \* Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining.*

*Source: Eurofound's Network of European correspondents (2015).*

In each of the 25 countries covered in this study, at least one sectoral affiliation to ETF was found. ETF has 56 direct affiliations from the 25 countries under consideration. Therefore, 64% of the trade unions listed in Tables A1 and A2 are directly affiliated to ETF. Attention should be drawn to the case of Dansk Metal in Denmark, which, although it is a member of ETF, is not included as a separate organisation because it is a member of the trade union CO-SEA, also included in Table 7. The trade unions FNV from the Netherlands and TSSA from the UK are not affiliated to the maritime ETF section although, according to the national contributions, they have members in the sector and are involved in sector-related collective bargaining.

A total of 50 of the 56 trade unions affiliated to ETF are involved in sector-related collective bargaining. OSN in the Czech Republic, LTFJA in Latvia and OFICIAISMAR in Portugal are not involved. Information about ELA Zerbitzuak in Spain was not available.

All the unions affiliated to ETF cover the sector in all the regions of their countries except FTTUB and STU in Bulgaria, ELA Zerbitzuak in Spain, KSM MiR NSZZ Solidarność, OZZOiM and FZZ MiR in Poland, and SŽPD and SPS in Slovenia.

Although the coverage of organisations recorded by ETF in the maritime transport sector may seem relatively low at first glance (64%), a comparison with European trade unions present in other sectoral social dialogue committees (see representativeness studies on construction – 62%, woodworking – 55%, chemicals – 57%, or textile and clothing – 62%) reveals that it is in fact close to or higher than the average. In this context, it is important to check whether some major national trade unions are not affiliated to ETF. For this purpose, it can be assumed that major trade unions are those that are active in the whole country, conduct collective bargaining, have a relatively high level of membership, and have opportunities to intervene in the national decision-making process.

The analysis of the organisations that are not affiliated to ETF reveals 32 unaffiliated trade unions in 15 countries that are involved in collective bargaining. Of these, 19 are exclusively involved in single-employer bargaining. All these trade unions cover the whole country except for Sindicato XXI in Portugal and the trade unions in Slovenia that are active only in the coast regions. Of these 32 trade unions, 11 are also consulted by public authorities on issues affecting the sector. Sectoral density rates are available for only 7 of these 11 trade unions that are consulted by public authorities, involved in collective bargaining and active in the whole country. Only one of these records a density higher than 11%: MDU in Malta (75%). This trade union could therefore be considered a major trade union not affiliated to ETF.

Table 10 lists the employer organisations that are members of ECSA. Again, this membership list is confined to the sector-related associations of the countries under consideration; hence it does not include employer organisations affiliated to ECSA that do not have any members in the maritime transport sector.



**Table 10: Maritime transport employer organisations affiliated to ECSA, 2015**

Country	Employer organisation	Collective bargaining*	Geographical coverage
BE	KBRV-URAB	M	Whole country
CY	KNE-CSC	M	Whole country
DE	VDR	M	Whole country
DK	Rederiforening	M+S	Whole country
EE	ELL	No	Whole country
EL	UGS	M	Whole country
ES	ANAVE	M	Whole country
FI	SV	M	Whole country
FR	Armateurs de France	M	Whole country
HR	CSA Mare Nostrum	M	Whole country
IE	ICS	No	Whole country
IT	Confitarma	M+S	Whole country
	Fedarlinea	M+S	Whole country
LT	LLSA	No	Whole country
LU	Fedil Shipping	M	Whole country
MT	MISC	na	Whole country
NL	KVNR	M	Whole country
PL	ZAP	No	Only in Pomerania, West Pomerania and Masovia regions
PT	AAMC	No	Whole country
SE	SRF	No	Whole country
SI	GIZ-ZLS	No	Only the Coast--Karst region
UK	UK Chamber of Shipping	No	Whole country

Notes: \* Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining. na = information not available.

Source: Eurofound's Network of European correspondents (2015).

ECSA has 22 sectoral affiliations in 21 countries; there are two sectoral affiliations in Italy. This means 51% of the employer organisations listed in Tables A4 and A5 are directly affiliated to ECSA. As previously explained, there are no sector-related employer organisations in the Czech Republic and Latvia, while Austria, Hungary and Slovakia are not included in the study.

The two countries in which there is no sectoral affiliation to ECSA are Bulgaria and Romania. In Bulgaria, the sector-related employer organisation BSA was affiliated to ESCA in the period 2007–2012 and then cancelled its affiliation.

It is also worth noting the case of Cyprus. Although, the employer organisation affiliated to ECSA in this country is the Joint Cyprus Shipowners' Association, information provided by Eurofound's national correspondent related to its sister organisation that is involved in sectoral collective bargaining – the Cyprus Shipping Chamber (KNE-CSC). Thus, the Cypriot organisation included in the study is indirectly affiliated to ECSA.

A total of 14 of the 22 employer organisations affiliated to ECSA are involved in sectoral collective bargaining. All the employer organisations affiliated to ECSA, apart from ZAP in Poland and GIZ-ZLS in Slovenia, cover the sector in all regions of their countries.

Again, although coverage of organisations recorded by ECSA in the maritime transport sector (51%) may seem relatively low at first glance, comparison with European employer organisations in other sectoral social dialogue committees – see representativeness studies on woodworking (38%), electricity (62%), chemical (32%) and textile and clothing (48%) – reveals that it is close to or higher than average.

It is necessary to check whether some important employer organisations are not covered by ECSA. For this purpose, it can be assumed that important employer organisations are those that are active in the whole country, conduct collective bargaining, have a relatively high level of membership, and opportunities to intervene in the national decision-making process.

This analysis reveals that there are 21 organisations not covered by ECSA that are party to collective bargaining, of which only one is exclusively involved in single-employer collective bargaining (Ibec in Ireland). These 21 organisations are present in nine countries. Attention should be drawn to the fact that eight of these organisations are in Italy, four in the Netherlands and two in France. Thus, in these countries with a pluralistic or semi-pluralistic employer organisation system, some of the employer organisations involved in collective bargaining are not members of ECSA; 15 of these 21 organisations are consulted by public authorities in sector-related issues, and all but three (BSA in Bulgaria, Assoport in Italy, and OPOPC in Romania) are active in the whole country.

Sectoral density rates in terms of companies are available for 13 of the 15 employer organisations that are active in the whole country, involved in sector-related collective bargaining and consulted by public authorities in sector-related issues. All these organisations record a sectoral density lower than 10% except DI in Denmark, which records a density equal to 19%.

Sectoral density rates in terms of employees are available for nine of the 15 employer organisations that are active in the whole country, involved in sector-related collective bargaining and consulted by public authorities in sector-related issues. All these organisations record a sectoral density lower than 10% except Assiterminal in Italy, which records a density equal to 16%.

Bearing this in mind, it can be assumed that only two employer organisations, namely DI in Denmark and Assiterminal in Italy, can be considered major employer organisations not covered by ECSA.

## **Capacity to negotiate**

The European sectoral social partners should be able to prove their capacity to negotiate on behalf of their members and to enter into 'contractual relations, including agreements' (Article 155 of the TFEU), that is, the capacity to commit themselves and their national affiliates. This criterion refers to the capacity to negotiate agreements as provided for in Article 155 of the TFEU; negotiating other types of joint texts such as joint opinions, frameworks of action and guidelines is not considered to be sufficient in this context.

A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate in accordance with a given mandating procedure. The mandate/mandating procedure can be either statutory, that is, laid

down in the statutes (constitution) of the organisation or annexed to them, or non-statutory, that is, laid down in secondary (formal) documents, such as rules of procedures, memoranda of understanding or decisions by the governing bodies of the organisation. The mandate will be described in terms of the conditions and procedure for the organisation to be given the authorisation to enter into a specific negotiation, as well as for the ratification of a possible agreement. If no such formal mandating procedure can be identified, it should be considered that this condition is not fulfilled.

To check this criterion, European social partners from the maritime transport sector (that is, ETF and ECSA) were asked to provide proof of their statutes or any other written documentation describing their mandate and capacity to negotiate, as well as the ratification procedures in place.

### **ETF's capacity to negotiate**

According to the ETF constitution, rule VI, point 13, which applies to all ETF sections (civil aviation, fisheries, inland waterways, maritime transport, ports, railways and road transport), the ETF Executive Committee, which is the governing body of the ETF between congresses 'shall decide the guidelines governing the procedure for negotiations and agreements between social partners in the EU'. Furthermore, it states that these guidelines 'shall be subject to ratification by the affiliated organisations from EU countries represented at Congress'.

