UNIVERSITE CATHOLIQUE DE LOUVAIN
Institut des Sciences du Travail

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

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

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INTRODUCTION

PRESENTATION OF THE STUDY

This report has been produced as part of the research into the institutional representativeness of social partners in the European Union, and the situation of trade unions and employers' associations in the candidate countries. The research has been conducted by the Institut des Sciences du Travail (Université catholique de Louvain) at the request of the Employment and Social Affairs Directorate-General of the European Commission (Call for tenders No VT/2002/83).

The issue of the representativeness of European organisations came to the fore in the context of the promotion of social dialogue. In a communication published in 1993[2], the European Commission set out three criteria determining the access that employers' and workers' organisations had to the consultation process under Article 3 of the Agreement on Social Policy. According to the terms of this communication, the organisation must: *(1) be cross-industry or relate to specific sectors or categories and be organised at European level; (2) consist of organisations which are themselves part of the social partners structures of Member States which have the capacity to negotiate agreements, and which are representative of all Member States, as far as possible; (3) have adequate resources to ensure their effective participation in the consultation process.* In 1996, it adopted a consultation document[3] that sought to bring together the widest range of views on the measures to be employed in fostering and strengthening European social dialogue. At that point, given that the social partners at European level were, and still are, in the process of structuring themselves and accepting new applications for membership, the European Commission conducted a study on the representativeness of inter-professional and sector organisations in the European Union, and in a new communication[4] in 1998, announced the measures that it proposed to take in order to adapt and promote social dialogue at European Union level. In it, the Commission reaffirmed the three criteria established by the 1993 Communication, permitting European organisations to be recognised as representative for consultation purposes under Article 3 of the Social Policy Agreement. Finally, in 2002, the Commission reaffirmed its support for a strengthening of social dialogue in its communication *The European social dialogue, a force for innovation and change*[5]. In the respect of the three criteria set up by the Commission, as has been pointed out in previous studies[6], *the changes focus on the disappearance of demands relating to the inter-sector nature of organisations and on the fact that they are established in all Member States; the new rules have not been formulated in a very restrictive manner, they only require employers' and workers' organisations to represent "several" Member States. This relaxation of the implementation condition might pose a demarcation problem in the sense that there is no criterion setting out a minimum number of Member States to activate it*.

Against this background, it is clear that one of the main issues, both for the Commission and for the European social partners, is the enlargement of the European Union and its impact on the process of social dialogue at Community level: *The Communication underlines the vital role and the weaknesses of social dialogue in the candidate countries. Much has been achieved over the past decade with the support of Community programmes and initiatives. However, a lot remains to be done to strengthen the capacities of social partners and involve them in the accession process*[7]. As far as the European Commission is concerned, it is *only with sufficiently robust national structures that the social partners will be able to participate effectively in negotiations and in other European social dialogue activities and also implement agreements at national level* [8].

The development of social dialogue, therefore, formed part of the "*acquis communautaire"(community achievement): The Treaty requires that social dialogue be promoted and gives additional powers to the social partners. The candidate countries are, therefore, invited to confirm that social dialogue is accorded the importance required and that the social partners are sufficiently developed in order to discharge their responsibilities at European Union and national level, and to indicate whether they are consulted on legislative drafts relating to the taking over of the employment and social policy acquis… Therefore, the development not only of tripartite structures but also of autonomous, representative bipartite social dialogue is*

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

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

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

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

[6] Spineux A., Walthery P. et al., *Report on the representativeness of European social partners organisations*, Report coordinated by the Institut des Sciences du Travail of the Université catholique de Louvain, for the European Commission, Directorate General for Employment, Industrial Relations and Social Affairs, Louvain-la-Neuve, 1998.

[7] *Op cit.*

[8] *Op cit.*

an important aspect for the future involvement of the candidates countries' social partners in the social dialogue activities developed at European and national level[9].

Enlargement of the European Union is a major issue from a quantitative and qualitative point of view: *The quantitative leap is quite clear as soon as the number of partners rises. The delegations taking part in social dialogue will be enlarged, and that, as we know, does not facilitate dialogue. However, the leap is also qualitative in that the new entrants present the industrial relations systems they have inherited from their national histories*[10]. By and large, most of the countries studied are notable for strongly developed tripartism, but for weakness at central bipartite level, in social dialogue at sector level, and at the level of organisations, particularly employers' associations.

The aim of the report is to produce a study that sets out both brief descriptions of the way that social dialogue functions in the countries concerned, and descriptions of the various workers' and employers' organisations involved in social dialogue at sector level. This study may be seen as a tool to help understand these quantitative and qualitative factors.

RESEARCH APPROACH AND COMMENTS ON METHODOLOGY

For the purposes of this study, a network of researchers was set up throughout the 25 European Union Member States, as well as in Bulgaria, Romania and Turkey. These researchers are experts in industrial relations and are independent of both the European Commission and employers' and workers' organisations. Each researcher was charged with drawing up a report based on a common template. A questionnaire tailored to the specific realities of the Fishing industry was elaborated to that effect. Each national report issued by the expert was submitted to the national organisations in order to enable them to make comments on collected data. The IST took charge of coordinating the study and drawing up the summaries. Constant communication and ongoing collaboration between the IST, national experts and national organisations takes place in order to associate the various players of the process of research. The report is also checked by the European organisations and their members in order to enable them to make comments on the report. This phase of consultation represents an important stage of research. Lastly, the report is checked by the European Commission's services. The IST wishes to stress its independence with regard to the political consequences and decisions which may be made on the basis of this study.

The research process, in its design, comprises a phase of collection of data on the players and the social dialogue in which they participate, but also an active approach embracing the building of a consensus, which is an integral part of the process of social dialogue itself. Thus, whereas in a good number of cases the data collected do not permit total definition of the role played by the organisations, the contacts made during the data collection and the discussions with the different players concerned should be an integral part of a process of mutual recognition[11]. The main sources used within the framework of this study are thus the social partners themselves.

Lastly, a few words on the consultation process involving the European social partners must be added. The organisations which have been consulted are cited in annex. The comments that the IST received from these organisations, and those of their members have been incorporated in different ways, depending on the kind of information received:

- The observation is directly included in the content of the report
- When a difference of opinion exists between the employers' or workers' organisation and the expert, the observation is included as a footnote in the report, as well as a brief explanation of the expert.

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

Finally, given that national situations are very changeable and evolve rapidly, it is important to stress that the aim of this study is to take "a snapshot" of the situation of the organisations in 2006. Interviews with the organisations took place, and the national reports were written, between March and April 2006 for the New Member States and Bulgaria, Romania and Turkey and between May and July 2006 for the former EU-15 countries.

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

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

[11] Reply to Call for Tenders VT/2002/83. Studies on the representativeness of the social partners at sector level in the European Union and monographs on the situation of the social partners in the candidate countries, Institut des Sciences du Travail, UCL, 2002.

NACE NOMENCLATURE[12]

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

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

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

Fish farming and aquaculture production are excluded from the list.

The delimitation is presented as an indication. However, as one of the main interests of this study is to observe the particular delimitation of the sector in each country, national experts have also referred to the national delimitation of the sector and include, in addition to the activities presented above, information on the activities which could also be part of the Fishing Industry in his/her country.

THE ORGANISATIONS TAKEN INTO ACCOUNT IN THE REPORT

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

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

and/or:

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

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

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

ABBREVIATIONS AND TERMS USED IN THIS REPORT

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

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

Density (employees): number of employees who are affiliated to the organisation concerned divided:
- by the total number of employees working in the sector within the country, if the activities of the organisation concern the whole sector studied;
- by the total number of employees working in this sub-sector within the country, if the activities of the organisation only concern a sub-sector.

Density (companies): number of companies that are affiliated to the organisation concerned divided:
- by total number of companies whose activities belong to the sector within the country, if the activities of the organisation concern the whole sector studied;
- by total number of companies whose activities belong to this sub-sector within the country if the activities of the organisation only concern a sub-sector.

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

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

Bipartite social dialogue is defined as 'a process of cooperation and negotiation between employer and workers' organisation representatives'[14].

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

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

In the text:

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

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

SOME ORGANISATIONS' ABBREVIATIONS

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

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

COMPARATIVE STUDY

1. DESCRIPTION OF THE SECTOR

1.1. Delimitation and scope of activities of the sector

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

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

Country	Activities correspond to NACE 05	Other activities included than NACE 05
Austria	Yes	-
Belgium	No	NACE 51.3; NACE 52.2; NACE 74.8
Cyprus	Yes	-
Czech Republic	Yes	-
Denmark	Yes	-
Estonia	Yes	-
Finland	Yes	-
France	Yes	-
Germany	Yes	-
Greece	Yes	-
Hungary	Yes	-
Ireland	No	Nace 05, including aquaculture
Italy	Yes	-
Latvia	Yes	Sometimes the fishing sector is not separated from agriculture
Lithuania	Yes	-
Luxembourg	Yes	-
Malta	Yes	-
Netherlands	Yes	-
Poland	Yes	-
Portugal	Yes	-
Slovakia	Yes	-
Slovenia	Yes	-
Spain	Yes	-
Sweden	Yes	-
The United Kingdom	Yes	-

Source: national reports

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

1.2. Socio-economic features of the sector

This section presents comparative data for each country on the economic weight of the sector and on employment within the sector, as well as the trends relative to number and size of the companies and trends relative to number of employees and their repartition by size of company.

The weight of the sector and the employment within the sector, compared to the economy as a whole, can be considered as a good proxy for the economic importance of the sector and data on enterprises and workers give an overview of the economic structure of the sector.

Table 2. Economic weight and employment weight by country

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

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

Source: national reports

Table 3. Companies *(trends relative to number and size)* **and employees** *(trends relative to number and repartition by size of company)* **by country**[16]

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

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

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

		•ND
Italy	•NACE 05.01: 6,719 companies •48.34% = companies with no employees 42.37% = companies with ‹10 employees	•NACE 05.01 : 23,934 employees (+10,198 self-employed) •44.12% in companies with ‹10 employees 30.04% in companies with 10-49 employees
Latvia	•NACE 05: 130 companies •ND	•NACE 05 : 1,804 employees (ND) •ND
Lithuania	•NACE 05: 216 companies •31% = companies with no employees •54% = companies with ‹10 employees	•NACE 05 : 1,290 employees (+19 self-employed) •44%-53% in companies with 10-49 employees
Luxembourg	•NACE 05: 0 company	•NACE 05 : 0 employee
Malta	•NACE 05: c.a. 25 companies •100% = companies with ‹10 employees	•NACE 05 : 128 employees (+492 self-employed) •ND
Netherlands	•NACE 05.01: 545 companies •53.8% = companies with no employees 42.86% = companies with ‹10 employees	•NACE 05 : 1,800 employees (+1,500 self-employed) •ND
Poland	•NACE 05.01: 1,206 companies •96.6% = companies with ‹10 employees	•ND
Portugal	•NACE 05.01: 444 companies •74.5% = companies with ‹10 employees	•NACE 05.01 : 4,505 employees (ND) •35.8% in companies with 10-49 employees 25.5% in companies with ‹10 employees 25% in companies with 50-249 employees
Slovakia	•NACE 05: 6 companies •ND	•NACE 05 : 2,313 employees (+28 self-employed) •ND
Slovenia	•NACE 05.01: 99 companies •92.9% = companies with no employees	•NACE 05.01 : 41 employees (+92 self-employed) •70.7% in companies with 10-49 employees
Spain	•NACE 05: 6,064 companies •55.6% = companies with no employees 28% = companies with ‹10 employees	•NACE 05 : 29,000 employees (+18,000 self-employed) •53.4% in companies with 10-49 employees 39.7% in companies with ‹10 employees
Sweden	•NACE 05.01: 1,424 companies •92,91% = companies with no employees	•NACE 05 : 282 employees (+1,323 self-employed) •92.6% in companies with ‹10 employees
The United Kingdom	•NACE 05: 3,402 companies •ND	•NACE 05 : 8,000 employees (ND) •ND

Source: national reports

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

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

2. Description of the organisations active in the sector

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

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

a) Workers' organisations

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

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

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

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

Source: national reports
* No formal recognition procedures in this country.

[18] ETF claims that the European affiliation for the “Trade Union Federation of Workers at Sea (FESMAR)” is unknown. Further to this comment and after verification, the author of the Portuguese report maintains that FESMAR is affiliated to ETF.
[19] ETF claims that SEMM is affiliated to its organisation. Further to this comment and after verification, the author of the Portuguese report maintains that SEMM is not affiliated to ETF.
[20] FSM does not negotiate or sign CAs, but SIMAMEVIP, which belongs to FSM does negotiate CAs.

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

b) Employers' organisations

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

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

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

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

Source: national reports
* Mutual recognition with a federation which does not cover fishing workers.
**They can negotiate at sector level, but this kind of bargaining is almost non-existent.
***This Federation is a special kind of organisation that cannot bargain CA since it is formed by workers and employers.

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

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

Out of the 40 workers' organisations registered in this study[21], the majority are legally and/or reciprocally recognised and bargain and sign collective agreements at sector level. Within the available data, we quoted twenty-three affiliations to ETF, eight to ETUC and seven affiliations to EFFAT.

Out of the 45 employers' organisations registered in this study[22], the same situation occurs: the majority are legally and/or reciprocally recognised and bargain and sign collective agreements at sector level. Within the available data, we quoted fourteen affiliations to Europêche, eight affiliations to COPA-COGECA, six to EAPO and one affiliation respectively to CAOBISCO, CECOP, CIAA, EAA, EHPM, FEAP, FEDOPA, FEFAC and GAM.

3. DESCRIPTION OF THE SOCIAL DIALOGUE IN THE SECTOR

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

a) Description of the tripartite concertation in the sector

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

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

[21] See the criterion to include organisations within the study in the introduction of this report.
[22] Idem.

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

Source: national reports

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

b) Description of the bipartite social dialogue in the sector

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

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

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

Source: national reports
*all agreements are at a provincial or regional level.
**CB over pay does not exist. Negotiation concerns quotas of fishing in selected areas, licences, technical measures and structural policies.
***only at sub-sector level (in the trawl fishery sector)
****only in the fish auction sector (one collective agreement)

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

NATIONAL REPORTS

AUSTRIA

Austria's territory does not include a coast. Hence, fishing takes place only on rivers and lakes. There are no official statistics on fishing. Recently, however, the number of companies and the size of employment are estimated as follows (Institut für Gewässerökologie, Fischereibiologie und Seenkunde 2006):

- Fishing (i.e. NACE 0501): ca. 150 companies with a total employment of 150 people
- Fishfarming and aquaculture production (i.e. NACE 0502): 346 companies with a total employment of around 500 people.

These figures show that fishing is almost invisible, when excluding fishfarming in line with the comparative design. In particular, it should be noted that the notion of "company" turns out to be rather grandiose on closer consideration. As the number of companies is identical with total employment, the "companies" of fishing all stand for self-employed people. Almost all of them conduct fishing only as an ancillary activity.

As a consequence of this, employees are absent in fishing as defined by the comparative design. Hence, no SD exists at sector level. Nor are sector-specific unions, employer organizations, or CB established.

Belgium

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

In terms of social negotiations, the fishing industry comes under the competence of the Joint Appeals Commission for maritime fisheries (CP 143, point 3.2.a.), which include maritime fisheries, ship-builders (with the exception of workshops for metal construction), landing and sorting of fish, the auctioning of fish in coastal fish markets and the storage of fish in warehouses in or near these fish markets. In other words, the NACE O5.01 code, on its own, does not cover the whole reality of SD in the fishing industry. According to the ONSS (Social Security) workers and employers covered by the competent joint appeals committee for maritime fisheries are included under other NACE codes, which are:

- wholesale food supplies (NACE 51.3);
- Specialist retail food shops (NACE 52.2);
- Various services supplied mainly to companies (NACE 74.8).

1.2. Socio-economic features of the sector

According to the most recent report of the Central Council for Economic Affairs (Conseil Central de l'Economie), which is a report on the development of the conjuncture in the fishing industry, October 2005, the landings from Belgian fishing vessels in Belgian and foreign ports rose by nearly 23,600 tons, with a value of 86 million Euros, in 2004 and 20,800 tonnes of that was in Belgian ports. As for fish processing, nearly 64,500 tons of fish product with a value of 371 million Euros were processed. In the same year, Belgium imported 280,300 tons of fish hand exported nearly 146,000 tons. The sales turnover for the whole of the fisheries sector (fishing, fish-farming, processing and conserving, wholesale and retail) amounted to 1.1 billion Euros, of which 132 million was for fishing itself. In terms of GDP, the fishing industry is not an important economic sector in Belgium. As an indication, the primary sector (agriculture, hunting, silviculture and fishing) only represented 0, 9 % (2,581 million Euros) of Belgian GDP in 2004. In the same year, employment in the fishery industry (fishing and fish processing) only accounted for 0, 08 % of private sector employment in Belgium. There is no data enabling the scale of the underground economy in the sector to be measured. However, the fishing industry does not have a reputation for being a « hot bed » of undeclared employment.