Moreover, the relevant ETF section, which is the ETF institution each affiliated union has the right to participate in to the extent that it represents workers from the sector concerned, adopts a negotiation mandate and strategy. The section president, who is a member of the Executive Committee, informs the Executive Committee regularly about the progress of negotiations and the final results. In practice, it is the relevant section that ratifies such possible agreements.

The ETF has concluded the following social partner agreements in the maritime transport sector:

- Agreement on the organisation of working time of seafarers, dated 30 September 1998;
- Agreement on the Maritime Labour Convention, dated 19 May 2008.

Bearing this in mind, it can be concluded that ETF has a statutory mandating procedure that indicates that the Executive Committee establishes the guidelines governing the procedure for negotiation, and that the relevant ETF Section sets up the negotiation mandate and strategy. This procedure has been used in the past by the maritime transport section to negotiate and conclude agreements as provided for in Article 155 of the TFEU.

### **ECSA's capacity to negotiate**

ECSA's legal statutes do not explicitly refer to a mandate/mandating procedure to negotiate agreements as provided for in Article 155 of the TFEU. Moreover, the negotiation of agreements as per Article 155 of the TFEU is not explicitly mentioned in the goals of the organisation, which include:

*to study all problems relating to the maritime transport industry in the context of the Treaties governing the European Union, to keep its members informed and to seek a common position, to promote its policies with the authorities of the European Union and to defend within the European Union the common interests of the maritime transport industries of the Member States.*

(Article 2)

Based on this, it cannot be stated that ECSA has a statutory mandate/mandating procedure. However, the organisation has concluded with ETF the two agreements previously mentioned. Therefore, the existence of a non-statutory mandating procedure cannot be ruled out.

## **Other European organisations**

As final proof of the weight of ETF and ECSA in the sector, it is useful to look at the other European organisations to which the sector-related trade unions and employer organisations are affiliated.

## **Employee organisations**

The affiliations of the trade unions are listed in Table A2 (Annex 1). There is one sector-related European organisation other than ETF that covers at least three countries. According to the bottom-up approach, the International Federation of Shipmasters' Associations (IFSMA) is present in five countries: Denmark, Finland, Italy, the Netherlands and the UK. It is worth noting that the bottom-up approach can be expected to underestimate the number of organisations affiliated to IFSMA. According to the information provided on its website, IFSMA is formed of around 11,000 shipmasters from 60 countries, either through their national associations or as individual members. However, information about the organisations affiliated and the European country members is not provided.

However, the following non-sector-related European social partners were found in Denmark, Sweden and the UK:

- European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT);
- European Public Service Union (EPSU);
- Public Services International (PSI).

The presence of these organisations reflects the overlapping domains of many trade unions in these countries, because these organisations do not claim to attract unions belonging to the maritime transport sector.

Thus, the only relevant competitor identified on the employee side is IFSMA. However, this organisation covers only shipmasters while ETF has a wider domain, representing all kinds of maritime transport workers.

## **Employer organisations**

A similar review of the membership of the national employer/business associations can be derived from Table A5. In this case, there are three organisations that were found in at least three countries:

- the International Chamber of Shipping (ICS), which is present in Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Portugal, Spain, Sweden and the UK;
- the Baltic and International Maritime Council (BIMCO), which is present in Cyprus, Germany and Italy;
- the Federation of European Private Port Operators (FEPORT), which is present in Denmark, Italy and Romania.

However, it should be noted that this is only the outcome of the bottom-up approach. Indeed, BIMCO has more than 2,200 members globally, including individual companies (information on employer associations/country members is not provided) and FEPORT, which is not sector-related, has members in 11 EU Member States. As far as ICS is concerned, the bottom-up approach found the same number of European employer organisations as listed on the ICS

website, that is, 14 employer/trade associations active in 14 Member States. All the European employer organisations affiliated to ICS are also affiliated to ECSA. Indeed, ICS and ECSA tend to cooperate. ICS participates in ECSA meetings to discuss EU-related issues with a link to the International Maritime Organization (IMO) and the International Labour Organization.

Similarly, ECSA attends ICS meetings to brief ICS members, primarily the non-EU member-associations, of EU-related issues with a link to the IMO.

## Conclusions

On the employee side, this representativeness study identified 88 trade unions in the maritime transport sector. A pluralistic structure exists in most of the 25 Member States. Moreover, the union landscape is very fragmented in some countries such as France (nine trade unions), Ireland (six trade unions), the Netherlands (five trade unions), Portugal (six trade unions), Slovenia (six trade unions), and Spain and the UK (five trade unions each).

On the employer side, 43 sector-related employers' organisations were identified. Unlike the trade union system, the employer/business organisation landscape in most of the countries is monopolistic or semi-pluralistic. Only the Netherlands (five employer organisations) and Italy (10 employer organisations) show a very fragmented landscape.

All the countries included in the study record trade unions, while there are no employer organisations in the Czech Republic or Latvia. However, in these two countries some workers are covered by collective bargaining. In Latvia, collective bargaining takes place only at the company level, while in the Czech Republic, employees in the sector are covered by company collective agreements concluded by foreign organisations.

The domain demarcation of both trade unions and employer organisations shows that employer/business organisations (16%) more often than trade unions (9%) cover the maritime transport sector as defined for the purpose of this study. However, this lack of congruence is low in both cases. Attention should also be drawn to the fact that the domain of the employer organisations tends to be narrower than the domain of the trade unions. The most widespread domain pattern for the employer/business organisations is sectionalism (58%). This is usually caused by domain demarcations that cover only specific subsectors within the maritime transport sector, such as sea and coastal passenger water transport or sea and coastal freight water transport. In the case of trade unions, the most common domain pattern is sectional overlap (41%), usually derived from domain demarcations that focus on certain categories of employee, who are then organised across several sectors, including activities outside the maritime transport sector.

Trade unions in the study record relatively low sectoral densities; 84% of the unions with available information record a sectoral density lower than 35%, while 35% record a density lower than 10%. Low sectoral densities also prevail among employer organisations, although it is worth noting that the sectoral domain densities of companies are lower than the densities in terms of employees in most cases. This could indicate that larger companies have a higher propensity to associate than their smaller counterparts.

The sector rate of collective bargaining coverage is high in most of the countries with available data (17 countries), with 12 countries record collective bargaining coverage exceeding 80%. These countries are Belgium, Croatia, Denmark, Finland, France, Italy, Latvia, Luxembourg, the Netherlands, Slovenia, Spain and Sweden. A second minor group of three countries record collective bargaining coverage rates between 30% and 50%. These countries are Germany, Lithuania and the UK. Finally, a group of only two countries (Estonia and Portugal) record collective bargaining coverage rates lower than 20%.

More employer organisations (87%) than trade unions (75%) are consulted by national governments in sector-related issues, while genuine sector-specific bodies, whether bipartite or tripartite, have been established in 15 of the 25 countries under consideration.

Top-down and bottom-up analyses of the maritime transport sector in the 25 EU Member States covered in the study reveal that ETF and ECSA are the most important European-level social partner organisations in the sector based on their membership. ETF has 56 direct affiliations (64% of all the trade unions identified) from the 25 countries under consideration, and 52 of these are involved in sector-related collective bargaining. The analysis of the organisations not covered by ETF reveals that there are 32 trade unions not covered in 15 countries that are involved in

collective bargaining, of which 11 are also consulted by public authorities in issues affecting the sector. Only one of these organisations records a density higher than 11%: MDU in Malta (75%). This trade union could be considered the only major trade union not affiliated to ETF.

ECSA has 22 direct affiliations (51% of all the employer/business organisations identified) in 21 countries, and 14 of these are involved in sector-related collective bargaining. There are 21 organisations not covered by ECSA in nine countries that are party to collective bargaining. Thus, in these nine countries with a pluralistic or semi-pluralistic employer organisation system, some of the organisations involved in collective bargaining are not members of ECSA. A total of 15 of these 21 organisations are consulted by public authorities in sector-related issues. Of these organisations, only two, DI in Denmark and Assiterminal in Italy, record a sectoral density in terms of companies (DI) or employees (Assiterminal) higher than 10%. Therefore, they can be considered major employer/business organisations not affiliated to ECSA.

Analyses of the legal statutes of both organisations reveals that ETF has a statutory mandating procedure to negotiate, on behalf of its members, agreements as per Article TFEU 155. ECSA does not have a statutory mandate/mandating procedure to negotiate such agreements on behalf of its members, but it has concluded two agreements with ETF as per Article 155 of the TFEU in the past.