According to the ONSS (social security) statistics, the NACE O5.01 code concerns 107 employers and 377 workers. No employer employs more than 50 workers. Employment in the sector is almost exclusively blue collar workers (355 workers and 22 staff) and male (356 men and 11 women). According to the Central Council for Economic Affairs, Belgium had 591 recognised sea fishermen in 2004. Fish processing employed around 1,800 people. As for the associated employment, it is estimated that there are 6,000 jobs which depend on the fishing industry. Sea fishing and its associated industry are located in Flanders in the north-west of Belgium, for obvious reasons. Flanders has three fishing ports on the coast: Zeebrugge, Oostende and Nieuwpoort.

Companies (2005)

Sub-sectors	Number of companies	% companies without employees	% companies with < 10 employees	% companies with 10 to 49 employees	% companies with 50 to 199 employees	% companies with > than 200 employees
05.1	107	ND	95.3 (102)	4.7 (5)	-	-

Source: ONSS, 2005.

Workers (2005)

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ Total number of employees in the country (%)	Number of employees in companies < 10 workers/ Number of employees in the sector (%)	Number of employees in companies with 10-49 workers/ Number of employees in the sector (%)	Number of employees in companies with 50-199 workers/ Number of employees in the sector (%)	Number of employees in companies with > 200 workers/ Number of employees in the sector (%)
05.1	ND	377	0.01	85.4 (322)	14.6 (55)	-	-

Source: ONSS, 2005. According to the BNB, the private sector employed 2,743,000 people in 2005 (estimation).

There are no data on the characteristics of the employment in the sector in terms of qualifications level, wages or atypical work.

With regard to the socio-professional situation in the sector, it should be noted that the Moniteur Belge (Government publication) published a law, on the 20th June 2003, relating to the regulations for maritime contracts for maritime fishing and including improvements of the social status of sea fishermen. Prior to this, the working relationships in the maritime fishing sector were regulated by the law of the 5th June 1928, and in which « many of its provisions » no longer correspond « to present conditions » (House of Representatives, 27th March 2003). In terms of the general provisions, the law defines the terms “fishing boat”, “ship-owner”, “deep sea fisherman” and « sea voyage ». The other clauses of the law deal with: the employment of deep sea fishermen with sections devoted to the entertainment of deep sea fishermen, the employment contract, the general register of professional fishermen and the seaman’s log book. It outlines the rights and obligations of the professional fisherman and of the ship-owner, the wages of fishermen and those of the ship-owner, medical and travel costs, repatriation to domicile, termination and rupture of the employment contract.
Over the long term, maritime fishing is a declining activity in Belgium. Landings from Belgian fishing boats have fallen from 46,620 tons in 1970 to 40,129 tons in 1980, then to 37,541 tons in 1990. Between 2000 and 2004, it went from 26,522 to 23,607 tons. At the same time, the number of fishing boats fell considerably. This has been partially compensated by the increase in average capacity per boat. As for the future of the sector, the Flemish Administration considers that the European quota policy and the increase in the price of diesel fuel « do not augur well for the activities of the Belgian fleet » (De Belgische Zeevisserij. Aanvoer en Besomming 2004).

2. Description of the organisations active in the sector at national level

2.1. Description of the workers’ organisations active in the sector

In Belgium, a union organisation must be considered as a representative to be admitted to CB. Only 3 union organisations are currently recognised as representative organisations. Recognition depends on the inter-professional and not the sector criteria. Funding of union organisations is mainly through affiliated members’ subscriptions. These organisations are de facto associations.

a) The Confederation of Christian Trade Unions (Confédération des Syndicats Chrétiens/Algemeen Christelijk Vakverbond, CSC/ACV)

The CSC/ACV is a multi-industry trade union organisation at federal level. With 1.6 million affiliated members (2002), the CSC is the major trade union organisation in Belgium. CSC was founded in 1912 following the merger of two trade union associations: The Union of Christian Professional Associations of Belgium (founded in 1908 and active in Flanders) and the General Confederation of Free and Catholic Trade Union of Walloon provinces (founded in 1909). The CSC is organised at both inter-professional and professional levels. The inter-professional level, structured on a geographical basis, is composed of local sections gathered in 21 regional federations. The professional level is structured in company sections according to two criteria: the work place (the company) and the worker’s status (blue-collar worker, staff and executive). These sections are grouped into 16 professional confederations, organised at national level. These professional confederations represent the CSC within the Joint Committees, where the sector SD takes place. The CSC is a member of the European Trade Union Confederation (ETUC) and of the World Confederation of Labour (WLC).

Within the CSC, it is the professional group (*CSC/ACV Transport & Communications (CSC-Transport et Communications/ACV-Transport en communicatiesector, CSC-Transcom/ACV-Transcom),* which has competence for the maritime fishing sector. This section defends the interests of the workers in eight sectors of activity: culture, diamonds, water, the post office, the railways, communications, roads and telecommunications. It is divided into several sectors, of which one is the National Interest Group for the water sector, which has competence for inland navigation, the ports, the merchant navy and fishing. CSC-Transcom affiliates nearly 90,000 workers, of which around 700 are in the fishing sector. The exact number of employees and other workers working for the organisation (staff) is not available just for the fishing sector. Given the diversity of activities covered by this section, its affiliates can be both permanent staff and temporary workers.
This section represents the CSC within the joint appeals board which is competent for maritime fishing. Consequently, it may negotiate and conclude collective employment agreements (CEAs) at sector level. It is also this group, which on the CSC side, takes part in the SD with the maritime fishing companies. Under certain conditions, linked to its status as a union delegation, it can negotiate and conclude enterprise CEAs.

With regard to the structure of the CSC, it should be noted that, in principle, an employee is either affiliated to the General Federation of White-Collar Workers (Centrale Nationale des Employés (CNE)) or to the General Federation of White-Collar Workers-National Managers' Union (Bediende Centrale-Nationaal-Verbond voor Kaderpersoneel (LBC-NVK))[23]. However, with regard to the SD in the fishing industry, these two groups play almost no role. This is because of the very low number of workers who have the status of employee in the sector. Furthermore, they are not members of the EFT.

b) The Belgian General Federation of Labour (Fédération Générale du Travail de Belgique, Algemeen Belgisch Vakverbond FGTB/ABVV)
The FGTB/ABVV is a multi-industry trade union organisation at federal level. With a total membership of 1.3 million (2002), it is the second largest trade union organisation in Belgium. The Trade Union Commission, founded in 1898 by the Belgian Labour Party, established the Belgian General Labour Confederation. Then, in 1945, the Confederation united with several organisations that had developed illegally during WW II: the Belgian Confederation of Unique Trade Unions – with communist leanings, the Unified Trade Union Movement – lead by André Renard, and the General Trade Union of Public Services, which was the beginning of the FGTB. Like the CSC, the FGTB is structured at both inter-professional and professional levels. At inter-professional level, it is composed of 18 regional and 3 interregional organisations, which bring members together according to geographical zone. At professional level, it has 7 branch federations (branch trade unions), which groups members according to work sector and worker's status. The FGTB is affiliated to the European Trade Union Confederation (ETUC) and the International Confederation of Free Trade Unions (ICFTI).

Within the FGTB, it is the Belgian Union of Transport Workers *(Union Belge des Ouvriers du Transport/De Belgische Transportarbeidersbond, UBOT/BTB)* which affiliates the workers of the fishing industry. This group represents « all transport workers, amongst which those of the following sectors : inland navigation, the ports, maritime fishing, road transport, merchant navy etc. » It had 36,645 affiliates in 2004, of which 604 were in the framework of the fishing industry. The exact number of employees and other workers working for the organisation (staff) is not available just for the fishing sector. Membership is composed exclusively of manual workers.
This group represents the FGTB within the joint-appeals commission for maritime fisheries. Consequently, it can negotiate and conclude CEAs at sector level. It is also this group, which on the CSC side, takes part in the SD with the maritime fishing companies. Under certain conditions, linked to its status as a union delegation, it can negotiate and conclude enterprise CEAs.

[23]The CNE (150.000 members in 2005) defends the interests of white-collars and executives of the private sector in Brussels, the Walloon and the German-speaking regions. It is divided into various key sectors : trade, finance, industry, non-market, and Joint Committee 218. The LBC-NVK (294.149 members in 2005) affiliates white-collars and executives of the Dutch-speaking private sector. The CNE and the LBC-NVK are members of EMCEF and ETUC.

As is the case with the CSC, **the Belgian Union of White-Collar Staff, Technicians and managers (Syndicat des Employés, Techniciens et Cadres de Belgique/Bond der Bedienden, Technici en Kaders van België, SETCa/BBTK**)[24], which brings together employees affiliated to the FGTB, plays almost no role in the SD in force in the fishing industry. It is not affiliated to the EFT.

c) The Federation of Liberal Trade Unions of Belgium (Centrale Générale des Syndicats Libéraux de Belgique/Algemene Centrale der Liberale Vakbonden van België, CGSLB/ACLVB)

The CGSLB/ACLVB is the smallest (220,000 members in 2004) of the three multi-industry trade union organisations representing workers. The first liberal trade unions appeared round 1890. In 1930, they merged to create CGSLB. Unlike the FGTB and the CSC, CGSLB was established on mainly a regional basis. The exact number of employees and other workers working for the organisation (staff) is not available just for the fishing sector. It affiliates workers, salaried staff and civil servants. According to the information obtained, the CGSLB has very few affiliates in the maritime fishing sector.

The organisation has the power to negotiate and sign agreements at this level for the sector. At the company level, it also has the power to negotiate and sign agreements at this level for the sector, but the exact number of collective agreements signed by the organisation at this level for the sector is not available.

It is an inter-professional and federal organisation. It is not a member of any other organisation at national level.

From a « formal » point of view, it participates in the SD in the same way as the CSC and the FGTB. The difference between the 3 organisations is their relative strength, which depends to a great extent on the number of affiliates.

Workers' organisation(s)

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
CSC/ACV CSC/ACV Transport & Communications	1,600,000 90,000	+/- 700	ND*	yes	ETF	ITF
FGTB/ABVV UBOT/BTB	1,300,00 36,645	604	ND*	yes	ETF	ITF
Federation of Liberal Trade Unions of Belgium	200,000	ND**	ND	yes	ETF ETUC	ICFTI

Source: Workers' organisations (2006).

*The data supplied by the ONSS (social security) are not sufficiently reliable to calculate a density rate.

** According to the information obtained, the CGSLB has very few affiliates in the maritime fishing sector.

[24] The SETCa (343,000 members in 2004) represents all white-collar workers, technicians and operatives in the private sector, teachers and administrative workers in secular education, blue-collar workers and workers in books, graphic arts and the media. It is organised into the following key sectors: trade, finance, industry, the non-market sector, logistics, information and communication, Joint Committee 218, and other sectors. SETCa is member of EMCEF.

2.2. Description of the employers' organisations active in the sector

On the employers' side, there are two organsiations which are legally recognised as being representative of the employers in the maritime fishing sector. Consequently, they have their seats on the joint-appeals commission for maritime fishing, where they negotiate and conclude sector based CEAs (see point 3.2. a.1.).

a) The Professional Association of Belgian Ship-owners (Centrale des armateurs-association professionnelle des armateurs belges[25]/Rederscentrale-Beroepsvereniging van de Belgische Reders)

This organisation was set up in 1950 with the intention of creating a mechanism for market regulation. It affiliates nearly 100 ship-owners. The biggest ship-owner member of the Association of Ship-owners (Rederscentrale) owns 3 boats. The Rederscentrale is a co-operative. It employs 4 people.

In Belgium, it is a member of de Unie van Zelfstandige Ondernemers (UNIZO), the Flemish organisation which represents the world of the self-employed and small companies, as well as the Boerenbond.

b) Professional Association of Wholesale Fish Traders (association professionnelle des commerçants en gros de poisson[26]/Beroepsvereniging der Visgroothandelaars van Belgïe)

This federation has 15 member companies, which are wholesalers. Apart from one company which employs around 250 workers, the other members of this federation are small companies. This federation is an ASBL (registered charity). It has no employees. It is not a member of any other organisation. No further data on this organisation is available.

Employers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
The Professional Association of Belgian Ship-owners	100	ND	ND*	Yes	EAPO EUROPECHE	-
Professional Association of Wholesale Fish Traders	15	ND	ND	Yes	-	-

Source : Declaration from employers' organisations (2006).

* The data supplied by the ONSS (social security) are not sufficiently reliable to calculate a density rate.

3. Description of the SD in the sector at national level.

3.1. Description of the tripartite concertation in the sector

In Belgium, the SD is essentially bi-partite as opposed to tri-partite. In the fishing sector, one cannot speak of organised tripartite concertation, in the strict sense of the term. However, it should be noted that there is a tripartite consultative commission for the Federal authorities. The effective line of conduct is that of the autonomy of the social interlocutors with respect to the political

25 The translation in French and English is not official.

26 The translation in French and English is not official

participant. In other words, to repeat the terms used recently in the press by certain social interlocutors, social concertation is « their business » rather than that of the « politicians ». However, at the federal and inter-professional level, this line of conduct does not exclude the existence of tripartite concertation on certain subjects such as employment and the competitiveness of companies. It should also be stated that the intensity of tripartite concertation varies according to the occasion and the issues at stake. With regard to the fishing industry, there is no organised tripartite concertation in the strict sense. Nevertheless, we should not forget that the social status of the maritime fisherman today is the fruit of legislative work carried out by parliament in concertation with the social interlocutors of the sector.

3.2. Description of the bipartite SD in the sector

a) At sector level

In general, the social partners have tended to favour sector SD compared to the other levels of dialogue. Only members of organisations representative of the employers and workers can occupy seats in the Joint Committees[27]. Members of the workers' organisations can only be representatives designated by CSC/ACV, FGTB/ABVV and CGSLB/ACLVB. As for the Employers' Organisations, to sit in a CP (Joint Committee), they must be recognised as being representative by the Minister concerned.
The fact of having a seat in the joint committee enables the organisations, but does not make it an obligation, to negotiate and conclude collective employment agreements, which are valid at sector level. The law provides that a sector collective employment agreement can be made obligatory for all the workers and employers of the sector if the signatory organisations ask for extension. Without such a request, a sector agreement only applies to the members of the signatory organisations.
It should also be noted that the sector negotiations take place within the inter-professional negotiations on inter-professional agreements. These agreements, which are negotiated every two years, are valid for the whole of the private sector. The last inter-professional agreement was made in February 2005. It covers the years 2005 and 2006.

It is within the framework of the joint appeals committee for maritime fishing (CP 143) that the SD takes place in the fishing industry. It is competent for workers whose occupation is « of a primarily manual nature and their employers, particularly for ship-owners and personnel manning maritime fishing boats; the personnel employed at the quayside by shipbuilding companies, with the exception of employees in metal construction workshops for these ships; employers and employees who look after the unloading and sorting of the catch; all the fish merchants and buyers in the coastal fish markets and their employees working in their warehouses in or near these markets. »
From 2000 to 2005, 31 collective employment agreements were concluded in the framework of this CP, with around half of them being concluded for a limited duration. Extension was requested for 24 of these agreements, which implies that they are valid for all workers and employers who come under this CP[28]. They were particularly concerned with end of year bonuses, the statutes of the fund for security of existence, the guaranteed minimum daily wage, professional training, the linking of wages to the index and pre-retirement.
The mandates of this CP are held by the following:
- *The Professional Association of Belgian Ship-owners:* 3 actual members and 3 substitute members;
- *Professional Association of Wholesale Fish Traders*: 2 actual members and 2 substitute members;
- CSC/ACV, represented by the group CSC/ACV Transport & Communications: 2 actual members and 2 substitute members;
- FGTB/ABVV, represented by the UBOT/BTB: 2 actual members and 2 substitute members;
- CGSLB/ACLVB: 1 actual member and 1 substitute member.

[27] art. 3 of 5 December 1968's law.
[28] This does not prevent the fact, in certain cases, that the field of application of a sector CEA may be reduced to a particular segment of the workers and employers which come under the JC. Thus, in the case of the CP 143, the field of application of several CEAs was limited to, for example, the ship-owners or the fish warehouses and auctions.

No organisation external to the CP 143 was identified as playing an active role in the SD underway in the sector. The SD underway in this CP can be considered relatively « normal » compared to the sector SD conducted in Belgium and the size of the implied sector. During recent years, a part of the SD consists of translating the law of the 3rd May 2003 concerning the social status of the maritime fisherman into a CEA (Collective Employment Agreement).
The CP 143 is only valid for workers in the maritime fishing sector. As for the employees, they come under the National Auxiliary Joint Committee for Employees (CPNAE) (CP 218). The CPNAE covers white-collar workers whose employers are not attached to any particular Joint Committee. It currently deals with 30 sub-sectors, 50,000 enterprises, and 350,000 workers. According to the statistics produced by its information centre, the « fishing, fish-farming and aquaculture » sector (code NACE 05) which come under the CPNAE was only relevant to 40 employees in 2000, spread between 12 employers, which is to say less than 0,1 % of the employees and employers concerned by this CP.
According to the unions, the rate of unionisation in the framework of the CP 143 is estimated to be nearly 85 %.