## Annex 1: Data tables

### Trade unions

**Table A1: Domain coverage and membership of trade unions in the maritime transport sector, 2015**

	Trade union	Domain coverage*	Type of membership	Active members total	Active members in the sector
<b>BE</b>	ABVV/BTB - FGTV/UBT	SO	Voluntary	45,000	1,000
	ACV/CSC Transcom	O	Voluntary	1,500,000	250
	CGSLB/ACLVB	O	Voluntary	na	na
	BBTK-SETCa	SO	Voluntary	425,422	na
<b>BG</b>	FTTUB	SO	Voluntary	10,000	na
	FTW Podkrepa	SO	Mixed	5,500	na
	STU	S	Voluntary	958	958
<b>CY</b>	OMEPEGE-SEK	SO	Voluntary	na	na
	SEGDAMELIN-PEO	SO	Voluntary	7,700	50
<b>CZ</b>	OSN	O	Voluntary	187	na
<b>DE</b>	Ver.di	O	Voluntary	2,039,931	na
	EVG	SO	Voluntary	203,875	na
<b>DK</b>	3F	SO	Voluntary	253,430	3,000
	SL	S	Voluntary	2,986	2,986
	MMF	SO	Voluntary	10,000	1,350
	CO-SEA	S	Voluntary	1,922	1,922
<b>EE</b>	EMSA	O	Voluntary	2,350	2,040
	EMAÜ	S	Voluntary	288	288
<b>EL</b>	PNO	S	Voluntary	na	na
	PA.S.E.N.T	SO	Voluntary	na	na
<b>ES</b>	SMC-UGT	O	Voluntary	170,000	3,500
	FSC-CCOO	O	Voluntary	na	na
	ELA Zerbitzuak	SO	Mixed	26,142	na
	FETYC-CGT	O	Voluntary	na	na
	SEOMM	na	Voluntary	na	na
<b>FI</b>	Luotsiliitto	S	Voluntary	160	160
	SMU	C	Voluntary	6,300	6,300
	SKL	SO	Voluntary	2,300	850



	Trade union	Domain coverage*	Type of membership	Active members total	Active members in the sector
	SLPL	C	Voluntary	1,600	1,600
<b>FR</b>	FOMM-CGT	SO	Voluntary	na	na
	FNSM CGT	O	Voluntary	na	na
	National union CGT of offshore employees of merchant fleets	na	Voluntary	na	na
	FGTE-CFDT	O	Voluntary	50,000	na
	CFE-CGC	S	Voluntary	150	150
	SNCNMM	S	Voluntary	na	na
	FECCNL-FO	C	Voluntary	na	na
	FEETS-FO	O	Voluntary	na	na
	CFTC Transports	O	Voluntary	na	na
<b>HR</b>	SPH	C	Voluntary	2,500	2,500
<b>IE</b>	SIPTU	SO	Voluntary	199,881	800
	IMPACT	SO	Voluntary	63,500	na
	PSEU	SO	Voluntary	10,000	na
	Unite	SO	Voluntary	na	na
	TEEU	S	Voluntary	39,000	na
	SUI	SO	Voluntary	na	na
<b>IT</b>	FILT-CGIL	O	Voluntary	147,582	10,433
	FIT-CISL	O	Voluntary	na	na
	UILTrasporti	O	Voluntary	117,846	7,000
	USCLAC/UNCDiM/SMACD	S	Voluntary	na	na
<b>LT</b>	LJS	O	Voluntary	1,591	na
<b>LU</b>	OGBL-ACAL	O	Voluntary	na	na
	LCGB-Transport	O	Voluntary	700	na
<b>LV</b>	LTFJA	S	Voluntary	7,642	7,642
	ŪTAF	SO	Voluntary	1,581	866
	LNJA	S	Voluntary	na	na
<b>MT</b>	MDU	S	Voluntary	600	600
	GWU	SO	Voluntary	39,201	na
	UHM	SO	Voluntary	na	na
<b>NL</b>	CMHF	SO	Voluntary	57,000	na

	Trade union	Domain coverage*	Type of membership	Active members total	Active members in the sector
	CNV	O	Voluntary	127,000	na
	FNV	O	Voluntary	6,915	200
	NINL/ Nautilus	SO	Voluntary	4,872	2,698
	VPW	SO	Voluntary	na	na
<b>PL</b>	OZZOiM	SO	Voluntary	4,950	na
	FZZ MiR	SO	Voluntary	2,199	1,464
	KSM MiR NSZZ "Solidarność"	S	Voluntary	5,391	na
<b>PT</b>	OFICIAISMAR	S	Voluntary	235	235
	FESMAR	C	Voluntary	na	na
	SIMAMEVIP	SO	Voluntary	na	na
	Sindicato XXI	S	Voluntary	500	500
	STFCMM	C	Voluntary	na	na
	SITEMAQ	SO	Voluntary	na	na
<b>RO</b>	SLN	C	Voluntary	5,050	5,050
<b>SE</b>	SEKO	SO	Voluntary	79,371	6,300
	SBF	SO	Voluntary	3,600	3,000
	Lotsförbundet	S	Voluntary	205	205
	Unionen	SO	Voluntary	500,000	1,040
<b>SI</b>	SPS	S	Voluntary	na	na
	SDPS-KS 90	S	Voluntary	na	na
	SDSP-KNSS	S	Voluntary	12	12
	SPSP-ZSSS	S	Voluntary	4	4
	SŽPD	S	Voluntary	400	400
	SPDS	SO	Voluntary	180	130
<b>UK</b>	RMT	SO	Voluntary	70,521	4,687
	Nautilus	C	Voluntary	12,297	12,297
	Prospect	SO	Voluntary	100,000	na
	TSSA	SO	Voluntary	19,500	250
	Unite	O	Voluntary	1,405,071	19,000

Notes: \* Domain coverage: C = congruence; O = overlap; SO = sectional overlap; S = sectionalism. na = information not available. A more detailed description of the trade unions' membership domains with regard to the sector is found in Table A3.

**Table A2: Density, collective bargaining, consultation and affiliations of trade unions in the maritime transport sector, 2015**

	Trade union	Sectoral density (%)	Collective bargaining *	Consultation/ frequency		National, European and international affiliations**
				Yes	On a regular basis	
<b>BE</b>	ABVV/BTB - FGTB/UBT	na	M + S	Yes	On a regular basis	ABVV-FGTB; <i>ETF</i> ; ITF
	ACV/CSC Transcom	22.0	M + S	Yes	On a regular basis	ACV/CSC; <i>ETF</i> ; ITF, ILO
	CGSLB/ACLVB	na	M + S	Yes	On a regular basis	na; <i>ETF</i> ; na
	BBTK-SETCa	na	M + S	Yes	na	ABVV-FGTB; <i>ETF</i> ; ITF
<b>BG</b>	FTTUB	na	M + S	Yes	On a regular basis	CITUB; <i>ETF</i> ; ITF
	FTW Podkrepa	na	S	na	na	CL Podkrepa; <i>ETF</i> ; ITF
	STU	32.7	S	No	na	None; <i>ETF</i> ; ITF
<b>CY</b>	OMEPEGE-SEK	na	M + S	Yes	na	<i>ETF</i>
	SEGDAMELIN-PEO	10.8	M + S	Yes	On a regular basis	Pancyprian Federation of Labour; IDC, TUI
<b>CZ</b>	OSN	na	No	Yes	On an ad hoc basis	None; <i>ETF</i> ; ITF
<b>DE</b>	Ver.di	29.8	M + S	Yes	On a regular basis	DGB; <i>ETF</i> ; ITF
	EVG	na	S	No	na	DGB; <i>ETF</i> ; ITF

<b>DK</b>	3F	23.5	M + S	Yes	On an ad hoc basis	The Danish Confederation of Trade Unions (LO); <i>ETF</i> , <i>IndustriAll Europe</i> , <i>EFFAT</i> , <i>European Federation of Building and Woodworkers (EFBWW)</i> , <i>EPSU</i> ; ITF, PSI, UNI Global Union, IndustriAll Global Union
	SL	23.4	M + S	Yes	On an ad hoc basis	<i>EFT</i> , <i>European Maritime Pilots' Association (EMPA)</i> ; ITF, IFSMA (officers), IMPA (pilots)
	MMF	10.6	M + S	Yes	On an ad hoc basis	<i>Nordiska Maskinbefälsfederationen (NMF)</i> , <i>Fédération Internationale des Cadres des Transports</i> ; None
	CO-SEA	15.0	M + S	Yes	On an ad hoc basis	LO; <i>ETF</i> ; ITF
<b>EE</b>	EMSA	12.7	S	Yes	On an ad hoc basis	Estonian Trade Union Confederation (EAKL), Estonian Transport Workers' Federation (ETAF); <i>ETF</i> ; ITF
	EMAÜ	1.8	M + S	Yes	On an ad hoc basis	EAKL, ETAF; <i>ETF</i> , <i>Seafarers' Committee of Central, Eastern Europe and Norway</i> ; ITF
<b>EL</b>	PNO	na	M	No	na	Greek General Confederation of Labour (GSEE); <i>ETF</i> ; ITF
	P.A.S.E.N.T	na	M	Yes	On an ad hoc basis	Federation of Greek Private Sector Employees (OIYE)
<b>ES</b>	SMC-UGT	23.6	M + S	Yes	On an ad hoc basis	General Union Workers (UGT); <i>ETF</i> ; ITF

	FSC-CCOO	na	M + S	na	na	Trade Union Confederation of Workers' Commissions; <i>ETF</i> ; ITF
	ELA Zerbitzuak	na	na	na	na	None; <i>ETF</i> ; ITF
	FETYC-CGT	na	na	na	na	General Confederation of Labour (CGT)
	SEOMM	na	S	na	na	na
<b>FI</b>	Luotsiliitto	1.6	S	Yes	On an ad hoc basis	Federation of Salaried Employees (Pardia); <i>EMPA</i> ; International Maritime Pilots' Association
	SMU	64.8	M + S	Yes	On a regular basis	Central Organisation of Finnish Trade Unions (SAK), Federation of Unions in the Transport Sector (KAF); <i>European Sea Ports Organisation, Nordic Transport Workers' Federation (NTF)</i> ; ITF
	SKL	8.7	M + S	Yes	On an ad hoc basis	Finnish Confederation of Professionals (STTK), KAF, Industrial Employees (TP), Pardia; <i>ETF, NTF</i> ; International Labour Organization, IMO, ITF
	SLPL	16.4	M + S	Yes	On a regular basis	Pardia, STTK; <i>ETF</i> ; IFSMA IMO, ITF
<b>FR</b>	FOMM-CGT	na	M + S	Yes	On an ad hoc basis	General Confederation of Labour (CGT), General Union of Engineers, Managers and Technicians - CGT (UGICT); <i>ETF</i> ; ITF
	FNSM CGT	na	M + S	Yes	On an ad hoc basis	CGT; <i>ETF</i> ; ITF
	National union CGT of offshore employees of merchant fleets	na	No	No	na	na

	FGTE-CFDT	na	M + S	Yes	On an ad hoc basis	French Democratic Confederation of Labour (CFDT); <i>ETF</i> ; ITF
	CFE-CGC	1.25	M + S	Yes	On an ad hoc basis	French Confederation of Professional and Managerial Staff (CFE-CGC); Fédération Internationale des Cadres des Transports (FICT)
	SNCNMM	na	na	No	na	CFE-CGC
	FECCNL-FO	na	na	No	na	General Confederation of Labour - Force Ouvrière (CGT-FO)
	FEETS-FO	na	na	Yes	On an ad hoc basis	CGT-FO; <i>ETF</i> ; ITF
	CFTC Transports	na	M + S	Yes	On an ad hoc basis	French Christian Workers' Confederation (CFTC); <i>ETF</i>
<b>HR</b>	SPH	89.7	M	Yes	On a regular basis	None; <i>ETF</i> ; ITF, Nautilus Federation
<b>IE</b>	SIPTU	57.4	S	na	na	ICTU; <i>ETF</i>
	IMPACT	na	S	No	na	ICTU
	PSEU	na	S	No	na	ICTU
	Unite	na	S	No	na	ICTU
	TEEU	na	S	Yes	na	ICTU
	SUI	na	na	na	na	ICTU; <i>ETF</i> ; ITF
<b>IT</b>	FILT-CGIL	28	M + S	Yes	On a regular basis	Confederazione Generale Italiana del Lavoro (CGIL); <i>ETF</i> ; ITF
	FIT-CISL	na	M + S	Yes	On a regular basis	Confederazione Italiana Sindacati Lavoratori (CISL); <i>ETF</i> ; ITF
	UILTrasporti	18.8	M + S	Yes	na	Unione Italiana del Lavoro (UIL); <i>ETF</i> ; ITF

	USCLAC/UNCDi M/SMACD	na	M + S	Yes	On a regular basis	Federazione Nazionale Dirigenti di Aziende Industriali (FEDERMANAGER) <i>Confederation of European Shipmasters' Associations</i> ; IFSMA
<b>LT</b>	LJS	na	S	Yes	On an ad hoc basis	<i>ETF</i> ; ITF
<b>LU</b>	OGBL-ACAL	na	M	na	na	OGBL; <i>ETF</i>
	LCGB-Transport	na	M	na	na	LCGB; <i>ETF</i> , <i>European Trade Union Confederation (ETUC)</i> ; International Trade Union Confederation (ITUC)
<b>LV</b>	LTFJA	na	No	Yes	On a regular basis	Free Trade Union Confederation of Latvia (LBAS); <i>ETF</i> , <i>Member of permanent commissions of Baltic States</i> ; ITF
	ŪTAF	na	S	Yes	On an ad hoc basis	LBAS; <i>ETF</i> ; ITF
	LNJA	na	M	No	na	None
<b>MT</b>	MDU	75.2	S	Yes	On an ad hoc basis	International Dockers Union
	GWU	na	S	Yes	On an ad hoc basis	<i>ETF</i> ; ITF
	UHM	na	S	Yes	On an ad hoc basis	Confederation of Malta Trade Unions
<b>NL</b>	CMHF	na	S	na	na	Trade Union for Professionals (VCP); <i>ETUC</i> , <i>Eurocadres</i>
	CNV	na	S	Yes	On an ad hoc basis	n/a; <i>ETF (only the subdivision CNV Vakmensen)</i> ; ITF (only the subdivision CNV Vakmensen)
	FNV	0.7	S	No	na	n/a; <i>ETF</i> ; ITF
	NINL/Nautilus	8.9	M + S	Yes	On a regular basis	None; <i>ETF</i> ; IFSMA,, ILO, IMO, ITF,

	VPW	na	S	na	na	AC Rijksvakbonden
<b>PL</b>	OZZOiM	na	S	Yes	On a regular basis	Trade Unions Forum (FZZ); <i>ETF</i> ; ITF
	FZZ MiR	54.2	S	Yes	On an ad hoc basis	The All-Poland Alliance of Trade Unions (OPZZ) <i>ETF</i> ; ITF
	KSM MiR NSZZ „Solidarność”	na	S	Yes	On a regular basis	Independent and Self-Governing Trade Union Solidarność (NSZZ Solidarność); <i>ETF</i> ; ITF
<b>PT</b>	OFICIAISMAR	1.1	No	Yes	On a regular basis	CGTP-IN, FECTRANS <i>ETF</i> ; ITF
	FESMAR	na	M + S	na	na	UGT
	SIMAMEVIP	na	M + S	na	na	CGTP-IN, FECTRANS
	Sindicato XXI	2.4	S	Yes	On an ad hoc basis	Federação Nacional dos Sindicatos de Trabalhadores Portuários
	STFCMM	na	S	na	na	CGTP-IN, FECTRANS
	SITEMAQ	na	M + S	na	na	UGT
<b>RO</b>	SLN	3.4	M + S	Yes	On a regular basis	Conventia Sindicala Nationala a Transportatorilor din Romania (CSNTR) <i>ETF</i> ; ITF
<b>SE</b>	SEKO	104.7	M	Yes	On a regular basis	The Swedish Trade Union Confederation; <i>ETF</i> , <i>UNI Europa</i> , <i>The European Federation of Building and Woodworkers</i> , <i>EPSU</i> ; Building and Wood Worker's International (BWI), ITF, PSI, UNI Global Union
	SBF	49.9	M	Yes	On a regular basis	Ledarna; <i>ETF</i> ; ITF
	Lotsförbundet	3.4	M	Yes	On a regular basis	SRAT, SACO; <i>EMPA</i>



	Unionen	17.3	M	Yes	On an ad hoc basis	Swedish Confederation for Professional Employees; <i>EFFAT</i> , <i>ETF</i> , <i>IndustriALL Europe</i> , <i>UNI Europa</i> ; IndustriALL Global Union, ITF, UNI Global Union
<b>SI</b>	SPS	na	S	No	na	Trade union confederation KS-90 <i>ETF</i> ; ITF
	SDPS-KS 90	na	S	No	na	KS-90
	SDSP-KNSS	2.9	S	No	na	KNSS
	SPSP-ZSSS	1.0	S	No	na	ZSSS
	SŽPD	96.9	S	No	na	Trade union confederation Alternativa; <i>ETF</i> ; ITF
	SPDS	31.5	S	No	na	KS-90
<b>UK</b>	RMT	8.6	S	Yes	On a regular basis	Trades Union Congress (TUC); <i>ETF</i> ; ITF, IndustriAll Global Union, World Federation of Trade Unions
	Nautilus	22.7	S	Yes	On a regular basis	TUC; <i>ETF</i> ; IFSMA, ITF
	Prospect	na	S	Yes	On an ad hoc basis	TUC; <i>ETF</i> , <i>EPSU</i> , <i>Eurocadres</i> , <i>UNI Europa</i> ; ITF, PSI, UNI Global Union
	TSSA	0.5	S	No	na	TUC; <i>ETF</i> ; ITF
	Unite	35.1	S	Yes	na	TUC; <i>ETF</i> , <i>EFBWW</i> , <i>EFFAT</i> , <i>EPSU</i> , <i>IndustriAll Europe</i> , <i>UNI Europa</i> ; ITF, BWI, IndustriAll Global Union, International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers, PSI, UNI Global Union.