There are no data available on the players' positions with regard to future developments in the SD at sector level in the Fishing Industry and on the evaluation of the bipartite SD at sector level (e.g. possible obstacles to its development, possible promotion of it, etc.)

b) At company level

Social negotiation is almost non-existent at the company level in the sector. This is mainly due to the size of the companies in the sector and the willingness to encourage sector negotiations. The number of workers necessary to set up a trade union delegation is 50. Only one company, coming under the CP 143, has a union delegation, which considerably limits the existence of a SD at enterprise level. The two key players are the employer and the union delegation. At enterprise level, and from a general point of view, it is traditional that a CEA should be signed by all the representative organisations.

Comment

The fishing industry is not a particularly highly developed sector, both in terms of economics and employment. The enterprises in the sector are small. Only four of the enterprises which come under the code NACE O5.1 employ between 10 and 50 workers. A Joint Committee has competence for maritime fishing. If collective agreements are concluded regularly in this Joint Committee, it should be noted that they only apply to the manual workers. The few staff employed in the sector are covered by the Joint Committee (CP) 218. At enterprise level, social negotiation hardly exists at all. Finally, we would like to underline the fact that, over recent years, the present social situation in the sector has been greatly influenced by the passing of the law on the status of the maritime fisherman.

CYPRUS

1. Description of the sector's characteristics at national level[29]

1.1. Delimitation and scope of activities in the sector

In Cyprus, the activities covered by the Fishing Sector correspond to code B:05 of the NACE Rev. I. In particular it covers the following activities (NACE 05.01 and 05.02): Fishing (ocean and coastal) and Operation of fish hatcheries and fish farms. The processing and preserving of fish and fish products (code DA 15.2 of NACE Rev 1) is classified under Manufacturing.

From the point of view of the employers' and workers' organisations the activities included are those pertaining to NACE 05.0. It excludes the processing and preserving of fish and fish products. As regards collective agreements, these cover the activities in NACE 05.0. However, as far as trade unions are concerned, these activities are part of a larger group of activities that they deal with (e.g transport and agricultural workers and allied occupations).

1.2. Socio-economic features of the sector

The Fishing Sector (NACE 05.0) is one of the smallest sectors of the economy of Cyprus. In 2003, its annual contribution to GDP at current market prices was 12.2 million Cyprus pounds or 0.3% of GDP, employing 1,300 people (full-time equivalent). Fish caught amounted to 3599 tons. In 2005 there were 565 enterprises employing 1254 people (full-time equivalent).

Workers (Year 2005)

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector*	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
05.01	534	560	0.21	100.0	0	0	0
05.02	13	147	0.05	37.4	62.6	0	0
Total	547	707	0.26	87.0	13.0	0	0

*It includes "working partners ", i.e. people who go with and assist the owner of the fishing vessel in fishing. Their remuneration comes from the sharing of the fish caught with the owner.
Source: Computed from secondary data from the Statistical Service of Cyprus.

Companies (Year 2005)

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies with 10-49 employees	% companies with 50-249 employees	% companies with › 249 employees
05.01	546	102	444	0	0	0
05.02	19	0	12	7	0	0

[29] The sources of data are annual returns from the Department of Fisheries and Marine Research of the Ministry of Agriculture, Natural Resources and Environment and import and export statistics. In addition the Department of Fisheries and Marine Research, publishes on an annual basis, detailed information on the fishing craft (by type, capacity, production), production (by source, species and value), fish landings (by quantity, species, area and value) and related data. The data refer to the sector's activities in the Government controlled areas, excluding the areas under Turkish occupation since the Turkish invasion of Cyprus in July 1974.

Total	565	18 (102)	80.7 (456)	1.2 (7)	0	0

Source: Statistical Service of Cyprus and the Department of Fisheries and Marine Research of the Government of Cyprus.

The sector is characterised by the small size of enterprise. 18.0 % of enterprises employ 1 person, 74.2% employ 2 people, 2.5 % employ 3 people, 4.1 % employ 5-9 people and 1.2 % employ 5 people or more. The average enterprise size has declined from 4.5 people in 1990 to 2.2 in 2005. This is attributed to the modernisation of the fishing fleet including larger trawlers which are less labour intensive. There are no government enterprises. Of the labour force in the sector, 43.6% were owners and family members, 31.3 % were working partners and 25.1 % employees. Women accounted for 2.5% of the total full-time employment in the sector. Foreign workers accounted for nearly 60% of employees.

In the Census of Population 2001, the occupational structure of the labour force in the Fishing Sector was 80.0% fishery workers, 2.8% technicians and specialised staff, 3.6% clerical and related workers, 1.5% professionals, 2.2% managerial, 5.9% unskilled labourers, and 4.0 % other occupations. The educational level of the labour force, based on the 2001 Census of Population was: 26.8% completed Lyceum (6 years secondary), 16.0% gymnasium (3 years secondary), 36.4% primary school, 5.9% post-secondary, 7.2% university, and 7.7% had education below full primary level.

As regards, geographical distribution, most, enterprises (97.1%) were in the coastal areas and 2.9 % were inland (fish hatcheries).

No accurate figures on the shadow economy in the sector are available but it is reckoned to be relatively small and is attributed mainly to under- reporting by firms.

The Cyprus fishing fleet consists of 701 Vessels of total capacity 6070 G T.Of these 620 are inshore fishing vessels <12 m (500 professional and 120 semi - professional), 60 coastal fishing vessels > 12m(multi-purpose vessels) and 21 bottom trawlers.

The distribution of output (gross output at current prices) of the sector in 2003 was 43.4% sea fishery (30.0 % inshore fishery and 13.4% trawl fishery), 54.8 % marine aquaculture (32.1 fish, 8.8% fry, 4.0 % shrimp) and 1.8% inland waters aquaculture (trout). Imports of fish (excluding tinned fish) amounted to C£3.4 million in 2003 accounting for about a fifth of total demand. The sector has been exhibiting a significant rate of growth over the last decade, with the index of quantity production rising from 100 units in 1995 to 180.2 in 2000 and 163.5 in 2003. During the same period the price index dropped from 100.0 units in 1995 to 80.8 by 2000 and 95.9 in 2003.

The fisheries sector is currently facing problems of competitiveness, productivity, mainly due to limited resources, and inadequacy in modernisation, technology and management methods. These problems arise mainly from the overexploitation of some fish stocks such as demersal species, the ageing fleet, the uncertainty which fishing is carried out in international waters, and the continuing problems of mooring of fishing vessels and the lack of suitable facilities for the landing of fish catches. The Government of Cyprus has a policy to develop, enhance and modernise the Fisheries sector in order to make it competitive, commercial and sustainable, to provide high quality products and successfully meet European and international competition. The modernisation of the operational structures and institutions of the sector will be in accordance with the requirements of the EU Common Fisheries Policy. Cyprus participates in the Single Programme Document for Fisheries of the EU covering the period 2004-2006.

2. Description of the organisations active in the fishing sector at national level[30]

2.1. Description of the workers' organisations active in the sector

a) FEDERATION OF TRANSPORT, PETROLEUM AND AGRICULTURAL WORKERS OF CYPRUS (SEK) (FTPAW) / OMOSPONDIA METAFORON, PETRELEOEDON KE GEORGIAS KIPROU (SEK) (OMEPEYE)

It was created and registered in 1963 as a Trade Union with the Ministry of Labour and Social Insurance. Its members are employees in transport, petroleum and agriculture (including fisheries). Its funds come mainly from the subscription of its members, amounting to 1% of their gross emoluments. It has a full-time staff of 7 people. Its membership is about 6000 people (of which about 5000 are blue collar workers, 800 white collar employees and 200 managerial and supervisory staff). Of these employees 4500 are in transport (road transport, seamen, port-workers, air-transport workers), 500 in petroleum and 1000 in agriculture (of which 50 in fisheries). As regards fishing, it accounts for about 37% of local employees in the sector. The union holds elections every 4 years at General Congress which is attended by about 200 representatives (1 for every 30 members) and a 5 member executive committee is elected by majority vote.

It is legally recognised on the basis of its registration with the Registrar of Trade Unions at the Ministry of Labour and Social Insurance. It takes part in consultations at sector, higher than enterprise and enterprise level. It can negotiate, and sign collective agreements at all levels. However, in the fishing sector collective agreements are confined to the enterprise level. At present it has 2 agreements active in the sector.

It also participates in tripartite concertation but so far it has not been necessary to sign any collective agreements in this framework, for the fishing sector.

At the national level it is part of the Cyprus Workers Confederation (SEK).

b) CYPRUS AGRICULTURAL, FORESTRY, TRANSPORT, PORT, SEAMEN AND ALLIED OCCUPATIONS TRADE UNION (PEO) / SYNTEHNIA ERGATOEPALLILON GEORGIAS, DASON, METAFORON, LIMENERGATON, NAFTERGATON KE SYNAFON EPANGELMATON KIPROU, PEO (SEGDAMELIN - PEO)

It was first established and registered as a trade union with the Registrar of Trade Unions in 1947 by the amalgamation of the District Transport Trade Unions (created between 1940-44) under the name, Cyprus Trade Union of Transport Workers and General Workers. In 1996, its name was changed to Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Unions, PEO by the amalgamation of the Pancyprian Trade Union of Transport, Port, Seamen and General Workers and the Cyprus Trade Unions of Agricultural Workers, Forestry and General Workers (PEO). These trade unions were the result of the amalgamation of various trade unions in corresponding branches, some of which were established as far back as 1940. It has a membership of about 6060 people of which 590 are in road transport; 1450 in agriculture, forestry and poultry and animal husbandry; 150 port-workers; 1710 seamen; 550 in beverages; 1610 in other related activities(of which 70 in fisheries). Its membership is mainly composed of skilled and semi-skilled workers. Its membership in the fishing sector accounts for about 52 % of all local employees in this sector. Its funding comes mainly from subscriptions, 1% of gross emoluments of its members. It has a full-time staff of 10 people. It holds elections every 4 years at its General Congress, whereby a 31 member Central Committee is elected and from which an Executive Council of 11 members is elected. The majority vote is observed at each stage of the election procedures.

It is legally recognised on the basis of its registration with the Registrar of Trade Unions of the Ministry of Labour and Social Insurance. It participates in consultations at sector, higher than the enterprise and the enterprise level. It can negotiate and sign collective agreements at all levels. In the fishing sector, the collective agreements are at enterprise level. At present it has 8 collective agreements operational in the sector.

At the national level, it is part of the Pancyprian Federation of Labour (PEO).

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[30] On the basis of the sector's activities a number of professional associations were established in dealing, mostly with the interests of the various enterprises and regulatory and administrative issues in the sector but not with CB. These include the Multipurpose Fishing Vessels Association, the Coastal Fishing Association, the Association of Fish Farmers, the Cyprus Mariculture Association and the Bottom Trawl Fishery Association. Some of these are affiliated to the Cyprus Chamber of Commerce & Industry. Also the various farmers' organisations such as the Panagrotikos Farmers Union, The Cyprus Farmers Union (PEK), the Union of Cypriot Farmers (EKA), the Agrotiki Farmers Union, do participate in discussions for the development and regulation of the fishing sector, as it generates income and work opportunities, especially for the rural population.

Organisation (English name)	Members		Estimation of the density*	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Federation of Transport, Petroleum and Agricultural Workers of Cyprus (SEK)	6,000	50	37%	yes	ETF EFFAT	IUF ITF
Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union (PEO)	6,060	70	52%	yes	-	IDC TUI

*It is estimated that the total number of local employees in the fishing sector is about 134.The densities are calculated using this figure. Foreign employees are excluded from this as they do not belong to a trade union. They are employed on a contract issued by the Department of Civil Registration and Migration of the Ministry of the Interior. Also excluded are the working partners, who do not belong to a trade union and are not strictly speaking "employees".

2.2. Description of the employers' organisations active in the sector

There are no employers' organisations in the fishing industry in Cyprus. The Cyprus Employers and Industrialists Federation (OEV), the Cyprus Chamber of Commerce and Industry(CCCI), the various professional organisations which the enterprises may be affiliated provide advice and information to its members in this sector to conclude collective agreements.

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

There is no special tripartite concertation for the fishery sector. However if the bipartite SD does not reach an agreement in an enterprise, then the parties concerned can proceed to tripartite concertation under the chairmanship of the of the Ministry of Labour and Social Insurance. In the Fishing sector, there have been no such cases so far.

3.2. Description of the bipartite SD in the sector

a) At sector level

There is no collective bargaining in the fishing industry at sector level.

b) At company level

CB in the Fishing sector only takes place at company level. The parties participating in the dialogue are the managers/owners of the enterprise and representatives of the trade unions. The employer may be assisted in the negotiations by representatives of the Cyprus Employers and Industrialists Federation (OEV) and the Cyprus Chamber of Commerce and Industry (CCCI) and the professional association that an employer may belong to. There is an obligation to participate in CB at company level in accordance with the Industrial Relations code, operating in Cyprus, which all social partners have to follow. There are no conflicts between players regarding recognition issues.

There are 10 signed collective agreements which remain in force at present. These collective agreements cover small companies. There are no medium or large companies in the fishery sector. The content of these agreements include wages, pay systems and other conditions of employment and work specific provisions in the recently enforced new EU harmonised labour legislation, that ensures that collective agreements are amended so that provisions which are contrary to this new legislation are effectively removed. The duration of collective agreements in the fishing sector is usually for 2-3 years. The types of workers covered by these agreements refer to nearly all employees of an enterprise, excluding managerial employees. The share of enterprises in the sector covered by collective agreements is estimated at 80 %., for enterprises engaging local employees. The share of employees in the sector covered by collective agreements is estimated at 90 %., for local employees (excluding working partners). There are no formal ways of extending collective agreements to parties that are not signatories to the agreement, but usually employers adopt these agreements, since, otherwise, employees may leave them for better employers.

With regard to future developments in the SD at enterprise level it is likely that the content of these agreements will be modified to include changes in the provisions regarding the cost of living allowance and welfare benefits, extension of the retirement age, the legality of collective agreements as well as safety, health and environmental conditions at work.

Although they may not be officially part of the negotiating process in collective agreements, various farmers' organisations, the Department of Fisheries and Marine Research of the Ministry of Agriculture, Natural Resources and Environment, the Ministry of Commerce and Industry and the various professional associations in the sector may be regarded as playing a role in industrial relations in the fishery sector.

There is no multi-employer bargaining in the fishery sector. The obstacle to the development of partite SD at sector level is that the sector is dominated by self-employed people and the small size of the enterprises. There is no promotion of the bipartite SD at sector level.

Comment

The fishing sector in Cyprus is relatively small in terms of value added contribution to GDP, employment and domestic exports. It is dominated by the small enterprise units. However it is an important activity of the economy of several coastal areas since it generates income and work opportunities, contributing to the social and economic welfare of these areas. It has been expanding at relatively good rates. Industrial relations are at enterprise level. There are no collective agreements at sector level in the fishing sector, because the sector consists mainly of self-employed people and the other enterprises are relatively small. This holds also for tripartite concertation. The problems faced by the sector pertain to competitiveness and productivity as a result mainly of limited resources and inadequacy in modernisation, technology and management methods.

Abbreviations

SEK= Cyprus Confederation of Workers (Sinomospondia Ergaton Kiprou)
PEO = Pancyprian Federation of Labour (Pankipria Ergatiki Omospondia)
CCCI = Cyprus Chamber of Commerce and Industry (Kipriako Emporiko ke Viomihaniko Epimeliterio)
OEV = Cyprus Employers and Industrialists Federation (Omospondia Ergodoton ke Viomihanon Kiprou)

CZECH REPUBLIC

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

One of the fundamental economic classifications used for statistical purposes in the Czech Republic is called Sector Classification of Economic Activities (Odvětvová klasifikace ekonomických činností, OKEČ), introduced into statistical practice in 1994. Units/economic entities are entirely based on the EC's classification system NACE. In the case of Section b – Fishing and Fish Farming, however, SCEA only has four-tier categorisation (undoubtedly because the Czech Republic is a landlocked state and has no access to sea fishing), but its content corresponds to NACE 05 (up to the 4th tier).

This is mainly true because the business of enterprises in the sector covers activities corresponding to both 05.01 and 05.02. What is more, a number of firms operating in the sector invest in fish processing, develop processing enterprises and simultaneously breed poultry etc., which broadens their economic activity beyond the framework of the fishing sector. The situation is not entirely clearly defined from the point of view of the organisations either. While employers in the sector are usually members of various professional associations operating in the sector these are often citizens' associations which do not function as employers' organisations. Most of the trade union organisations concerned include large numbers of members from other sectors.