Notes: \* Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining. \*\* European affiliations in italics. na = information not available. n/a = not applicable.

**Table A3: Trade unions' domain coverage and domain description in relation to the maritime transport sector, 2015**

	National association	Domain coverage*	Domain description
<b>BE</b>	ABVV/BTB - FGTB/UBT	SO	Blue-collar workers in the total transport sector
	ACV/CSC Transcom	O	na
	CGSLB/ACLVB	O	na
	BBTK-SETCa	SO	Employees, technicians and executives in several sectors (including trade, industry, logistics, finance, social profit)
<b>BU</b>	FTTUB	SO	All workers in some activities of the maritime transport in the Varna region as well as workers from the port sector
	FTW Podkrepa	SO	All workers in freight maritime transport and rail transport, other passenger land transport, passenger transport by inland waterways, freight transport by inland waterways, passenger air transport, and warehousing and storage
	STU	S	All workers in passengers and freight maritime transport in the region of Varna
<b>CY</b>	OMEPEGE-SEK	SO	All workers in all activities in the private sector
	SEGDAMELIN-PEO	SO	All workers in all activities in the private sector
<b>CZ</b>	OSN	O	All workers in the whole maritime transport sector and inland water transport
<b>DE</b>	Ver.di	O	All workers in transport and services
	EVG	SO	All workers in two ferry lines
<b>DK</b>	3F	SO	Unskilled and skilled workers in the private as well as the public sector
	SL	S	White-collar workers (officers) in the maritime transport sector
	MMF	SO	Ships' engineers (chief engineers)
	CO-SEA	S	Blue-collar and navy constables
<b>EE</b>	EMSA	O	All workers in maritime transport sector, warehousing, ports and hotel workers
	EMAÜ	S	Seamen workers on freight ships
<b>EL</b>	PNO	S	Greek seamen and maritime workers in

	National association	Domain coverage*	Domain description
			maritime transport of passengers – cabotage and intra-community transports – and goods
	PA.S.E.N.T	SO	Office workers and auxiliary personnel of shipping enterprises and tourism agency activities
<b>ES</b>	SMC-UGT	O	All workers in maritime transport, road and rail transport, ports, gambling, hotel and restaurants, and communication
	FSC-CCOO	O	All workers in maritime transport, public administration, road and railways transport, tourism, telecommunications and information technology, postal services and courier companies, graphic arts, paper and photography, mass media, culture, leisure and shows, ports
	ELA Zerbitzuak	SO	All workers in maritime transport, road transport, ports, banking, commerce, cleaning, hotel and restaurants, food and emergent sectors in the Basque Country region
	FETYC-CGT	O	All workers in maritime transport, other transport activities and telecommunications
	SEOMM	na	Maritime officers
<b>FI</b>	Luotsiliitto	S	Maritime piloting
	SMU	C	All workers in the whole maritime transport sector
	SKL	SO	White-collar workers in maritime transport sector and several engineering and manufacturing sectors
	SLPL	C	All workers in the whole maritime transport sector
<b>FR</b>	FOMM-CGT	SO	White-collar workers (officers) in maritime transport and ports
	FNSM CGT	O	All workers in maritime transport and ports
	National union CGT of offshore employees of merchant fleets	na	na
	FGTE-CFDT	O	All workers in maritime transport, transport by road and railways, the port sector, infrastructure and public transport
	CFE-CGC	S	Officers and managerial staff in the maritime transport sector
	SNCNMM	S	White-collar workers in the maritime transport sector

	National association	Domain coverage*	Domain description
	FECCNL-FO	C	All workers in the whole maritime transport sector
	FEETS-FO	O	All workers in maritime transport sector, infrastructure, environment services, transport (except transport by road), services (cleaning industry, motorways, private security, railways cargo handling)
	CFTC Transports	O	All workers in maritime transport sector, railway transport, civil aviation, airport services, cash-transport operation, waste industry, funeral director services, ski lift, travel agencies, railway catering, port sector
<b>HR</b>	SPH	C	All workers in the whole maritime transport sector
<b>IE</b>	SIPTU	SO	Blue-collar workers in most of the sectors
	IMPACT	SO	Workers in the commissioners of Irish Lights and workers in the public, voluntary and community sectors, semi-state organisations and private sector companies
	PSEU	SO	Workers in the commissioners of Irish Lights and executive grades in the civil service and wider public service
	Unite	SO	Workers in the commissioners of Irish Lights and in many other public and private sectors
	TEEU	S	Workers in the commissioners of Irish Lights
	SUI	SO	Crew/marine and port workers
<b>IT</b>	FILT-CGIL	O	All workers in maritime transport, support activities for transportation via land and via air, warehousing activities, railway transport, urban public transport, motorways, logistics and civil aviation sector
	FIT-CISL	O	All workers in the freight and passenger transport sector, storage, in the integrated waste management and in the cleaning services
	UILTrasporti	O	All workers in freight and passenger transport, in support activities for transportation via land and via air, in warehousing activities, in the integrated waste management services and in the cleaning services
	USCLAC/UNCDiM/SMACD	S	Sea captains, Chief Engineers and Officers

	National association	Domain coverage*	Domain description
<b>LT</b>	LJS	O	All workers in maritime transport, fishing and inland water transport sectors
<b>LU</b>	OGBL-ACAL	O	All workers in all transport sectors and logistic
	LCGB-Transport	O	All workers in all transport sectors and logistic
<b>LV</b>	LTFJA	S	All workers in passenger and freight maritime transport (incidental activities excluded)
	ŪTAF	SO	All workers in freight transport and service activities plus civil aviation workers, ship repairing enterprises and similar
	LNJA	S	Seafarers employed in the merchant fleet
<b>MT</b>	MDU	S	Blue-collar workers in the whole maritime transport sector
	GWU	SO	All workers in costal water passenger transport and service activities incidental to water transportation plus many other sectors
	UHM	SO	na
<b>NL</b>	CMHF	SO	White-collar workers in sector-related activities plus many other sectors
	CNV	O	Cross-sectoral trade union
	FNV	O	Cross-sectoral trade union
	NINL/Nautilus	SO	All workers in the whole transport sector except some service activities incidental to water transportation. It also covers inland water transport, construction of water projects (including offshore projects), and a range of maritime services such as sector-specific insurance agencies, surveyors, financiers, training and education, and cleaning
	VPW	SO	All workers in coastal water transport and service activities. It also covers all personnel within the Ministry of Infrastructure and the Environment
<b>PL</b>	OZZOiM	SO	All workers in the maritime transport sector in the Pomerania and West Pomerania regions. It also covers port sectors
	FZZ MiR	SO	All workers in the maritime transport sector in the Pomerania and West Pomerania regions. It also covers port sectors
	KSM MiR NSZZ Solidarność	S	All workers in the maritime transport sector in the Pomerania and West Pomerania