1.2. Socio-economic features of the sector

The Fishing, Fish Farming and Related Activities sector is a very small sector of the national economy in terms of the number of employees; the sector is therefore not very significant for employment.

Characteristics of the sector (NACE 05)

Year	2001	2002	2003	2004
average registered number of employees (individuals)	1731	1741	1773	1720
average monthly wage per person (CZK)	12 360	13 279	14 227	14 932
gross added value at current prices (CZK thousands)	590	669	456	469
gross added value as a % of total gross added value in the national economy at current prices	0.03	0.03	0.02	0.02

Source: Czech Statistical Office calculations supplied to order, RILSA calculations

The share of total employment makes it impossible to specify detailed characteristics of workers in the sector, such as sex, education, profession, the nature of employment contracts in the sector and whether work is part-time or full-time[31]. According to our estimates, this sector, like agriculture, is dominated by workers with basic education and with low skill levels, chiefly in the 6th ISCO group. The average wage in the sector has for long been below the national average (to illustrate: in 2003 the average wage in the national economy was CZK 16,920, i.e. EUR 531[32]; in 2004 it was CZK 18,035, or EUR 565).

[31] These characteristics are identified in regular Labour Force Surveys by the Czech Statistical Office, where the methodology used cannot guarantee results within the statistical error margin for such a small number of employees.

[32] Yearly average exchange rate for 2003 from the database Czech National Bank (31.844 per EUR in 2003 and 31.904 per EUR in 2004). Source www.cnb.cz.

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	542[33]	1,720[34]	0.04[35]	ND	ND	ND	ND

Source: CSO.

A total of 627 enterprises were active in the sector as at 31.12.2005. Self-employed people and organisations without employees make up a substantial proportion of these (respectively 542 people = 86% and 47%). Commercial companies were only 56 (= 9%) and cooperatives, state firms, etc. were 29 (=5%).

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Total of the sector	627[36]	(292) 46.57[37]	(62) 9.89[38]	ND*	ND*	ND*

Source: Register of Economic Subjects of the Czech Statistical Office (CSO).
*number of employees working in companies with 10-100 employees is 28 (=4.47%). Only 0.48% work in companies with more than 100 employees, while 242 employees (=38.60%) are not stated.

The sector's share of the total number of units operating in the national economy is very small (there was a total of 2,102,948 active units in the national economy as at 31.12.2005). In terms of value added, the sector's proportion is practically negligible compared to other sectors of the national economy. The entire sector has been privatised. The dominant company structure is that of the Czech self-employed status. Given the nature of sector output and in view of the information obtained from interviews with representatives of the social partners, it is reasonable to judge that the grey economy is small in this sector.

2. Description of the organisations active in the sector at national level

There is no employers' organisation in the sector (the employers are not even members of employers' organisations representing employers' interests in the agriculture sector). In contrast, the vast majority of trade union organisations are members of the Union of Workers in Agriculture and Foodstuffs – Association of Free Trade Unions of the Czech Republic (Odborový svaz pracovníků zemědělství a výživy - Asociace svobodných odborů České republiky, OSPZV-ASO ČR ČR). There, however, these organisations are heavily outnumbered by both purely

[33] Date: 31.12.2005.
[34] Date: 2004
[35] Ditto.
[36] Date: 31.12,2005.
[37] Ditto.
[38] Date: 31.12.2005.

agricultural trade unions and member organisations from other sectors. We have also registered a change in membership of one trade union organisation operating as an employer whose business activities qualify it as part of the fishing sector. This was a move by a member of OSPZV-ASO ČR ČR to the Trade Union of Workers in Woodworking Industry, Forestry and Management of Water in the Czech Republic[39] (Odborový svaz pracovníků dřevozpracujících odvětví, lesního a vodního hospodářství v České republice, OS DLV), which took place in 2005 – from the point of view of sector pertinence, however, it is somewhat non-standard for a sector 05 organisation to be a member of OS DLV.

2.1. Description of the workers' organisation active in the sector

The Union of Workers in Food and Agriculture – Association of Free Trade Unions of the Czech Republic[40] / Odborový svaz pracovníků zemědělství a výživy - Asociace svobodných odborů České republiky (OSPZV-ASO ČR ČR).

According to information from OSPZV-ASO ČR, the Association was established on 19 February 1990, originally called the Trade Union of Workers in Food and Agriculture of Bohemia and Moravia (i.e. even before the break-up of Czechoslovakia it was founded on a national and not a federal basis). In the beginning, the Association had a base of over 300,000 members, making it one of the biggest trade union formations in the Czech Republic. The transformation of the agricultural sector and other factors[41], which followed, caused (as in other sectors) a fall in the number of workers who are trade union members, so the Association was compelled to open its doors to workers from other sectors as well. That was also the reason for the change of name in 1997. OSPZV-ASO ČR is an independent, autonomous and voluntary organisation of employees and people in training for employment and possibly other citizens aged over 15, who wish to take part in the Association's activities. OSPZV-ASO ČR operates throughout the Czech Republic but is based in Prague. Besides the standard trade union agenda, the Association provides legal counselling regarding employment relations, free representation in court in labour disputes, wage advice, consulting and advice in the area of social, health, sickness and pension insurance and supplemental pension insurance, tax advice, and occupational health and safety advice. The Association offers trade union organisations assistance in CB in enterprises and support in negotiating collective agreements, advice regarding the formation and use of social funds, the conducting of conciliatory talks with employers, free health and safety inspections of workplaces and enforcing the elimination of any shortcomings found, the organisation of professional training, and recreation in the Association's recreation facilities. OSPZV-ASO ČR publishes a monthly newsletter called Agros-bulletin. Membership dues are 1% of net wages[42]. OSPZV-ASO ČR and trade union organisations operate financially according to the Association's directives; they may operate as independent enterprises and take part in the enterprise activities as a legal entity or as an individuals, provided they have the prior consent of the Central Committee of OSPZV-ASO ČR. Membership of the trade union association[43] is not conditional on work in agriculture or the processing industry, so its members are trade union organisations operating in a wide range of fields, e.g. food production, construction, the automobile industry, chemicals, and in organisations operating in private security agencies, apprenticeship schooling etc. Members from non-agriculture sectors form approximately 40% of the Association's membership base. The membership base, numbering approximately 90,000 members at present, also comprises the vast majority of trade union organisations operating in the Fishing Industry sector: 14 basic trade union organisations with a total of 780 members. The Association originally affiliated all trade union organisations operating in the sector, but in the 2nd half of 2005 a trade union organisation operating in an enterprise called Chlumec nad Cidlinou Fish Farming (Rybářství Chlumec nad Cidlinou) left OSPZV-ASO ČR to join the aforementioned OS DLV (with all 42 members). In terms of full-time work, the Association employs approximately 50 people[44]. The membership base is

[39] See J. Hála, A. Kroupa, Forestry and wood workers' union issues strike warning, EIRO 2004.

[40] Source: OSPZV-ASO information obtained from an interview with a representative of the Association; the Association's official website does not give an English name for the Association. The EIRO website uses a different English version of the Czech name, based on a translation from Czech to English: Association of Agriculture and Food Workers – Association of Free Unions of the CR.

[41] For information on the decline in membership of most trade union federations in the Czech Republic and the reasons for this development see: J. Hála, A. Kroupa, Factors Constraining SD and the Social Partners' Influence Examined, EIRO 2004

[42] Source: OSPZV-ASO.

[43] Ditto.

[44] Source: OSPZV-ASO.

not defined professionally (blue-collar workers or white-collar professions), in terms of qualification requirements, from the point of view of the superiority or inferiority of job positions etc.; Association members cut across all these categories[45].

Czech law does not require trade union organisations to undergo any kind of recognition procedures for CB and such procedures do not form standard practice in CB. The decisive factor is the legal competence of the organisation and body concluding the collective agreement[46], and, in practice, the actual existence of the necessary social partner or its willingness to conduct SD and CB[47]. By law, CB and the conclusion of a collective agreement may be done, for the trade union side, by a representative of the appropriate trade union body so authorised by its statutes or its internal regulation. OSPZV-ASO ČR takes part in CB at sector level (primarily in the agriculture sector). None of the HLCAs it has concluded apply to the Fishing Industry sector, however (employers in the Fishing Industry sector are not members of any of the employers' organisations that negotiated the HLCAs). In the Fishing Industry sector, the Association does not conduct CB at sector level owing to the absence of the necessary partner (employers' organisation)[48]. CB at enterprise level takes place between an employer and the appropriate trade union organisation (operating at the employer). At the request of a member organisation that conducts bargaining, the Association may provide support for the negotiations (information, consulting etc.), and possibly (particularly if the employer permits) Association officials or assigned experts may personally take part in the talks. Neither OSPZV nor OS DLV concludes enterprise-level collective agreements in the Fishing Industry sector[49].

OSPZV-ASO ČR is a founder member of the second biggest trade union federation in the Czech Republic: the Association of Independent Trade Unions (Asociace samostatných odborů, ASO). [50]

Workers' organisation(s)

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
The Union of Workers in Agriculture and Alimentation – Association of Free Trade Unions of the Czech Republic	cca. 90,000	cca. 780	780/l,720 = 45%	No	EFFAT	-

Source: OSPZV-ASP, February 2006.

2.2. Description of the employers' organisations active in the sector

There are no employers' organisations in the Fishing Industry sector.

[45] Ditto.

[46] In particular the manner of its founding, which must conform to the relevant legislation.

[47] For more information see the aforementioned study published by EIRO in 2004 and the EIRO comparative study on changes in the national CB systems since 1990 – case of the Czech Republic.

[48] Source: OSPZV-ASO.

[49] Ditto.

[50] In the Czech Republic.

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

No tripartite platform exists in the Fishing Industry sector and no tripartite talks take place[51]. The main reasons for this are without doubt the relatively small scale of the sector and the absence of an appropriate sector representation of employers.

3.2. Description of the bipartite SD in the sector

a) At sector level

For the reasons set out above (the non-existence of a bargaining partner on the part of employers) SD is not practised in the sector at sector level and there is no CB at higher-than-enterprise level. Trade union organisations that are members of the aforementioned trade unions do not, on the grounds of this membership, take part in CB conducted by the trade unions in question. That means that, according to the available information[52], no extensions of HLCAs negotiated in related sectors (e.g. agriculture, possibly forestry or water management) to firms operating in the Fishing Industry sector can be expected either, as any such initiative by the social partners would probably come into conflict with the applicable legislation (different sector of activity of the actors).

b) At company level

SD and CB function solely at enterprise level. It takes place between the employer and the appropriate trade union organisation operating at his company. OSPZV-ASO ČR (or OS DLV) may provide support to its member organisations during these talks. There is no obligation to participate in CB at company level in general, either in law or anywhere else. On the other hand, the statutory rules for CB[53] do not allow an initiative by one of the partners to go unheeded – the counterparty is obliged to give a written answer to a proposal without undue delay, giving its opinion on those parts of the proposal that were rejected. The parties are also required to negotiate and cooperate with each other as requested, unless that would go against their legitimate interests. They are also obliged to start talks on a new collective agreement no later than 60 days before the existing collective agreement expires. Because the key criterion for CB is the legal competence of the social partners and their willingness to negotiate, conflicts between players regarding recognition issues do not occur. There have been good experiences with SD in the Fishing Industry sector, according to OSPZV-ASO ČR.

At present a total of 13 collective agreements are in effect in the Fishing Industry sector; one enterprise-level collective agreement is imminent[54]. They concern mainly SMEs[55]. The content of enterprise-level collective agreements concluded in the Fishing Industry sector can be regarded as standard; we have no information suggesting the existence of any provisions specific to the given sector[56]. The collective agreements are usually concluded for a period of one year[57]. Enterprise-level collective agreements cover all employees in the companies that concluded these agreements. It is a reasonable estimate that these are mainly blue-collar workers[58]. The share of companies in the sector covered by a company collective agreement is as follows: ((12[59] + 1[60]))

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[51] Source: OSPZV-ASO.

[52] Source: OSPZV-ASO, OS DLV.

[53] Act No. 2/1991 Coll., on CB, as amended.

[54] Source: OSPZV-ASO and OS DLV.

[55] Source: ditto.

[56] Source: ditto. For the standard content of collective agreements, see e.g. J. Hála, A. Kroupa, EIRO Comparative Study on Industrial Relations in Agriculture - case of the Czech Republic, EIRO 2005.

[57] Source: ditto.

[58] RILSA estimation.

[59] Tne number of OSPZV-ASO´s member organisations (= the number of companies) in the Fishing Industry sector. OSPZV-ASO data, 2005.

[60] The number of OS DLV´s member organisations (= the number of companies) in the Fishing Industry sector. OS DLV data, 2005.

: 335)[61] x 100 = 3.9%. The share of employees in the sector covered by a company collective agreement is as follows: (1070[62] + 71[63]) : 1.720[64]) x 100 = 66.33%. The applicable legislation does not allow extensions of enterprise-level collective agreements.
As far as players' positions with regard to future developments in the SD at company level in the sector is concerned, the modern tradition of SD at enterprise level in the Fishing Industry sector stretches back unbroken to the start of the 1990s, and this fact may have a positive impact on future developments. The decisive factor, however, will be the economic results achieved in the sector, which are constrained by the limitations of natural resources. As far as the mutual positions of the social partners are concerned, we have no information suggesting a change in the existing disparity between the situation of the employers, who do not have their own organisation representing employer interests and are not members of employers' organisations operating in related sectors, and the trade unions, which are able to make full use of the advantages associated with membership of larger organisations.

In view of the said defection to OS DLV by one trade union organisation in the sector, this federation deserves to be mentioned at least briefly[65]. OS DLV mainly organises employees of enterprises operating in the woodworking, furniture-making, consumer and paper industries, in forestry, water and environmental management, and in related fields of activity. In these sectors, OS DLV is the leading trade union, and has around 27,000 members. Its member organisations operate in around 260 companies, where they represent the interests of almost 60,000 employees (regardless of whether the employees are union members or not, as by law in the Czech Republic trade unions negotiate on behalf of non-members as well as members). OS DLV is a member of the largest trade union centre in the Czech Republic, the Czech-Moravian Confederation of Trade Unions (Českomoravská konfederace odborových svazů, ČMKOS), and at international level of the International Federation of Building and Wood Workers (IFBWW) and Public Services International (PSI), among others. Up to now, OS DLV has been one of the most successful affiliates of CMKOS in terms of the number of higher-level (ie multi-employer) collective agreements (HLCAs) concluded each year. It has signed a total of three to six HLCAs per year with employers' organisations, usually for one-year periods. In 2004, the five HLCAs negotiated by OS DLV covered some 40,500 employees (enterprise-level collective agreements negotiated by the federation's member unions in 2004 covered 47,000 employees).

With the exception of a very short period at the start of the 1990s (before privatisation and the fragmentation of a large enterprise in the sector), CB at sector level has not taken place and no HLCAs have been signed. The principal reason is the absence of an employers' organisation (evidently due to the lack of interest in SD at this level among employers – collective agreements are concluded in sectorally significant firms).
There is no promotion of the bipartite SD at the sector level.

Comment

The Fishing Industry sector in the Czech Republic is a small sector of the economy and accounts for a small proportion of total employment in the country. SD is constrained by the absence of an employer social partner at sector level. By contrast, as far as CB conducted at enterprise level is concerned, the trade unions speak of a positive tradition and mainly good experiences in this area.

[61] The companies with employees only, 31.12.2005.
[62] Source: OSPZV-ASO, 2005.
[63] Source: OS DLV, 2005.
[64] Source: CSO, 2004.
[65] See J. Hála, A. Kroupa, Forestry and wood workers´ union issues strike warning, EIRO 2004.

DENMARK

1. Description of the sector's characteristics

1.1. Delimitation and scope of activities in the sector

The Danish Industrial Classification follows the NACE Rev.1.1 Classification in accordance with EU Commission Regulation no. 29/2002. National statistics show NACE 05.01.00, which covers 1) sea fishing, coastal fishing and freshwater fishing, 2) catching of salt water and fresh water shellfish and molluscs, 3) whaling and the whale catch and 4) related service activities (Statistics Denmark 2003). According to the Danish Directorate of Fisheries (Fiskeridirektoratet) 3497 people worked with activities under NACE 05.01.00 in 2004.

The activities in the Fishing Industry in Denmark depend on the fish stocks in the North Atlantic and the quotas dictated by the EU as well as the competition for market share predominantly in Europe. But the Danish fishing industry is not solely about fishing, but also the processing and production of fish food. Actually more people are employed in fish processing plants than in fishing. (i.e. 3,641 persons in 2004), Therefore, this is an essential part of the Fishing Industry in Denmark. This activity along with others such as smoke curing and salting of fish goes under NACE 15.20.10, i.e. Processing and Preservation of fish and fish products. The production within the fishing industry is based on freshwater fish from within Denmark, There are large imports of different types of raw fish, which are used to produce semi-finished products and finished products GEMBA 2005: p. 12). Hence NACE 152010 could very easily be included in a study on the Danish Fishing Industry, but as the scope of this study is narrowed down to activities under NACE 05, the rest of the study will focus on this.