	National association	Domain coverage*	Domain description
			regions
<b>PT</b>	OFICIAISMAR	S	Blue-collar workers in the maritime transport sector
	FESMAR	C	All workers in the whole maritime transport sector
	SIMAMEVIP	SO	All workers in freight transport and workers from Transport Agents and Fishery
	Sindicato XXI	S	Freight water transport in two companies: PSA and Laborsines
	STFCMM	C	All workers in the whole maritime transport sector
	SITEMAQ	SO	White-collar workers in the maritime transport sector except some activities incidental to water transport. It also covers the energy sector
<b>RO</b>	SLN	C	All workers in the whole maritime transport sector
<b>SE</b>	SEKO	SO	Blue-collar workers in the traffic, communications, energy, criminal justice and defence sectors
	SBF	SO	Maritime officers in maritime and inland passenger and freight water transportation
	Lotsförbundet	S	Maritime pilots in the Swedish Maritime Administration
	Unionen	SO	White-collar workers in general
<b>SI</b>	SPS	S	Workers in company Genshipping Corporation
	SDPS-KS 90	S	Workers in the company Splošna plovba Portorož d.d.
	SDSP-KNSS	S	Workers in the company Splošna plovba Portorož, d.d.
	SPSP-ZSSS	S	Workers in the company Splošna plovba Portorož, d.d.
	SŽPD	S	Workers from Luka Koper Group (state-owned company)
	SPDS	SO	Large majority of union`s members come from the Luka Koper Group (state-owned company)
<b>UK</b>	RMT	SO	All workers in passenger and freight water transport and in some service activities incidental to water transportation (such as operation of harbours and piers, and berthing) but not all such activities. It also

	National association	Domain coverage*	Domain description
			covers rail transport (passenger and freight), rail infrastructure, buses, road freight, and offshore oil and gas
	Nautilus	C	All workers in the whole maritime transport sector
	Prospect	SO	Specialist (professional) staff in service activities incidental to water transport
	TSSA	SO	Shore-based managers, clerical workers and port staff
	Unite	O	All workers in port-based and coastal maritime activity, including ports, ferries, pilotage and towage

Note: \* Domain coverage: C = congruence; O = overlap; SO = sectional overlap; S = sectionalism.

## Employer organisations

**Table A4: Domain coverage and membership of employer/business organisations in the maritime transport sector, 2015**

	Employer organisation	Domain coverage *	Type of membership	Total companies	in the sector	Total employees	in the sector
<b>BE</b>	KBRV-URAB	S	Voluntary	26	25	5,500	na
<b>BG</b>	BSA	S	Voluntary	5	5	1,000	5
<b>CY</b>	KNE-CSC	SO	Voluntary	168	na	4,000	na
<b>DE</b>	VDR	C	Voluntary	186	186	20,000	20,000
<b>DK</b>	Rederiforening	O	Voluntary	93	93	23,048	na
	DI	SO	Voluntary	10,000	95	1,000,000	na
<b>EE</b>	ELL	O	Voluntary	13	11	8,000	6,500
<b>EL</b>	UGS	S	Voluntary	1,005	1,005	8,000	8,000
	SEEN	S	Voluntary	21	21	4	4
<b>ES</b>	ANAVE	C	Voluntary	34 direct members and 11 associate collaborators members	34 direct members and 11 associate collaborators members	na	na
<b>FI</b>	SET	S	Voluntary	3	3	226	226
	SV	C	Voluntary	23	23	Na	Na
<b>FR</b>	Armateurs de	C	Voluntary	47	47	18,500	18,500

	France						
	APERMA	S	Voluntary	10	10	700	700
	GASPE	S	Voluntary	21	21	1,000	1,000 (600 seafarers, 400 onshore employees)
<b>HR</b>	CSA Mare nostrum	O	Voluntary	10	10	na	na
<b>IE</b>	ICS	S	Voluntary	na	na	na	na
	Ibec	O	Voluntary	7,500	Na	na	na
<b>IT</b>	Confitarma	S	Voluntary	155	155	24,000	24,000
	Fedarlinea	S	Voluntary	7	7	1,500	1,500
	Assorimorchia tori	S	Voluntary	22	22	1,000	1,000
	Federimorchia tori	C	Voluntary	6	6	462	462
	Assiterminal	S	Voluntary	64	64	6,020	6,020
	Assologistica	SO	Voluntary	230	35	25,000	2,000
	Fise-Uniport	S	Voluntary	25	25	3,000	3,000
	Assoporti	S	Voluntary	23	23	1,200	1,200
	Legacoop servizi	SO	Voluntary	1895	52	164,600	2,090
	Angopi	S	Voluntary	61	61	900	900
<b>LT</b>	LLSA	SO	Voluntary	6	5	1,600	1,400
<b>LU</b>	Fedil Shipping	C	Voluntary	4	4	800	800
<b>MT</b>	MISC	S	Voluntary	na	na	na	na
<b>NL</b>	KVNR	S	Voluntary	470	470	na	na
	Nemea	S	Voluntary	181	181	22,101	22,101
	Neptune	S	Voluntary	19	19	500	500
	SMW	S	Voluntary	7	7	12,667	12,667
	VWH	S	Voluntary	213	213	9,658	9,658
<b>PL</b>	ZAP	S	Voluntary	16	8	65,000	0
<b>PT</b>	AAMC	O	Voluntary	14	10	650	335
<b>RO</b>	OPOPC	S	Voluntary	35	35	6,000	6,000
<b>SE</b>	SARF	S	Voluntary	na	93	na	na
	SRF	C	Voluntary	60	60	na	na



<b>SI</b>	GIZ-ZLS	S	Voluntary	4	4	na	na
<b>UK</b>	UK Chamber of Shipping	O	Voluntary	142	100	na	na

Notes: \* Domain coverage: C = congruence; O = overlap; SO = sectional overlap; S = sectionalism.

A more detailed description of the employer organisations' membership domains with regard to the sector is given in Table A6.

na = not available

**Table A5: Density, collective bargaining, consultation and affiliations of employer organisations in the maritime transport sector, 2015**

	Employer organisation	Sectoral density (%)		CB*	Consultation		National European International affiliations**
		Companies	Employees				
<b>BE</b>	KBRV-URAB	39.1	na	M	Yes	On a regular basis	Verbond van Belgische Ondernemingen; <i>ECSA</i> ; ICS
<b>BG</b>	BSA	7.8	0.4	M	Yes	On a regular basis	Confederation of Employers and Industrialists in Bulgaria (CEIBG) <sup>a</sup>
<b>CY</b>	KNE-CSC	na	na	M	Yes	On a regular basis	Cyprus Industrialists and Employers Federation (OEB); <i>ECSA</i> ; BIMCO, ICS, International Shipping Federation; INTERTANKO
<b>DE</b>	VDR	6.6	3.6	M	Yes	On an ad hoc basis	BDA; <i>ECSA</i> ; ICS; BIMCO; International Bunker Industry Association
<b>DK</b>	Rederiforening	18.6	na	M+S	Yes	On an ad hoc basis	Confederation of Danish Employers (DA); <i>ECSA</i> ; ICS
	DI	19.0	na	M+S	Yes	On an ad hoc basis	DA; <i>FEPOR</i> , <i>Business Europe</i> ; BIAC
<b>EE</b>	ELL	0.9	40.4	No	Yes	On an ad hoc basis	Estonian Employers' Confederation (ETTK); <i>ECSA</i>

	Employer organisation	Sectoral density (%)		CB*	Consultation		National European International affiliations**
		Companies	Employees				
EL	UGS	17.3	14.6	M	Yes	On a regular basis	ECSA; ICS
	SEEN	0.4	0.0	M	No	na	Association of Greek Tourism Enterprises (SETE)
ES	ANAVE	na	na	M	na	na	Spanish Confederation of Employers' Organisations (CEOE); ECSCA; ICS
FI	SET	0.9	2.3	M+S	Yes	On a regular basis	None
	SV	6.6	na	M	Yes	On a regular basis	ECSCA; ICS
FR	Armateurs de France	5.4	84.1	M	Yes	On an ad hoc basis	MEDEF; ECSCA ICS
	APERMA	1.1	3.2	M	Yes	On an ad hoc basis	None
	GASPE	2.4	na	M	Yes	On an ad hoc basis	Armateurs de France
HR	CSA Mare nostrum	1.8	na	M	Yes	On a regular basis	Croatian Employers' Association (HUP); ECSCA
IE	ICS	na	na	No	na	na	ECSCA; ICS
	Ibec	na	na	S	na	na	
IT	Confitarma	5.6	64.6	M+S	Yes	On a regular basis	Federtrasporto (Confindustria), Federazione del Mare; ECSCA; BIMCO, ICS, International Shipping Federation, INTERTANKO, INTERCARGO, International