From a CB point of view the industry is considered to be independent of other sectors within the industry (such as production) and other industries, thus specific sector bargaining exists for fishing activities. However the social partners have a broader definition of the fishing industry than what is in NACE 05.01.00. The Danish Fishermen's Association defines the activity as catching fish and landing them, but also includes auctions as part of the sector. In the national statistics, auctions have NACE 51.17.10. 3F – the trade unions within the sector also have a broader definition, as they also include repairing, which has NACE 35.11.00 in national statistics. This should be taken into consideration when reading the statements and statistics from the social partners.

1.2. Socio-economic features of the sector

In the last few decades the fishing industry in Denmark has been under challenge from a globalised world, from quota regulations and from price fluctuations affecting landings, turnover and the employment rate within the sector. Some of the most important categories in the Danish fishing industry include cod and shrimp (GEMBA et. Al. 2005). Statistics from the social partners and The Danish Directorate of Fisheries mainly focus on specific types of fish, such as cod, flatfish and shrimp. The central employers' organisation within the sector, the Danish Fishermen's Association (DFA) has a slightly different perspective, i.e. the overall turnover in 2005 was 2.9 billion DKK (388,744,649 euro)[66] according to them. According to their statistics this is a 23.7 % decrease since 2002. To do it justice, though, we have to take into consideration that the turnover has been slowly increasing since the big decline in 2003, and Niels Wichmann, administrative director of DFA, is optimistic and forecast the turnover in 2006 to be above 3 billion DKK. The gross value added or GDP for the Danish Fishing Industry in 2005 was 160,1 mn. euros, while the total gross value added in Denmark was 176,780 mn euros (exchange rate 1 euros = 7,45991). (Source: Statistics Denmark NAT07). According to Statistics Denmark exports within the fishing industry for NACE 05.00.00 in 2003 were 383,000,000 DKK (euro = 51,615,018.72). The Danish export of fish is predominantly directed at the EU14-market, which, in 2003, took 87 %, measured in value (GEMBA et. Al. 2005:21). DFA estimates the scale of the underground economy to be insignificant. To support this estimate, an ongoing investigation carried out by the Ministry of Food and the Ministry of Taxation demonstrates that the underground economy is limited ("Første "Operation Sorte Fisk" gennemført". 22-juni 2006, www.fd.dk, nyheder). On the other hand Henrik Berlau, key negotiation secretary in 3F considers the scale of underground economy to be significant, but unknown. The geographical spread of the sector is biased, both in terms of employees and gross earnings. The majority of employees within the sector work in the Nothern and Western parts of Jutland (constituting 71,7 % of the employees in the sector), and here the gross earnings were 71,6 mn Euros and 85 mio euros respectively in the first half-year of 2006 (source: The Danish Directorate of Fisheries, Fiskeriets bruttoindtjening, 18. argang, 1. august 2006).

[66] Exchange rate 1 euro = 7,45991 DKK

Table 1: Landings in 2005

	Total	Some of the important categories:				
		Cod and other codfish	Herring	Flatfish	Shrimps	Industry
Landings in tons	854,359	39,185	143,375	26,927	2,353	535,085
Landing value in 1000 DKK	2,613,610	518,795	313,159	489,796	28,962	413,050

Source: The Danish Directorate of Fisheries

Table 2. Companies in the Fishing Industry 2003

Sectors	Number of companies	% without employees	% with <10 employees	% 10-49 employees	% 50+
05 Fishing	1,849[67]	52.9 % (978)	46.5 % (860)	0.6 % (11)	-

Source: Statistics Denmark, General Firm Statistics 2005:16, table 3, 27-grouping, own calculations.

Even though the Danish Fishing Industry is in the top 5 within the global fishing industry, in terms of landings and turnover, there are relatively few people employed in the sector. According to the Danish Fishermen's Association there were 5,189 crewmembers on Danish fishing vessels in 2004. This is a different number than Statistics Denmark has published and a number that has decreased noticeably from 7,567 in 1996. The part of the fishing industry included in this study has a preponderance of male workers. In 2004, 96.9 % of the employees were men and only 3.1 % women.[68] The industry is characterised by a small number of young workers (only 19, 3 % were under age 34 in 2004), whereas 74, 5 % are between ages 35-64 (The Danish Directorate of Fisheries). The biased age distribution is an issue, which the partners are trying to come to terms with, to make the industry future-proof (see details below). Historically the sector has been distinctly full of unskilled workers. It still employs predominately unskilled workers, but the picture is changing slowly towards more skilled workers, partly due to an apprentice training, which the social partners initiated some years ago. However, the people who manage the vessel have to have appropriate qualifications. There is no data on the characteristics of the employment in the sector in terms of wages and on atypical work. However, the estimation from the DFA was that atypical work was not very common in this sector.

Table 3. Workers (full-time equivalent) –broken down by company size-2003

Sectors	Number of self-employed	Number of employees in the sector	Number of employees in the sector/total number of employees in all sectors (%)	% of employees in the sector in companies with <10 employees	% of employees in the sector in companies with 10-49 employees	% of employees in the sector in companies with 50+ employees
05 Fishing	978	2,072	2,072/2,168,346=0,09 %	91,3 % (1,891)	8,7 % (181)	-

Source: Statistics Denmark, General Firm Statistics 2005:16, table 3, 27-grouping, own calculations.

Newest statistics show that 2,450 were registered as employed workers under the fishing industry defined as NACE 050100 in 2005 (Statistics Denmark, RASOFF).

The Danish fishing industry is losing market shares and has been decreasing over the last ten years. Despite the general loss of market share, the Danish industry, except for codfish, has managed to maintain its market share within the largest markets, i.e. Germany, France and Italy. And when the Danish resource base decreases this has been compensated for by outsourcing

[67] According to The Danish Directorate of Fisheries homepage, there are (we do not know which year the statistics refer to) approximately 3,400 fishing vessels registered in Denmark, employing 5,400 crewmembers, including the owners of the vessels.

[68] In other areas of the fishing industry, which are not covered by this study there are actually more women than men. For example, this is the case for workers at fish processing plants, where 55.3 % of the workers were women in 2004 (The Danish Directorate of Fisheries).

(GEMBA et. Al. 2005). Since the beginning of the 1990's, employment within the industry has decreased (Andersen 2005). A newsletter in September 2005 from 3F estimated that 22 % of the members within the industry were unemployed in 2005 (this includes the activities under NACE 050100 and NACE 152000), and they estimated that the real unemployment rate could be even higher (3F: Ekstrem ledighed I Fiskeindustrien). Henrik Berlau explained that the decrease in employed fishermen is caused by the concentration of capital due to the imposition of convertible quotas. An example of the pressure on the industry can be found in the embargo put on the catching of Tobis, by the EU, last year. The social partners within the industry estimated this to have had a significantly negative effect on the employment rate (Jørgensen 2005).

2. Description of organisations active in the sector

2.1. Workers' organisations

United Federation of Danish Workers, 3F/Fagligt Fælles Forbund

The only workers' organisation represented in the sector is, as mentioned earlier, 3F. This is also the largest trade union in Denmark, in terms of active members. 3F has currently more than 350,000 members of which 321,000 are active. 3F was formed on 1st January 2005 through a merger of the General Workers' Union (Specialarbejderforbundet i Danmark, SiD) and The National Union of Female Workers (Kvindeligt Arbejderforbund, KAD). The SiD was founded in 1897, as a union for unskilled men only. Women were not allowed because of the risk of underpayment, i.e. they could lower the average wage level if they were accepted into the union and got access to the same (unskilled) jobs as men. This resulted in the foundation of one of the only female unions in the world. In 1901, local groups of women founded the National Union of Female Workers (KAD), which until the merger with SiD in 2005, only included female members. Throughout a little more than a hundred years, there were thus two unskilled workers' unions. One for men and one for women, even if this separation was difficult to maintain as the women entered the labour market on a larger scale and in the same functions as men. The SiD allowed women as members, where they occasionally were working under the same collective agreement as SiD members. But it was first in 1971 that the SiD Congress ultimately allowed the entry of female members. Today, 3F organises both skilled and unskilled workers in several sectors including industry, building and construction, transport, cleaning, gardening, agriculture and forestry. The union activities are entirely funded through membership subscriptions. 3F is a democratic membership-controlled organisation comprised of 76 autonomous local unions spread all over the country. The highest authority is the Congress, which is held every three years. More than 300 staff work in the headquarters in Copenhagen, but it is not known how many are employed in the 86 autonomous local unions. 3F's members are organised in six main areas: Industry Group (151,000 members), The Public Sector Group (50,000 members), The Building and Construction Group (48,000 members), The Green Group (18,000 members), The Private Sector Service Group (14,000 members) and The Transport Group (68,000 members). The latter group includes drivers, warehouse workers, rescue workers and fishermen. 3F has been organising fishermen for a long time as the only trade union doing so. 3F is financed by membership subscriptions.

The organisation has reciprocal recognition. 3F has concluded 166 sector collective agreements (national coverage) and around 4,500 single-employer agreements (also known as adoption agreements). 3F has 5,436 employee representatives, i.e. shop stewards, at company level. One collective agreement covers partner fishermen (partsfiskere) nationwide. It is the only collective agreement in the fishing industry, i.e. NACE 05, and settled between 3F and DFA.

At national level, the organisation is affiliated to LO – Landsorganisationen i Danmark / The Danish Confederation of Trade Unions

Table 5. Workers' organisation

Organisation	Members		Estimation of density	CB	European affiliation	Other affiliation
	Total number of members of the organisation	Number of members working in the sector				
United Federation of Danish Workers, 3F	321,000	1,000 (5,741 in the fishing Industry as a whole)	ND	Yes	ETF	NTF ITF

Source: 3F homepage, Henrk Berlau from 3F, Andersen et. al. 2005.

2.2. Employers' associations[69]

Danish Fishermen's Association, DFA/Danmarks Fiskeriforening

The organisation of fishermen into an employers' association goes back to 1887, but the current association, DFA, was established in 1994 when the two former fishermen's organisations "Danmarks Havfiskeriforening" and "Dansk Fiskeriforening" merged. Their aim is to enhance the interests of fishermen –through both political participation and advice. The DFA is financed by membership subscriptions. It is a nationwide organisation comprising 65 local fishermen's organisations. The local organisations both have owners of fishing vessels and partner fishermen as members. There are approximately 15 employees within the organisation, comprising biologists, economists, and journalists, among others.
The organisation has reciprocal recognition. The DFA negotiates the collective agreement covering partner fishermen within the fishing industry with 3F. The general assembly is the highest assembly within the DFA and is elected on a two-year basis. At company level, the association is not present during the negotiations but through membership of the association, the employer is guaranteed support and advice in questions concerning CB and agreements at local level (see 3.2.b).
The Danish Fishermen's Association is not affiliated to other national organisations.

Table 6. Employers' organisation

Organisation	Members		Estimation of density	CB	European affiliation	Other affiliation
	Total number of member companies	Total number of workers in member companies				
Danish Fishermen's Association/Danmarks Fiskeriforening	Approximately 2,000[70] fishermen	ND	80% (estimate)	Yes	Europêche*	-

Source: Niels Wichmann, Danmarks Fiskeriforening.
* through which they participate in SD Committee.

3. Description of the SD in the sector

The Danish industrial relations system is based on voluntarism and mutual recognition between employers and employee organisations. The state does not interfere in CB and collective agreements do not have to be recognised or even registered. The recognition is thus reciprocal and lies in the successful ability to negotiate collective agreements with an equal partner. The Danish industrial relations system has its origins in the 1890s and the organisations on both sides that were founded and mutually recognised in those days still exist, although they have undergone a few changes during the hundred years since then; but basically the structure is the same.

3.1. Tripartite concertation

Tripartite social concertation does not take place in the Danish fishing industry. As a rule tripartite concertations seldom take place in Denmark and when they do, they mostly take place at national level, and not at sector level. The social partners could occasionally (ad hoc) be heard in questions concerning the industry.

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[69] This also have the implication that Association of Fishmeal and fish Oil Manufacturers in Denmark (member of COGECA) is not relevant to the present study, as it is an association representing companies under NACE 152010.
[70] Niels Wichmann from Danish Fishermen's Association stated that a peculiarity within the sector related to the organisation of the employees in the sector is, that many of them are actually organised both through trade union 3F and through the local fishermen's organisations associated to Danish Fishermen's Association.

3.2. Bipartite SD in the sector

a) At sector level

The sector SD in the fishing sector in Denmark takes place between DFA and 3F. CB at company level is linked to the sector level through organised (or centralised) decentralisation.
DFA and 3F sign a framework agreement containing agreements on working conditions like compensation for sickness, minimum benefits per day of fishing, etc. All provisions are open to bargaining at local level. In the collective agreement there are no settled levels of salary; this salary is dependent on the value of the landings (i.e. fish species, prices and volume). Training is a major field of collaboration between the social partners, especially with regard to apprentices. The 2-year apprenticeship emerged in 1996 from two considerations: partly due to a horizontal EU directive in 1993, which stated that young people under the age of 18 were only allowed to work on vessels as part of their training and partly due to the fact that there was a biased age distribution within the fishing sector. They needed younger people to enter this sector to be able to make the fishing industry "future proof". As shown earlier, there is still a biased age distribution within the sector, but the apprentice programme has been adopted more and more, with 300 young people having graduated from it over the last ten years. There are no conflicts between the players regarding recognition issues. One collective agreement is in force for the moment. It was settled in 2004, between 3F and DFA and is to be renegotiated in 2007. The agreement covers partner fishermen on Danish fishing vessels who are members of 3F. The coverage rate of the collective agreements is difficult to estimate, as the density of organised partner fishermen is not available. The type of workers covered by the collective agreement signed and which remain in force for the moment are partner fishermen, i.e. skilled and unskilled blue-collar workers in fishing. The duration of these agreements is unknown. There are no procedures for extending collective agreements to parties that are not signatories to the agreement.
There are no players who, although not recognised (or only partially recognised) by the dominant players or by public authorities, must be regarded as playing a role in industrial relations in the sector. The players' positions with regard to future developments in the SD at sector level are positive in terms of collaboration on training to "future-proof" the Danish fishing industry. There are no obstacles to the development of the bipartite SD at sector level. There is no promotion of the bipartite SD at sector level.

b) At company level

Bipartite SD and collective negotiation at company level takes place between the employees' trade union representative, the shop steward, the Harbour Safety Committees (Havnesikkerhedsråd) and the company management. The employers' association is not present during the negotiations but through membership of the association, the employer is guaranteed support and advice in questions concerning CB and agreements at local level. In principal, the employer is able to conclude agreements without needing the formal acceptance of the sector organisation. In practice, the employer and the association talk about acceptable wage levels, for instance. It is only in case of an industrial dispute that the sector employers' organisation will represent the employer directly. There are no conflicts between players regarding recognition issues.
As a special feature within the fishing industry, DFA and 3F has established Fiskeriets Arbejdsmiljøråd (Fisheries Work Environment Council), which has functioned for 12 years now. Here, the social partners are represented equally and their main aim is to take care of issues that may arise relating to the work environment and safety. On a local level, it is present through the Harbour Safety Committees, which collaborate closely with the union's representatives in the companies in the sector. It should be noted that the sector level collective agreement is a central agreement which applies to the whole sector. It is not known how many company level agreements there are in the sector; thus, information relative to them (content, type and share of the companies and workers[71] covered, duration) is also unknown. There are no procedures for extending collective agreements to parties that are not signatories to the agreement.

There are no players who, although not recognised (or only partially recognised) by the dominant players or by public authorities, must be regarded as playing a role in industrial relations in the sector. The players' positions with regard to future developments in the SD at company level in the sector of Fishing Industry are positive as it is a system that is developed more and more to secure for instance working conditions.

There is no multi-employer bargaining that does not correspond to the sector.

[71] However, it is logically estimated that if there is a further negotiation of the agreement beyond the sector level, then the partner fishermen are covered by the company collective agreements.

Comment

In a European context, the Danish fishing sector plays an important role as one of the top five export nations. Even though they have lost market share in Europe, it has remained an important supplier of fish.

The sector is rather small in Denmark in terms of workers - with only 2,072 workers and 978 self-employed, which is 0,09 % of the total number of employees overall in Denmark. On the other hand the sector contributed to the economy with a turnover of 2.9 billion DKK in 2005.

Organisationally, the sector is unique with 3F and Danish Fishermen's Association (DFA) negotiating a sector agreement covering the partner fishermen nationwide. These two organisations are the only ones organising the partners in the sector, and they collaborate on important issues such as training policy. The sector agreement puts down a framework for working conditions. At company level, local union shop stewards can negotiate further. In the fishing industry, the wage, however, depends on the characteristics of the landings – volume, species and prices of the species.

As a special feature 3F and DFA have established a Fisheries Work Environment Council to deal specifically with work environment and safety issues. Here the social partners are equally represented.