	Employer organisation	Sectoral density (%)		CB*	Consultation		National <i>European</i> International affiliations**
		Companies	Employees				
							Maritime Employers' Committee
	Fedarlinea	0.3	4.0	M+S	na	na	Confcommercio
	Assorimorchia tori	0.8	2.7	M+S	Yes	On a regular basis	
	Federimorchia tori	0.2	1.2	M+S	Yes	On a regular basis	
	Assiterminal	2.3	16.2	M+S	Yes	On an ad hoc basis	Confindustria; <i>FEPORT</i>
	Assologistica	1.3	5.4	M+S	Yes	On a regular basis	Confetra, Federtrasporto (Confindustria); <i>FEPORT</i> , <i>European Cold Storage and Logistics Association</i> ; International Federation of Warehousing and Logistics Associations
	Fise-Uniport	0.9	8.1	M+S	Yes	On a regular basis	Federazione Imprese di servizi (Fise), Federtrasporto (Confindustria)
	Assoporti	0.8	3.2	M	Yes	On an ad hoc basis	<i>European Sea Ports Organisation</i>
	Legacoop servizi	1.9	5.6	M+S	Yes	On a regular basis	Legacoop; <i>Cecop-Cicopa</i> ; International Co-operative Alliance
	Angopi	2.2	2.4	M	Yes	On a regular basis	Confcommercio; <i>European Boatmen's Association</i> ; International Boatmen's Linesmen

	Employer organisation	Sectoral density (%)		CB*	Consultation		National <i>European</i> International affiliations**
		Companies	Employees				
							Association
<b>LT</b>	LLSA	17.2	65.4	No	Yes	On an ad hoc basis	<i>ECSA</i>
<b>LU</b>	Fedil Shipping	1.8	89.6	M	Yes	On an ad hoc basis	FEDIL; <i>ECSA</i>
<b>MT</b>	MISC	na	na	na	Yes	On an ad hoc basis	<i>ECSA</i>
<b>NL</b>	KVNR	52.2	na	M	Yes	On a regular basis	VNO-NCW; <i>ECSA</i> ; ICS
	Nemea	20.1	73.0	M	No	na	KVNR (international representation is via KVNR)
	Neptune	2.1	1.7	M	No	na	KVNR (international representation is via KVNR)
	SMW	0.8	41.8	M	No	na	KVNR (international representation is via KVNR)
	VWH	23.7	31.9	M	No	na	None
<b>PL</b>	ZAP	1.4	0.0	No	Yes	On an ad hoc basis	Employers of Poland (Pracodawcy RP); <i>ECSA</i>
<b>PT</b>	AAMC	0.5	1.6	No	Yes	On an ad hoc basis	Agência Portuguesa do Transporte Marítimo de Curta Distância, Comunidade Portuária do Douro e Leixões, Comunidade Portuária de Lisboa; <i>ECSA</i> ; ICS
<b>RO</b>	OPOPC	na	4.0	M	Yes	On an ad hoc basis	National Confederation of Romanian Employers

	Employer organisation	Sectoral density (%)		CB*	Consultation		National European International affiliations**
		Companies	Employees				
							(CNPR); FEPORT; Pro Danube International
SE	SARF	9.5	na	M	Yes	On a regular basis	The Transport Group, Confederation of Swedish Enterprises; <i>European Chamber of Shipping</i> ; ICS
	SRF	6.1	na	No	Yes	On a regular basis	The Confederation of Swedish Enterprises; <i>ECSA</i> ; ICS, IMO
SI	GIZ-ZLS	8.7	na	No	Yes	On an ad hoc basis	<i>ECSA</i>
UK	UK Chamber of Shipping	5.0	na	No	Yes	On an ad hoc basis	CBI Trade Association Forum; <i>ECSA</i> ; ICS

Notes: \* Collective bargaining involvement: S = single-employer bargaining; M = multi-employer bargaining. \*\* European affiliations in italics. <sup>a</sup> BSA was affiliated to ESCA in the period 2007–2012 and to ICS in the period 2005–2011. CB = collective bargaining. na = information not available; n/a = not applicable

**Table A6: Employer organisations' domain coverage and domain description in relation to the maritime transport sector, 2015**

	National association	Domain coverage*	Domain description
BE	KBRV-URAB	S	All kinds of private companies in the whole maritime transport sector
BG	BSA	S	Some companies in service activities incidental to water transportation in the Varna and Rousse regions
CY	KNE-CSC	SO	All kinds of companies in freight maritime transport and incidental activities plus shipping-related companies that provide supporting services to ship operators
DE	VDR	C	All kinds of companies in the whole maritime transport sector
DK	Rederiforening	O	All kinds of companies in all activities regarding the so-called 'Blue Denmark' which also include offshore activities
	DI	SO	All kinds of companies in the whole maritime

	National association	Domain coverage*	Domain description
			transport sector and manufacturing industry combined with transport and service
EE	ELL	O	All kinds of companies in the whole maritime transport sector, maritime education and maritime law
ES	ANAVE	C	All kinds of companies in the whole maritime transport sector
FI	SET	S	National companies in activities incidental to maritime transport
	SV	C	All kinds of companies in the whole maritime transport sector
FR	Armateurs de France	C	All kinds of companies in the whole maritime transport sector
	APERMA	S	All kinds of companies in activities incidental to maritime transport
	GASPE	S	Public companies in freight and passenger maritime transport
EL	UGS	S	Deep sea vessels flying Greek, EU and other foreign flags
	SEEN	S	All kinds of companies in maritime passenger transport
HR	CSA Mare nostrum	O	na
IE	ICS	S	Shipowners
	Ibec	O	Companies in all areas of the economy
IT	Confitarma	S	Private companies in the whole maritime transport sector
	Fedarlinea	S	Companies that are members of the previously state-owned Tirrenia Group carrying out freight and passenger transport, cruises and related ancillary services
	Assorimorchiatori	S	Only tug owners
	Federimorchiatori	C	All kinds of companies in the whole maritime transport sector
	Assiterminal	S	Port handling sector and, in particular, vessel loading, unloading and trans-shipment as well as passengers and cargo handling, including ancillary services in the port area. It does not cover sea and coastal passenger water transport and sea and coastal freight water transport
	Assologistica	SO	All kinds of companies in service activities incidental to water transportation. It also covers logistic companies, warehouses and cold stores, freight villages and airport terminal operators

	<b>National association</b>	<b>Domain coverage*</b>	<b>Domain description</b>
	Fise-Uniport	S	All kinds of companies in sea and coastal passenger water transports
	Assoporti	S	Public port authorities
	Legacoop servizi	SO	Cooperatives in the whole maritime transport sector and most of the activities of the tertiary sector
	Angopi	S	Activities of pilotage and mooring connected with maritime transport and inland water
<b>LT</b>	LLSA	SO	All kinds of companies in passenger and cargo transportation. It also covers education sector
<b>LU</b>	Fedil Shipping	C	All kinds of companies in the whole maritime transport sector
<b>MT</b>	MISC	S	Shipowners
<b>NL</b>	KVNR	S	All kinds of companies in the whole maritime transport sector except activities incidental to water transportation
	Nemea	S	All kinds of companies in the whole maritime transport sector except activities incidental to water transportation
	Neptune	S	All kinds of companies in maritime freight transport
	SMW	S	All kinds of companies in the whole maritime transport sector except activities incidental to water transportation
	VWH	S	All kinds of companies in maritime freight transport
<b>PL</b>	ZAP	S	Big national companies in the whole maritime transport sector in the Pomerania, West Pomerania and Mazovia regions
<b>PT</b>	AAMC	O	All kinds of companies in the whole maritime transport sector, maritime tourism activities, management companies and vessels towing sector
<b>RO</b>	OPOPC	S	Private companies in the whole maritime transport sector in the Port of Constanta, Port of Mangalia and Port Midia
<b>SE</b>	SARF	S	Public-owned companies in the whole maritime transport sector
	SRF	C	All kinds of companies in the whole maritime transport sector
<b>SI</b>	GIZ-ZLS	S	All kinds of companies in the whole maritime transport sector in Coast-Karst region
<b>UK</b>	UK Chamber of Shipping	O	All kinds of companies in the whole maritime transport sector and activities related to the maritime transport sector, such as crewing

	National association	Domain coverage*	Domain description
			agencies, maritime training providers, maritime colleges, classification societies, law firms, accountancy firms and banks

Note: \*Domain coverage: C = congruence; O = overlap; SO = sectional overlap; S = sectionalism.