ESTONIA

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

In Estonia, from the national statistics point of view, the fishery sector (NACE 05 – Fishing, operation of fish hatcheries and fish farms, service activities incidental to fishing) includes the following activities[72] fishing (NACE 05.01) and fish farming (NACE 05.02).

1.2. Socio-economic features of the sector

Table 1 presents the dynamics of GDP over the years of 2000-2004. As is seen from the table, the share of fishery sector in the GDP is continuously decreasing and is of minor importance in 2004 and it is the smallest sector in Estonia.

Table 1. Gross domestic product at current prices (million EEK), 2000-2004

	2000	2001	2002	2003	2004
Fishing	209.0	196.7	185.2	126.0	133.7
Total value added	82,705.1	92,927.5	103,556.6	112,763.2	125,660.9
GDP at market prices	92,937.7	104,459.0	116,915.3	127,333.8	141,493.4
Share of fishery sector from GDP (%)	0.22	0.19	0.16	0.10	0.09

Source: Statistical Office of Estonia, electronic database, www.stat.ee

As with GDP, the shares of net sales, exports and total profits of fishing are marginal. Net sales in fishing have been fluctuating; in 2000-2002 the figure increased rapidly, but since 2002, it has decreased and reached almost the same level as in 2000. As in the total economy, net sales have increased steadily, the share of the fishery sector in net sales has diminished during the period. Like net sales, in total economy exports have increased, with especially fast growth being seen in 2004, probably due to Estonian accession to EU. In Estonia, data concerning exports in the fishery sector has been available since 2002. The figure has fluctuated during the period with fishery exports increasing by 26% in 2003 and decreasing by 55% in 2004 compared to the previous year. This drastic change reflects in the fishery sector share of total exports, which has fallen by 0.3 percentage points. The total profit in the fishery sector has been fluctuating a lot, which reflects in share figures, due to a steady increase in total profits in the Estonian economy. In 2004, total profits in the fishery sector accounted for only 0.02% of total profits in the whole economy.

Table 2. Net sales, exports and total profit in the fishery sector and their relative importance in economy, 2000-2004 (thousand EEK, %)

		2000	2001	2002	2003	2004
Total	Net sales	254 649 181	291 410 783	327 726 866	354 411 304	417 176 287
	Export	55 999 112	67 021 772	74 449 090	81 189 620	104 094 897
	Total profits	10 935 989	11 143 840	15 620 992	20 559 991	23 810 846
Fishing	Net sales	602 128	692 622	749 633	639 464	605 737
	Export	ND	ND	293 303	370 531	167 520

[72] Estonian Classification of Economic Activites is based in NACE, Rev. 1.

	Total profits	-32 939	50 316	8 965	39 736	5 473
Share of total	Net sales	0.24%	0.24%	0.23%	0.18%	0.15%
	Export	ND	ND	0.39%	0.46%	0.16%
	Total profits	..	0.45%	0.06%	0.19%	0.02%

Source: Statistical Office of Estonia, electronic database, www.stat.ee

According to the Estonian Institute of Economic Research (Eesti Konjunktuuriinstituut, EKI), the share of people receiving undeclared wages has been stable over the period of 2002-2004. In the total economy, 84-86% of workers never get undeclared wages, 7-9% get undeclared wages occasionally and only 5-8% regularly (Varimajandus Eestis, 2005). According to surveys of EKI, the undeclared wages are more widespread in services (43%), construction (20%), trade (12%) and manufacturing (10%).

In the fishery sector, the importance of the underground economy is difficult to measure, as the majority of workers are self-employed. However, very low reported income in the fishery sector is an indirect indicator of the existence of the underground economy in the sector.

Table 3 describes the size of enterprises in the fishery sector. The number of enterprises in the fishery sector has been quite stable; however, as a share of the total economy, this sector is of marginal importance (the share of fishery enterprises out of the total number of enterprises was 0.31% in 2004). As can be seen from the table, the majority of enterprises have between 1 and 9 employees (the share of such enterprises was more than 80% in 2004). The activities of the fishery sector are mainly concentrated in the coastal areas (from South-West up to North-East) and islands of Estonia.

Table 3. Companies (2004)

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Total of the sector	123	ND	82.9 % (102)	13.8% (17)	3.3% (4)	0

Note: ND – Statistical Office of Estonia does not publish data about companies without employees.
Source: Statistical Office of Estonia, electronic database, www.stat.ee (February 20, 2006)

If one looks at the employment data, then we can again see that this sector is of marginal importance in overall employment and it is on a declining trend. According to the Labour Force Survey data, the majority of workers (around 90%) in the fishery sector are men and the majority have upper secondary education. The distinction by occupations reveals that around 40% of workers are in the position of skilled agricultural and fishery workers and around 20% work as technicians and associate professionals. While the national average wage has increased constantly by 8-12% per year during the last years, the level of the average wage in the fishery sector is at a very low level (only 60.8% of the national average in 2004) and the nominal wage has even been showing a declining trend since 2003. Together with agriculture and hotels and restaurants the fishery sector belongs to the sectors with the lowest level of remuneration.

Table 4. Workers (2004)

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	ND	1068	0.26	(352) 32.6	(265) 24.8	(451) 42.6	0

Note: ND – Statistical Office of Estonia does not publish separate data about self-employed workers and employees.
Source: Statistical Office of Estonia, electronic database, www.stat.ee (February 20, 2006)

Until the collapse of Soviet Union, the fishery sector was part of the soviet planned economy and all enterprises were owned by the state. After the gaining of independence, the fishery sector companies were privatised within a short space of time. By now, in the fishery sector the majority of people are self-employed or they are working in very small enterprises (1-9 employees).
The Estonian National Development Plan for the Implementation of the EU Structural Funds (Single Programming Document 2004-2006) states that it is important to preserve the natural reproduction capacity of fish populations. To maintain the competitiveness of the fisheries sector, it is necessary to achieve a balance between the natural reproduction of fish and the use of fish as a resource. The intensive use of fish stock depends, above all, on the existing fishery capacity.
The development and modernisation of aquaculture production facilities are gaining in importance and this provides the fish industry with alternative supplies of raw material in addition to natural fish stocks. This also contributes to employment in rural areas. The production volumes of the fishery sector can be, above all, increased in fish hatcheries by applying modern fish breeding technologies and establishing new fish hatcheries that meet modern requirements and reconstructing the existing hatcheries. Up to now, most favourable natural opportunities for establishing or extending fish hatcheries or increasing the production intensity in existing fish and crayfish hatcheries have not been used, mainly due to the lack of capital, insufficient awareness of new technologies and limited production volumes.
Another development in the fishery sector will be the modernisation of food handling and technical conditions on board the fishing vessels: improving technical conditions of fishing vessels, fish handling conditions, working conditions and occupational safety, promoting the introduction of selective fishing techniques. The fishing fleets mostly consist of old fishing vessels of Soviet origin, built in the 1970-80s, of low quality of steel and provided with unreliable engines. In order to optimise the costs of fishing and improve the quality of fishing, the fishing vessels of Estonia need to be modernised with more contemporary and selective catching technologies. Also, there is a need to facilitate investments in inland fisheries, which is an important sector in rural areas and forms a traditional way of living on the coasts of inland waters. It supplies the processing industry with valuable raw material and the fish products made of freshwater fish have good markets in the world. Therefore, it is important to improve the quality of fish, the working and safety conditions in inland fishing vessels and to rationalise the fishing operations. However, the renewal of the fishing fleet should not increase the fishing capacity.
At the same time, most probably the number of employees will decline further in the near future, as the restructuring of fisheries will cause the decrease of working places in the sector. Therefore, it is important to support fishermen in case of permanent cessation of fishing activities and to provide re-training for those who are made redundant in order to alleviate the unwanted social and economic impact of restructuring on the fisheries.

2. Description of the organisations active in the sector at national level

2.1. Description of the workers' organisations active in the sector

There have been no central trade union organisations at the sector level in the fishery sector since the beginning of 2006. At the end of 2005, the Estonian Fisheries Workers Trade Union (Eesti Kalanduse Ametiühingute Liit, EKAL) ceased its activity. It was impossible to find contacts with any person from EKAL to conduct interviews and to ask about the past activities of the trade union organisation[73]. Up to end of 2005, EKAL was a member of the central organisation of trade unions – Confederation of Estonian Trade Unions (Eesti Ametiühingute Keskliit, EAKL). According to the Register of Collective Agreements, EKAL has not signed any collective agreements since 2001, when the register was created.

2.2. Description of the employers' organisations active in the sector

There are no employers' organisations in the fishery sector which act as a social partner in Estonia. The Estonian Chamber of Agriculture and Commerce acts more as a professional organisation and it's main goal is to promote the field of activity, by designing and consulting on business and support activities of its members in the domestic as well as foreign markets. It represents and promotes the common interests of its members. An overview of the professional organisations active in the fishery sector is given in the Section 2.3

[73] The phone numbers presented in the table of European Transport Workers' Federation (ETF) members' organisations are not in use anymore.. The central organisation of trade unions has not had any contact with representatives of EKAL after the elimination of the EKAL from their members list.

2.3. Description of the professional organisations active in the sector

There are different professional organisations active in fishery sector, but the SD in the sector is absent. In general, the purpose of these professional organisations is to promote the field of activity, in which they are operating; by designing and consulting on business and support activities of its members in the domestic as well as foreign markets. It represents and promotes the common interests of its members, exchanges information, represents the membership in cooperation with similar international organisations and associations of the particular field, etc. The organisations are the following:

- The Estonian Fishermen's Association (Eesti Kalurite Liit, EKL), which was founded in September 1995 as a non-profit voluntary public association. It represents the interests of the fishermen, both self-employed entrepreneurs and companies and its goal is to unionise the organisations in the fishery sector and to support its members' activities in the domestic as well as in foreign markets. The main activities of the EKL are related to the promoting of the field of activity, to the development of Estonian fishery sector and helping the members in the issues related to the fishing. EKL represents its members in central and local government, gains and provides information about possibilities of co-operation, provides training, exchanges information, represents members in similar international organisations and associations, etc. The main sources of finance of the organisation are membership subscriptions, donations, operating income and other income. At the beginning of 2006, EKL had 60 self-employed people, 6-7 member organisations. Two employees coordinate the activity of the organisation. EKL is a member of the Estonian Chamber of Agriculture and Commerce (see below).
- The Estonian Fish Farmers Association (Eesti Kalakasvatajate Liit, EKKL) started its activities in July 1989. EKKL is a non-profit organisation, which incorporates self-employed people and enterprises engaged in fish farming. The main activities of the organisation are connected with the representation of its members at the state-level institutions, provision of information about cooperation possibilities, application of national investment and subsidies for development of infrastructure of fish farms and fish hatcheries, negotiations with other organisations in the fishery sector and fish industry, with customers, etc. The sources of financing of the organisation are the membership subscriptions, donations, income from publications and organising different events, etc. Members of the EKKL are: 69 self-employed people, 4 enterprises and 8 honorary members. EKKL is a member of the Estonian Chamber of Agriculture and Commerce (see below).
- The Estonian Chamber of Agriculture and Commerce (Eesti Põllumajandus-Kaubanduskoda, EPKK) was established in 1996 as an association of agricultural producers and processors under private law. At the beginning of 2006, EPKK had 128 members, including 15 local and 3 national associations of agricultural producers as well as 11 larger professional associations. Among the members' organisations, there are three organisations – EKL, EKKL and one entrepreneur – active in the fishery sector. The aim of the EPKK is to promote Estonian agricultural products and food in domestic and foreign markets through its services, to support cooperation between Estonian farmers and food processors, to support the trade of agricultural produce and food in domestic and foreign markets, to disseminate necessary information to its members and to represent its members. The EPKK is a member of EUCOLAIT, the European dairy trade organisation, and an associate member of European agriculture organisations COPA/COGEGA.

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

There is no tripartite concertation at sector level in the Estonian fishery sector. In Estonia, tripartism is satisfactorily developed only at the national level, but the SD at sector level is notably less developed (see also Section 3.2). There are no other kinds of consultation or meetings between the government and the organisations for the sector. Indeed, as there is no workers' organisation in the fishery sector, we cannot talk about tripartite concertation in the sector. However, fishing is seen as a sector which needs further development and is a priority area for the government. One of the most comprehensive documents describing the actions in the fishery sector is the Estonian National Development Plan for the Implementation of the EU Structural Funds (Single Programming Document 2004-2006) (prepared by the governmental institutions, central social partners organisations, etc.)

3.2. Description of the bipartite SD in the sector

In the fishery sector, bipartite SD is not developed[74]. According to the chair of the EKL, collective negotiations have never conducted in the fishery sector in Estonia. Although the consultations and negotiations at sector level between EKL and EKAL[75] have taken place, they have been occasional. The main reasons for the absence of social partnership are easily derived from the previous information: workers are mainly self-employed and the CB would mean, in most cases, negotiating with itself. Unfortunately, there is no data on any promotion of the bipartite SD in the fishery sector.

At company level as was seen from Table 3, the majority of enterprises (more than 80% in 2004) have 1-9 employees and this makes unionisation very difficult. The majority of employees are self-employed and therefore the development of SD is complicated. Also, the continuous decline of the fishing industry does not support the development of SD. According to the Register of Collective Agreements, there are no agreements signed in this sector at enterprise level.

Comment

Fishing is one of the traditional economic activities in Estonia, but this sector plays a minor role in Estonian economy, both in terms of aggregate output and employment. One reason for the marginalisation of the sector was the transition shock, when big state-owned enterprises were closed down. Today, only small firms and self-employed people operate in the sector. The characteristics of the fishery sector are: the minor fraction of total employment that it represents, the low wages, and obsolete equipment (the fishing fleets consists mostly of old fishing vessels of Soviet origin).

Industrial relations in the fishery sector are going through a transformation period. Social partners and CB, in the classical sense are absent in the fishery sector. Organisations representing both employers and employees are more like professional organisations, dealing with the promotion and representation of the fishery sector. The reason for the low level of partnership is most probably that the majority of people in this sector are self-employed. Another reason is that more than 80% of enterprises are very small (1-9 employees) and it is complicated to create trade union organisations under these conditions.

The fish industry is considerably bigger and more important than the fishery sector. The fish industry, which uses both domestic and imported fish as raw material, plays an important role in the Estonian food industry. Social partnership is more widespread in the fish industry than in the fishery sector in Estonia. However, because the organisations act independently in the fishery sector and the fish industry, the fish industry is not taken into consideration in this report.

Annex: List of organisations

EKI – Estonian Institute of Economic Research, Eesti Konjunktuuriinstituut
EKAL – Estonian Fisheries Workers Trade Union, Eesti Kalanduse Ametiühingute Liit
EAKL – Confederation of Estonian Trade Unions, Eesti Ametiühingute Keskliit
EKL – Estonian Fishermen’s Association, Eesti Kalurite Liit
EKKL – Estonian Fish Farmers Association, Eesti Kalakasvatajate Liit
EPKK – Estonian Chamber of Agriculture and Commerce, Eesti Põllumajandus-Kaubanduskoda

[74] Social partnership and SD at the sector level is not very common in Estonia. This is evident from the low representation, often also institutional and financial shortcomings of social partners’ institutions. Collective agreements on wages and working conditions are being negotiated only in a limited number of sectors and companies. The “classical” sector-based collective agreement, as they exist in the old EU member states, is limited to few in Estonia (the only valid (February 2006) sector collective agreement is in healthcare sector).

[75] Is not active today.

FINLAND

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

The delimitation of commercial fishing given by Statistics Finland corresponds to the NACE classification (NACE O501) and it does not include fish farming (NACE 0502) or the processing of raw fish into various fish products, whole sale trade of fish and retailing of fish. Commercial fishing is a part of fishing cluster. The whole cluster consists of the following segments: commercial fishing, fish farming, processing of raw fish into various fish products, wholesale trade of fish and retailing of fish.

1.2. Socio-economic features of the sector[76]

Finnish marine fishing fleet is one of the smallest in Europe. The volume of landed fished caught by the Finnish fleet comprised only 12 per cent of the whole volume of fish caught in the Baltic Sea in 2004. The gross value added of Finnish commercial fishing (NACE 0501) was 65 million Euros in 2004 and commercial fishing accounted for 0,05 % of national gross value added. Commercial fishing is a part of a fishing cluster. The whole cluster consists of the following segments: commercial fishing, fish farming, processing of raw fish into various fish products, wholesale trade in fish and retailing of fish. The fishing cluster accounted for 0.1 % of national gross value added and for 0.1 % of employment in Finland. The Finnish fishing cluster employed about 3,250 people in 2004 and 3,500 people in 1990. The employment in commercial fishing and fish farming has decreased since 1990, but in the other segments, especially in retailing of fish and processing of fish, the employment has grown. The cluster is dispersed over the whole Finland. The cluster has its most significant positive impact on local economy in sparsely populated coastal areas. Statistics Finland does not give the data of GDP by sector, but indicates that the share of the each sector in GDP is about the same as the share of each sector in national gross value added.

The volume of landed fish has been stable since the 1980s, but the value of landings has decreased gradually. There are many reasons for the weak economic performance of Finnish fishery: the increasing volume of imported fish (for instance farmed salmon from Norway), the deregulation of the international fish trade which have caused an decrease in the price level of fish products, the increased damage to fishing caused by the seal population at Northern Baltic (the Gulf of Bothnia and the Gulf of Finland), and rising fuel prices. There is no underground economy in the fishing sector in Finland.

The companies are totally domestic small companies and mainly one-man firms (with no employees).

Companies: Finnish commercial fishing. 2004

Sector	Number of companies	% companies with ‹10 employees	% companies 10-49 employees
Total of the sector	387	99.5 % (385)	0.5 % (2)

Source: Statistics Finland.

The workers are wage-workers to significant extent only on the biggest vessels (trawlers), which employ about one third of the fishermen in commercial marine fishing. The great majority of fishermen are self-employed. They either own their vessels or they are so called "share basis" fishermen, who get their compensation for their work on a share basis. The share is the percentage of the value or volume of landed fish after costs of fuel and possible some other costs of fishing have been subtracted. According to the Finnish tax authorities, share basis fishermen bear the risks of entrepreneurship and the authorities classify them as self-employed people. It is hard to evaluate the wage level of fishermen, because there are no collective agreements. In addition, the majority of fishermen are self-employed. Many fishermen are part-timers, especially those who work on coastal vessels. Coastal vessels are mainly one-man firms. Coastal

[76] This chapter is mostly based on report "Economic Assessment of European Fisheries. Economic performance of selected European Fishing Fleets. Annual Report 2005".

fishermen comprise about 63 per cent of the employment in commercial marine fishing. Fishermen have learned their profession by working with relatives and friends and they have no formal professional training. Commercial fishing is a male-dominated sector.

Workers

Sector	Number of self-employed fishermen in the sector	Number of employed fishermen in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)
Total of the sector	149	121	0,01 %	90 % (245)	10 % (25)

Source: Statistics Finland

Finnish commercial fishing is a small-scale industry. However, the data given by Statistics Finland do neither include all the commercial fishing[77], nor the fishermen, who are paid on a share basis, with a percentage of the value or volume of landed fish after costs of fuel, have been subtracted. Paying compensation for work on a share basis is very usual practice in fishing occupation in Finland and rest of Europe. So the data given by Statistics Finland underestimate the employment of commercial fishing.

More extensive data about the employment and economy of Finnish commercial fishing and its sub-sectors are gathered by the Finnish Game and Fisheries Research Institute, which has expertise and data in order to overcome the above mentioned problems encountered by Statistics Finland. The institute divides commercial fishing into sub-sectors according to the type of vessels. There were 3,393 registered vessels in Finnish fishing fleet in 2004, although only 330 were in active use. The employment on board was 574 fishermen in 2004. Also while there are many fishermen, only some of them earned enough from fishing to be considered as commercial fishers in 2004. These fishermen accounted for over 90% of the value and the volume of total landings. The fleet is divided into trawlers, gill-netters and coastal vessels. Trawlers dominate the fisheries in terms of volume and value, catching Baltic herring and sprat. Traditional offshore gill-net fishing is gradually disappearing due to the restrictive decisions made by European Union. Small-scale fisheries are a very important part of Finnish fisheries in socio-economic terms, even though their share of landings is limited. They catch various non-quota freshwater fish species along the Finnish coastline of the Baltic Sea. Finnish commercial fishing is practiced only in the Baltic Sea and on the Finnish lakes.

Composition and the economic performance of the Finnish national fleet, 2004[78]

Fleet segments	Number of vessels	Employment on board	Volume of landed fish (1000 t)	Value of landings mEUR	Medium term Economic performance
Trawlers < 24 m	53	99	31,6	4,0	Weak
Trawlers >24 m	24	79	45,6	8,7	Very weak
Gill-netters	15	35	0,6	1,2	Weak
Coastal vessels	238	361	9,2	7,4	ND
Total fleet	330	574	86,9	21,4	ND

Source: Jarno Virtanen (Finnish Game and Fisheries Research Institute) in Economic Assessment of European Fisheries. Economic performance of selected European Fishing Fleets. Annual Report 2005.

Note: The economic performance of coastal vessels is not evaluated, because most of the fisherman running coastal vessels are self-employed part-timers and are not commercial fishermen. So it is not rational to evaluate wages for these fishermen.

[77] The data includes only those enterprises subject to trade tax which operated for more than six months in 2004, with certain conditions relative to the number of people employed and the turnover exceeded.

[78] The table does not include commercial inland fishery. The volume of landings by commercial inland fishery was about 5 million tons and inland fishery employed 300 persons in 2004. All Inland fishermen are self-employed.

There are many things, which create positive preconditions for the future fishing cluster in Finland[79]. Among the most important things are the following ones. There is a high and relatively stable level of consumption of fish products in domestic markets. Fish populations are in good condition both in the Finnish sea area and in the lakes, which permitted an increase in the fishing of non-quota species. The common fishing policy of the European Union has increased the public financial support for the development of Finnish fishing cluster. However, at the same time, there are certain problems. Among the most important problems are the following:

- Low profitability of fishing and low producer prices paid to fishermen, which make it difficult for fishermen to invest in new vessels and to modernise their old vessels.
- The lack of business and management skills among the fishermen: usually fishermen learn their trade by working with relatives and friends and they have no formal professional training. There is supplementary training for fisherman in order to increase the management and business knowledge of fishermen. This kind of training to commercial fishermen is organised by the Federation of Finnish Fisheries Association[80] (Kalatalouden keskusliitto). The Finnish Fishermen's Association organises training, mostly on issues of safety at work.
- The ageing of fishermen: The average age of fishermen is about 50 years and the occupation does not appeal to young generations. Nowadays, there is formal vocational training for the fishing trade, but the educational institutions have difficulty in recruiting students for the courses.
- Low numbers of fishermen, dispersion and the small scale of fishing sector: There are not enough centres of excellence, which would enhance the development of the sector. There is still little co-operation between the entrepreneurs in the fishing cluster. This is partly due to the small scale of the enterprises in the sector. Small enterprises and entrepreneurs have a traditional and suspicious attitude to co-operation.
- The dense seal population reduces the fish catches and damage the fishing tackle. Fishermen and their interest organisation, the Finnish Fishermen's Association argue that during the last ten years, the seal population has grown larger then ever since the second world and this large seal population causes significant economic losses for coastal fishing at northern Baltic sea (Gulf of Bothnia and Gulf of Finland). Insurance firms pay compensation only for broken fishing tackle, but not for lost catches of fish eaten by seals. Damage is only partly compensated. The excess is high and the insurance fees have risen. Unlike the Swedish authorities the Finnish authorities do not pay any compensation to fishermen for the damage caused by seals.
- The bad condition of the Baltic Sea, which is badly polluted in large areas. The discussion of high dioxin content of old Baltic herrings and salmon has destroyed the fishermen's confidence in the future prospects of their occupation and it may have prevented the recruitment of new fishermen.
- Competing interests: The coastal areas of Finnish sea region and lakes are mostly owned by private people and the fishermen have no possibilities to utilise the best fishing areas.

2. Description of the organisations active in the sector at national level

There are no labour market associations and collective agreement on commercial fishing in Finland. The wages and other compensations for work are regulated by individual agreements. The Marine Working Time Act regulates only the working time of wage earners but it does not regulate the working time of owners of fishing vessels and the share basis fishermen.

The Finnish Fishermen's Association (Suomen ammattikalastajaliitto), founded in 1980, is an interest organisation, but not a labour market organisation. The Association represents the interests of commercial fishermen towards the state and the Finnish civil society. The state consults the organisation on issues to do with the fishing sector and fishing policy. In addition, the Association arranges and coordinates the supplementary training given to fishermen. The Finnish Fishermen's Association has about 300 members. Most of the members are private people. Only the owners of biggest vessels (trawlers) represent companies. The members of the Finnish Fishermen's Association catch the major volume of landed fish. The Association (Finnish Fishermen's Association (Suomen ammattikalastajaliittto, FFA) is affiliated to Baltic Fishermen's Association (Itämeren ammattikalastajaliitto, BFA) and a member of Baltic Sea Regional Advisory Council (Itämeren neuvoa-antava toimikunta, BS RAC).

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[79] Sources: "Suomen elinkeinokalatalouden kansallinen strategiasuunnitelma" (The national strategy of Finnish Fishing cluster 2007-2013, draft version III 23.2.2006, Ministry of agriculture and Forestry); interview (21/06/06) of Kim Jordas, managing director of Finnish Fishermen's Association.

[80] Federation of Finnish Fisheries Association is an interest organization of both commercial and non-commercial fishermen. Finnish Fishermen's Association is an interest organization of commercial fishermen.

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

There is no tripartite social concertation specifically for the sector of the Fishing Industry. There are no other kinds of consultation or meetings between the government and the workers' and employers' organisations specifically for the sector of Fishing Industry.

3.2. Description of the bipartite SD in the sector

There is no bipartite social concertation for the sector of Fishing Industry and there are no labour market associations and collective agreements. However, the state authorities consult the Finnish Fishermen's Association (FFA) on issues to do with of the fishing sector and fishing policy.

a) At sector level:

There are neither official nor unofficial players in the field of industrial relations in the fishing sector. There is no promotion of the bipartite SD at sector level.

b) At company level

The terms of employment of wage earners and bonus share basis fishermen in commercial fishing are regulated by individual contracts. Furthermore, the Marine Working Time Act[81] regulates the working time of wage earners. However, the working time of owners of fishing vessels and the share basis fishermen is not regulated by this act.

Comment

The main particularities of Finnish commercial fishing are the following: small scale and seasonal character of the sector and the absence of labour market associations and collective agreements. The seasonal character is a consequence of the Finnish winter. Inland lakes and sea coasts are under ice cover about 3-4 months per year. At this time a major part of commercial fishing is practically at standstill. The small scale of the fishing sector is one major explanation for the absence of labour market organisations and collective agreements. There are few wage earners in the field. Most of the fishermen are self-employed.

[81] The Marine Working Time Act is part of the Finnish labour law. The acts of the labour law, collective agreements and individual contracts have legal status. However, individual contracts and collective agreements must not be in contradiction with the labour law. Furthermore, acts of labour law and collective agreements set the minimum standards of employment. In other words, the terms of employment set by individual contracts must not be worse than the standards set by labour law and collective agreements. Finnish labour law does not set any minimum wages.

FRANCE

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

From a national point of view, the activities described in the NACE classification correspond exactly to the French classification. From the organisations' point of view, the activities are the same except for the FO Fishing federation, which only deals with fishing activities and not related service activities (dealt with by FO in another federation: transport). The SD covers all the activities mentioned above but it is very fragmented according to the kind of fish or port.

1.2. Socio-economic features of the sector

GDP of the sector is 0,14 % (fish farming included)[82]. Production represents 663,100 tons, i.e. 10 % of the EU fishing activities and 9 % of the EU fleet. The French fishing industry is the third largest in the EU. It would seem that an underground economy exists but it is impossible to give an estimate (sometimes the EU quotas are not respected, for instance).
Multinationals are not present in the sector. 95% of the companies are SMEs or very small businesses. Companies are spread throughout the Atlantic coast (1: Brittany: 45 % of fishing); The Mediterranean coast (21 %); other coasts (Nord-Pas-de-Calais, Normandy, etc.); Overseas French regions represent 30% of fish production.

Companies (2003)

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
NACE 5.1	5,686 fishing boats	ND	About 95-98 % (estimate)	About 2-5% (estimate = 145-155 cooperatives)	0 % (estimate)	0% (estimate)

Source: Interviews 2006, French Ministry of Agriculture, Direction des pêches maritimes et de l'aquaculture, 2006

5/6 of the workers are manual/blue-collar workers[83]. Qualification levels are very low, more than 1out 3 employees (34,5 %) has no diploma and 41,7 % has the BEP (almost equivalent to the Vocational Training Certificate). Wages are around the minimum legal wage, plus payment according to the amount of fish, i.e: according to productivity. Atypical work accounts for 20% of work performed and 12% of the workers are female[84]. Characteristics of the sector are the following: very dangerous work compared to other sectors, a lack of qualified trained workers in the future because of an ageing population, and more and more young men refuse to become fishermen.

[82] Source : Comité National des pêches.
[83] No exact data available (mixed with maritime trade).
[84] Source : Ministère du Travail, www.travail.gouv.fr, 2002.

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
NACE 5.1	7,062	20,600 [85]	20,600/25,000,000 = 0.08%	90% (estimate)	10% (estimate)	0% (estimate)	0% (estimate)

Source: Interviews 2006, French Ministry of Agriculture, Direction des pêches maritimes et de l'aquaculture 2006

The following significant developments and trends are observed: decline of the sector because of lack of fish (dwindling resource which has been overexploited), EU quotas, oil prices rising, other countries are more competitive as is fish-farming in France; a very large deficit, leading to the importance of French imports, (85 % of the domestic consumption); privatisation (all activities are already private), no change in the size of companies (in general, very small businesses but there is no tendency to merge. There has also been dramatic reduction in the number of boats in the sector (from 11,600 to 5,600) over the last 20 years.

2. Description of the organisations active in the sector

2.1. Description of the workers' organisations active in the sector

A 1966 national decree legally recognised four confederations as representative at national level[86] : CGT, CFDT, FO, CFTC. All member federations of these four confederations can represent employees in every sector. The trade union membership rate in the Fishing sector is unknown, but is estimated to be very low (less than 4 %: estimate).

a) Fishermen's Union (Syndicat des marins CFTC)

This union was set up in 1981. It covers all fishing activities. It is funded by members' subscriptions, resources from training, etc. and has a staff of 2 people. Its members are blue-collar workers (80 %) and executives (20 %).

It negotiates and signs sector social agreements at sector and company levels, as well as in tripartite concertation. At sector level, this organisation has signed 2 collective agreements. At company level, the number of collective agreements signed by this organisation is impossible to know (they are not counted in France, whatever the sector), but it is estimated that there is no company level agreement in artisanal fishing. This organisation did not sign any agreements in tripartite concertation.

At national level, it is affiliated to CFTC (French Christian Workers' Confederation).

[85] Source : Ministère du Travail, INSEE, enquête emploi 2002.

[86] The Labour Minister's circular of 28 May 1945 sets the criteria for recognition of trade union organisations by the administration: number of declared members, independence, regularity and level of dues paid, experience and seniority, patriotic attitude during the war.

b) Maritime Union (Union Maritime CFDT)

It was set up in 1964. It covers all fishing activities. It is funded by members' subscriptions, resources from training, etc. and has a staff of 20 people. It is the biggest trade union in terms of membership. Blue-collar workers represent 70% and executives 30 %.

It negotiates and signs sector social agreements at sector and company levels, as well as in tripartite concertation. At sector level, this organisation has signed 2 collective agreements. At company level, the number of collective agreements signed by this organisation is impossible to know (they are not counted in France, whatever the sector), but it is estimated that there is no company level agreement in artisanal fishing. This organisation did not sign any agreements in tripartite concertation.

At national level, it is affiliated to the CFDT (French Democratic Confederation of Labour).

c) Public facilities, Environment, Transport and Service Federation - Force ouvrière (Fédération de l'équipement, de l'environnement, des transports et des services-Force ouvrière) (FEETS- FO)

This union was set up in 1948. It only covers fishing activities of the sector. It is funded by members' subscriptions, resources from training, etc. and has a staff of 2 people (estimate). No data available as regards membership (FO refuses to answer). It only includes blue-collar workers (100 %) and employees (no employers, as other worker trade unions do : see employer unions).

It negotiates and signs sector social agreements at sector and company levels, as well as in tripartite concertation. However, concerning industrial fishing at sector level, this organisation refuses to sign because of the confusion in worker and company organisations. At company level, the number of collective agreements signed by this organisation is impossible to know (they are not counted in France, whatever the sector), but it is estimated that there is no company level agreement in the artisanal fishing domain. This organisation did not sign any agreement in tripartite concertation.

At national level, it is affiliated to CGT-FO : -Force ouvriere.

d) National federation of maritime unions (Fédération nationale des syndicats maritimes des marins) (FNSM CGT)

This federation was set up in 1895. It covers all the activities of Fishing. It is funded by members' subscriptions, resources from training, etc. and has a staff of 3 people (estimate). No data available as regards membership. Blue-collar workers represent 80 % (estimate).

It negotiates and signs sector social agreements at sector and company levels, as well as in tripartite concertation. At sector level, this organisation signed 2 collective agreements. At company level, the number of collective agreements signed by this organisation is impossible to know (they are not counted in France, whatever the sector), but it is estimated that there is no company level agreement in artisanal fishing. This organisation did not sign any agreements in tripartite concertation.

At national level, it is affiliated to CGT (General Confederation of Labour).