## Annex 2: Organisation abbreviations

Table A7: Trade union organisation names

	Abbreviation	Full name
<b>BE</b>	ABVV-BTB/FGTB-UBT	Belgian Transport Union
	ACV/CSC Transcom	Christian Transcom Union
	CGSLB/ACLVB	Federation of Liberal Trade Unions of Belgium
	BBTK/SETCa	Socialistic Trade Union for employees, technicians and executives
<b>BG</b>	FTTUB	Federation of Transport Trade Unions in Bulgaria
	FTW Podkrepa	Federation of Transport Workers Podkrepa
	STU	Seafarers' Trade Union
<b>CY</b>	OMEPEGE-SEK	Federation of Transport, Petroleum and Agriculture Workers
	SEGDA MELIN-PEO	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union
<b>CZ</b>	OSN	Czech Trade Union of Seafarers
<b>DE</b>	Ver.di	United Services Union
	EVG	Railway and Transport Union
<b>DK</b>	3F	United Federation of Danish Workers
	SL	Danish Maritime Officers' Union
	MMF	Danish Engineers' Association
	CO-SEA	Danish Union for Seafarers
<b>EE</b>	EMSA	Estonian Seamen's Independent Union
	EMAÜ	Estonian Seafarers' Union
<b>EL</b>	PNO	Pan-Hellenic Seamen's Federation
	PASENT	Pan-Hellenic Association of Employees in Shipping and Tourism
<b>ES</b>	SMC-UGT	Federation of Services for Mobility and Consumption
	FSC-CCOO	Federation of Citizen Services of the Trade Union Confederation of Workers' Commissions
	ELA Zerbitzuak	Basque Workers' Solidarity
	FETYC-CGT	National Federation of Transport and Communications - General Confederation of Labour
	SEOMM	Spanish Trade Union of Maritime Officers



	<b>Abbreviation</b>	<b>Full name</b>
<b>FI</b>	Luotsiliitto	Finnish Maritime Pilots' Association
	SMU	Finnish Seafarers' Union
	SKL	Finnish Engineers' Association
	SLPL	Finnish Ships' Officers' Union
<b>FR</b>	FOMM-CGT	Federation of Merchant Marine Officers CGT
	FNSM CGT	National Federation of Maritime Unions CGT
	National union CGT of offshore employees of merchant fleets	National union CGT of offshore employees of merchant fleets
	FGTE-CFDT	General Federation of Transport and Civil Engineering, Maritime Transport Sector
	CFE-CGC	National union of seafarers' managers of the merchant marine French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	SNCNMM	National Union of Merchant Navy Executives
	FECCNL-FO	Employees and Managers' Federation CGT-FO of the Merchant Fleets
	FEETS-FO	Maritime section of the Federation of Civil Engineering, Transport and Services, Merchant Navy Sector
	CFTC Transports	General Federation CFTC Transports
<b>HR</b>	SPH	Seafarers' Union of Croatia
<b>IE</b>	SIPTU	Services, Industrial, Professional and Technical Union
	IMPACT	Irish Municipal Public and Civil Trade Union
	PSEU	Public Service Executive Union
	Unite	Unite
	TEEU	Technical Engineering and Electrical Union
	SUI	Seamen's Union of Ireland
<b>IT</b>	FILT-CGIL	Italian Transport Workers' Federation
	FIT-CISL	Italian Transport Federation
	UILTrasporti	Italian Transport Workers' Union
	USCLAC/UNCDiM/SMA CD	Italian Masters/Chief Engineers/Officers Union
<b>LT</b>	LJS	Lithuanian Seamen's Union
<b>LU</b>	OGBL/ACAL	Independent Trade Union Confederation of Luxembourg – Road Transport Union
	LCGB-Transport	Luxembourg Confederation of Christian Unions in Luxembourg–Transport
<b>LV</b>	LTFJA	Latvian Seafarers' Union of Merchant Fleet

	<b>Abbreviation</b>	<b>Full name</b>
	ŪTAF	Water Transport Trade Union Federation
	LNJA	Latvian National Seafarers Trade Union
<b>MT</b>	MDU	Malta Dockers' Union
	GWU	General Workers' Union
	UHM	United Workers' Union
<b>NL</b>	CMHF	The Federation of Intermediate and Higher Employees in Government and Education, Companies and Institutions
	CNV	National Federation of Christian Trade Unions
	FNV	Federation of Dutch Trade Unions
	NINL/Nautilus	Nautilus International Netherlands
	VPW	Union of Transport and Public Works Personnel
<b>PL</b>	OZZOiM	Polish Seafarers' Union
	FZZ MiR	Seamen and Fishermen Trade Union Federation
	KSM MiR NSZZ Solidarność	National Maritime Section of NSZZ Solidarność union
<b>PT</b>	OFICIAISMAR	Union of Captains, Official Pilots, Commissioners, and Engineers of the Merchant Marine
	FESMAR	Federation of Sea Workers
	SIMAMEVIP	Union Workers at the Merchant Marine, Transport Agents and Fishery
	Sindicato XXI	Trade union association of administrative workers, technicians and operators of containerised cargo terminals of the Port of Sines
	STFCMM	Union of River and Coastal Transports and of the Merchant Marine
	SITEMAQ	Union of Seamanship at the Merchant Marine, Energy and Stokers on Land
<b>RO</b>	SLN	Romanian Seafarers Free Union
<b>SE</b>	SEKO	Swedish Union for Service and Communication Employees
	SBF	Maritime Officers' Association
	Lotsförbundet	The Swedish Pilots' Association
	Unionen	Unionen
<b>SI</b>	SPS	Seamen's Union of Slovenia
	SPDS	Docker's Union of Slovenia
	SDPS-KS 90	Trade Union of Workers in Maritime Slovenia - KS 90
	SDSP-KNSS	Trade Union of Workers in Maritime Slovenia - KNSS
	SPSP-ZSSS	Trade Union of Workers in Maritime Slovenia - ZSSS
	SŽPD	Trade Union of Crane Operators - Luka Koper
<b>UK</b>	RMT	National Union of Rail, Maritime and Transport Workers

	<b>Abbreviation</b>	<b>Full name</b>
	Nautilus	Nautilus International
	Prospect	Prospect
	TSSA	Transport Salaried Staffs' Association
	Unite	Unite the Union

**Table A8: Employer organisation names**

	<b>Abbreviation</b>	<b>Full name</b>
<b>BE</b>	KBRV-URAB	Royal Belgian Shipowners' Association
<b>BG</b>	BSA	Bulgarian Shipowners' Association
<b>CY</b>	KNE-CSC	Cyprus Shipping Chamber
<b>DE</b>	VDR	German Shipowners' Association
<b>DK</b>	Rederiforening	Danish Shipowners' Association
	DI	Confederation of Danish Industry
<b>EE</b>	ELL	Estonian Shipowners' Association
<b>EL</b>	UGS	Union of Greek Shipowners
	SEEN	Greek Shipowners' Association for Passenger Ships
<b>ES</b>	ANAVE	Spanish Shipowners' Associations
<b>FI</b>	SET	Finnish employers' organisation for special vessels
	SV	Finnish Shipowners' Association
<b>FR</b>	Armateurs de France	French Shipowners' Association
	APERMA	Professional association of maritime towing companies
	GASPE	Grouping of owners of public water passages services
<b>HR</b>	CSA Mare nostrum	Croatian Shipowners' Association - Mare Nostrum
<b>IE</b>	ICS	Irish Chamber of Shipping
	Ibec	Ibec
<b>IT</b>	Confitarma	Italian Shipowners' Confederation
	Fedarlinea	Italian Association of Shipping Lines
	Assorimorchiatori	Italian Tugowners' Association
	Federimorchiatori	Italian Tugowners' Federation
	Assiterminal	Italian Association of Terminal Operators
	Assologistica	Assologistica
	Fise-Uniport	National Union of Port Companies
	Assoporti	Italian Ports Association
	Legacoop servizi	Legacoop - Services

	Angopi	National Association of Mooring Workers and Boatmen Groups of Italian Ports
<b>LT</b>	LLSA	Lithuanian Shipowners' Association
<b>LU</b>	Fedil Shipping	Fedil Shipping
<b>MT</b>	MISC	Malta International Shipping Council
<b>NL</b>	KVNR	Royal Association of Netherlands Shipowners
	Nemea	Netherlands Maritime Employers' Association
	Neptune	Maritime Employers' Association Neptune
	SMW	Social Maritime Employers' Association
	VWH	Association of Employers in Merchant Shipping
<b>PL</b>	ZAP	Polish Shipowners' Association
<b>PT</b>	AAMC	Portuguese Shipowners' Association
<b>RO</b>	OPOPC	Constanta Port Operators' Association
<b>SE</b>	SARF	Swedish Shipowners' Employer Association
	SRF	Swedish Shipowners' Association
<b>SI</b>	GIZ-ZLS	Slovenian Association of Shipowners
<b>UK</b>	UK Chamber of Shipping	UK Chamber of Shipping

**EF/16/28**

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