Workers' organisation(s)

Organisation (English name)	Members		Estimation of the density	Collective Bargaining (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Fishermen's Union (CFTC)	140,000	949	ND	yes	ETF, ETUC	EFAG, ITF, WCL
Maritime union (CFDT)	900,000	5,000	ND	yes	ETF, ETUC	ICFTU, ITF
Public facilities, environment, transports and service Federation-Force ouvriere (FEETS- FO)	600,000 (claimed by FO: 300,000 seem more accurate)	ND	ND	yes	ETF, ETUC	UNI, ITF
Federation of maritime union of the CGT (FNSM CGT)	700,000	ND	ND	yes	ETUC	-

Source: Interviews 2006.

2.2. Description of the employers' organisations active in the sector

All employer unions are legally recognised by the « Code du Travail –livre IV titre 1er "Labour Code, Book IV, title I".

a) Union of French fishing boat owners (Union des armateurs à la pêche de France) (UAPF)

No data are available on its membership (it is estimated that it has gone down considerably). There is no data available on the date of its creation. It is funded by member companies' subscriptions and covers and looks after the interests of industrial fishing activities (big ships). It has a staff of 3 people. Members are overall *big companies.*

It negotiates and signs sector social agreements at sector and company levels, as well as in tripartite concertation, and this, only for industrial fishing activities.

At national level, it is not affiliated to any other organisation.

b) Cooperation, Mutuality and Maritime Credit Confederation (Confédération de la Coopération, de la Mutualité et du Crédit Maritimes) (CMCM)

This confederation was set up in 1905. It looks after the interests of cooperatives, artisans and small employers (very small businesses). It is funded by member companies' subscriptions. It has 1,700 full members (« sociétaires »), 2,500 boats (i.e. 50 % of the French fishing activities), 5,500 fishermen and 2,500 employees (all activities related to fishing and landing of catches etc.). It has a staff of 5 people (estimate).

It negotiates and signs sector social agreements at sector and at company levels, as well as in tripartite concertation.

At national level, it is not affiliated to any other organisation.

c) French Federation of maritime professional unions *(non official translation)* (**Fédération française des syndicats professionnels maritimes) (FFSPM)**

This federation looks after the interests of artisans (membership estimated to be weak). It has an estimated staff of two. It is funded by member companies' subscriptions. Sub-sectors covered by the organisation are artisanal fishing activities. Unfortunately, historic data on this organisation are not available. Indeed, this organisation is very small and has no source of information (e.g. Internet website, newsletter, a responsible, etc.) The only information available concerns the fact that it signs sector social agreements.

It negotiates and signs sector social agreements at sector and at company levels, as well as in tripartite concertation.

At national level, it is not affiliated to any other organisation.

d) Syndicat national des chefs d'entreprise à la pêche maritime (SNCEP)/ National union of undertakers in the fishing sector

No data available[87].

e) Maritime Union of Artisans in the fishing sector (Syndicat maritime des pêcheurs artisans CFDT) (SYMPA)

This union was set up in 1964. It covers all fishing activities. It is funded by members' subscriptions, resources from training, etc. and has a staff of 20 people. It is the biggest trade union in terms of membership. Blue-collar workers represent 70%. All the members are artisans.

It negotiates and signs sector social agreements at sector and company levels, as well as in tripartite concertation. At sector level, this organisation signed 1 collective agreement for the artisanal fishing sector. At company level, the number of collective agreements signed by this organisation is impossible to know (they are not counted in France, whatever the sector), but it is estimated that there is no company level agreement in artisanal fishing. This organisation did not sign any agreements in tripartite concertation.

At national level, it is affiliated to CFDT (French Democratic Confederation of Labour).

f) National Union of artisan skippers in the fishing sector (Syndicat national des artisans patrons pêcheurs (CFTC))

The union was set up in 1981. It covers all fishing activities. It is funded by members' subscriptions, resources from training, etc. and has a staff of 2 people. Its members are blue-collar workers (80 %). All the members are artisans.

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[87] Despite one month (June) of intensive phone calls, the organisation did not give the requested information.

It negotiates and signs sector social agreements at sector and company levels, as well as in tripartite concertation. At sector level, this organisation has signed 1 collective agreement for artisanal fishing. At company level, the number of collective agreements signed by this organisation is impossible to know (they are not counted in France, whatever the sector), but it is estimated that there is no company level agreement in artisanal fishing. This organisation did not sign any agreements in tripartite concertation.
At national level, it is affiliated to CFTC (French Christian Workers' Confederation).

g) National Union of Artisan Fishermen (Syndicat national des marins pêcheurs artisans) (CGT)
The union was set up in 1895. It covers all fishing activities. It is funded by members' subscriptions, resources from training, etc. and has a staff of 3 people (estimate). No data available as regards membership. All the members are artisans.
It negotiates and signs sector social agreements at sector and company levels, as well as in tripartite concertation. At sector level, this organisation has signed 1 collective agreement for artisanal fishing. At company level, the number of collective agreements signed by this organisation is impossible to know (they are not counted in France, whatever the sector), but it is estimated that there is no company level agreement in artisanal fishing. This organisation did not sign any agreements in tripartite concertation.
At national level, it is affiliated to the CGT trade union (General Confederation of Labour).

Employers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation*			European affiliations	Others affiliations
Union of French fishing ship-owners (UAPF)	ND	ND	ND	Yes (only industrial fishing)	Europêche	-
Cooperation, Mutuality and Maritime Credit Confederation (CMCM)	ND	5,500	ND	Yes (all kind of fishing)	COPA-COGECA -Fisheries, FEDOPA, EAPO	-
French Federation of maritime professional unions (FFSPM)	ND	ND	ND	Yes (only artisanal fishing)	-	-
National union of undertakers in the fishing sector (SNCEP)	ND	ND	ND	Yes (only artisanal fishing)	-	-
Maritime union of artisans in the fishing sector CFDT (SYMPA)	ND	ND	ND	Yes (only artisanal fishing)	-	-
National union of skipper artisans in the fishing sector (CFTC)	ND	ND	ND	Yes (only artisanal fishing)	-	-
National union of fishermen artisans (CGT)	ND	ND	ND	Yes (only artisanal fishing)	-	-

Source: Interviews 2006.

<u>Note</u> : An important characteristic in the sector is that the worker organisations (CFTC, CFDT and FNSM CGT) also represent the following employees (artisans): CFTC, SYMPA, CGT.

3. Description of the SD in the sector at national level

Note: In France, a collective *agreement* (“*accord collectif*”) concerns one specific social question, while a collective *convention* (“*convention collective*”) concerns various social aspects of one sector. The fact that there is no national collective convention (“*convention collective nationale »)* clearly indicates the weakness of the social negotiations.

3.1. Description of the tripartite concertation in the sector

There is a tripartite social concertation specifically for the sector of the Fishing Industry, which takes place in an exceptional context, when there is a crisis and in order to adopt measures to modernise the sector. Institutions which organise this concertation are the Labour Ministry and the Agricultural Ministry. All the worker and employer organisations described before are involved in this concertation. The issues which are addressed in tripartite concertation exercises are European Fishing policy, legal minimum wage, training, working time reduction, jobs, security on board, etc. There are no signed agreements or pacts in existence. There is no informal procedure for tripartite concertation.

3.2. Description of the bipartite SD in the sector

The level which is the most developed for the CB is the legal one (organised by the state). This is because of some of the characteristics, such as the archaic and paternalistic aspects of the sector, the strong presence of very small businesses and the reluctance to negotiate from the employers’ side (especially in the artisanal fishing).

a) At sector level

CB in the sector of the Fishing Industry takes place at sector level. However, it hardly exists; there was almost no social negotiation or national collective convention (“convention collective nationale ») until 1997. Only 2 collective agreements (“accords collectifs”) have been signed since 1997 (see below).
Same organisations, as previously described, take part at this level. There is an obligation to participate in CB at sector level, notably for the annual wage negotiation. However, no legal sanctions exist if CB does not take place. Sector collective agreements focus on wages, working conditions, working time, collective issues, etc. and are concluded for an indefinite period. The only conflicts which may exist between players regarding recognition issues concern the FO, which criticises the confusion between employers and employees in workers’ trade unions.

As said before, there are no national collective conventions signed and which remain in force for the moment. The “maritime labour code”[88] organises the sector. In the general Labour code, the fishing sector is specifically mentioned as having specific status. Thus, the general Labour code is respected except if the maritime Code has other specific rules.
Only sector agreements that deal with a type of port or fishing apply, e.g. industrial fishing in the ports of Lorient, Boulogne, and Concarneau, coastal fishing, tuna fishing or tropical tuna (during holidays), the national social agreement on Artisanal Fishing, Industrial Fishing and Pêche industrielle et large scale fishing. The 2 main agreements are: one on professional training (signed by all the organisations in the sector, both workers and employers), which is not in force but nonetheless has been extended for the time being and another one on working time reduction in artisanal fishing, which is in force for the moment and signed on July 6th 2000 by CGT; CFDT; CFTC (i.e. all organisations except FO); FFSPM; SMPP, CCMCM and CGPA. It includes an agreement on wages and paid leave. Their duration is unlimited. It was extended at national level by decree. Thus, the coverage rate for the companies and workers is 100%[89]. All types of workers are concerned.

Obstacles to the development of bipartite SD at sector level are the confusion between organisations of workers and employers.

c) At company level

CB in the Fishing Industry sector takes place at company level, but is only developed in industrial fishing activities (and rare in artisanal fishing activities).
The same worker organisations and UAPF take part in the negotiations (for industrial fishing activities). There is no obligation to participate in CB at company level. There are no conflicts between players regarding recognition issues. There is no collective agreement signed and in force for the moment. However, a collective agreement (“*accord social collectif*”) which concerns

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[88] The “maritime labour code”[88] has a legal origin and is not signed by the social partners.

[89] normally, if the law is respected of course, which is not always the case because of a lack of factory inspectors

training will be extended in the future. There is no player who, although not recognised (or only partially recognised) by the dominant players or by public authorities, must be regarded as playing a role in industrial relations at this level.

As far as players' positions with regard to future developments in the SD at sector and company levels in the sector of Fishing Industry are concerned, the CFTC-seamen hopes that an agreement on minimum legal wages will be reached in the future. The FO hopes that the confusion between workers and employers organisations will cease. UAPF hopes that the SD will improve but thinks it will be difficult because of the economic decline of the sector.

There is no multi-employers bargaining that does not correspond to the sector.

Comment

The sector negotiation is very weak in France in this sector, because of the domination of very small businesses, economic difficulties, the fact that trade union freedom is not respected (confusion between workers and artisans) and paternalistic habits. This situation was accepted when the economic situation was good, but now, these habits are tending to come in for more and more criticism. It is for this reason that the state takes on the responsibility for social issues in the sector.

GERMANY[90]

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

Although the German Federal Bureau of Statistics (Statistisches Bundesamt) uses the NACE classification for the fishing industry (NACE 5; NACE 5.01; NACE 5.01.1; NACE 5.01.2; 5.02), it does not provide data on employment and company structure in this sector. Due to the lack of figures of the federal authority, all the data in this report are based on other sources. The NACE classification used by the German Federal Bureau of Statistics corresponds to the sector covered by the workers' organisation.

1.2. Socio-economic features of the sector[91]

The fish industry in Germany

The annual turnover of the German fishing sector has been declining since 2002. According to data provided by the Federal Bureau of Statistics, only statements on the basis of gross turnover are possible. Accordingly, we obtain the following results for the year 2004, the GDP of NACE 5.1.1 is 0.003%. The difference with the turnover in table 1 derives from the fact, that this is not the gross turnover but the net turnover. For the area of the fishing industry, there are no estimates on the size of the underground economy.

Turnover of fishing and fish products sub-sector in Germany

	Turnover (million EURO)		
	2002	2003	2004
Sea fishing (incl. Ocean-going and coastal fishing)	190	182	177 (- 2, 8 %)
Fish industry	1,952	1,742	1,726 (- 0,9 %)
Imports of fish	2,479	2,281	2,121 (- 7,0 %)
Fish retaill[2]	494	484	470 (- 3,0%)
Fish wholesale	826	862	891 (+ 3,4 %)

Source: Fisch-Informationszentrum (2005): Fischwirtschaft – Daten und Fakten 2005, p. 12, Hamburg, Germany.

The German fishing industry includes fish gastronomy, fish retail companies and fish trading companies.

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

[91] Europêche noted that "The statement, that the fishery is a shrinking or declining sector is misleading. In general, the situation of the catching sector in Germany has been more or less stable over recent years." Further to this comment, the author of the report answered that "In general one can say that the sector has been stable over recent years. But looking back over a longer period (considering the number of fishing vessels and cutters), it is declining."

Structural data of the German fishing industry: Companies, fishing ships/boats and employees

	2002	2003[1]	2004[2]
Production companies in the fish industry	100	94	88
Number of production companies			
Fish trading companies (wholesale)[3]	246	245	245
Fish retail companies[3]	9,900	9,800	9,650
Number of fishing ships/boats			
Deep-sea fishing ships/boats[4]	12	10	11
Coastal fishing ships/boats[5]	2,238	2,201	2,162
Number of employees			
Deep-sea fishing(board staff, land companies)[3]	4,000	3,800	3,800
Coastal fishing[3,6]	4,400	4,400	4,400
Sea fish markets, import of fish[3]	800	800	800
Fishing industry	10,302	9,249	9,004
Fish trading companies (wholesale)[3]	2,676	2,601	2,747
Fish retail companies [3]	18,400	18,100	17,800
Fish gastronomy[3]	4,500	4,200	4,000
Total number of employees	45,078	43,150	42,551

[1] Corrected.; [2] Preliminary.; [3] Estimated by the National Association of the German Fish Industry.; [4] More than 500 BRZ., [5] Including small coastal fishing vessels and vessels for mussels fishing., [6] without sideline fishing business.
Source: Fisch-Informationszenrum (FIZ) e.V. (2005)

According to the data in this table, in 2004 more than 8,000 people worked in the German fishing sector (coastal and deep-sea fishing). Comparing those data with the statistics of the See-Berufsgenossenschaft (Accident Prevention & Insurance Association) it must be emphasised that the number of jobs with a social insurance contribution is much lower. According to the See-Berufgenossenschaft only 283 people worked in 2004 in the deep-sea fishing industry (224 Germans and 59 foreigners). In the sector of coastal fishing altogether 1,698 people were employed in 2004 (1,667 Germans and 22 foreigners). In addition it must be said that in 2004 1,972 people were employed (with social insurance contribution) in the German fishing industry.[92]

[92] Source: See-Berufsgenossenschaft (2005): Verwaltungsbericht 2004, p. 18, Hamburg, Germany.

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees In the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
NACE 5.01.1	ND	1,972 (employees/board staff with social insurance contribution); 8,200 (total employment in coastal and deep-sea fishing)	ND	ND	ND	ND	ND
NACE 5	ND	ND	ND	ND	ND	ND	ND

Source: Fisch-Informationszentrum (2005): Fischwirtschaft – Daten und Fakten 2005, p. 12, Hamburg, Germany; See-Berufsgenossenschaft (2005) Verwaltungsbericht 2004, Hamburg, Germany.

In the sector of deep-sea fishing the number of employees (including management staff) at the end of 2004 was 283. On the basis of estimations by the workers' organization, the total number of employees in this sector (management and employees) was approximately 350.
The differences between the data provided by the See-Berufsgenossenschaft and the German Fisch-Informationszentrum on the number of employees are a result of different counting measures. The first source only takes into account the jobs with a social insurance contribution, while the second source covers all those working in the fishing industry (covering also self-employed people, sideline fishing and family members).
On the deep-sea fishing vessels the employment structure is dominated by male blue-collar workers, predominantly trained on the job or by training programmes within the company. In general, the German fishing industry is a male business, with only a few exceptions. Categories like atypical work do not fit for that sector, because working times, holidays and wages/income often depend on seasonal factors (for further details see below). Due to a comfortable market situation, employees have an average income of round about 22,000 EURO for three months on the ocean. According to the Federal Bureau of Statistics the average monthly gross income of a blue collar worker in the German industry was 2,542 EURO. Taking that into account, the wages in the fishing industry are higher than the average gross income in the industry.
According to estimations by the union, that means an increase in income of about 220% compared to 1995. But as a consequence of the increased productivity the number of employees has been halved in the same period. In the deep-sea fishing, almost all of the employees are qualified by specific training measures according to the German dual training system (training at school and in the company). For the coastal-fishing, the biggest part of the coastal fishing industry is done by part-time business, therefore it is not possible to estimate the qualification structure/level for this sector. Training on the job, nevertheless, is widespread in this area.

Germany (66,000) counts beside Sweden (44,000), Belgium (24,000) and Finland (20,000) to the EU countries with the smallest fishing fleet. At the End of 2004, the German fishing fleet accounted for 2,162 vessels (deep-sea and coastal fishing) with a tonnage of a total of 65,882 GRT and an engine power of 161,342 KW. This constitutes a decrease by 249 vessels compared to the year before. From the whole fleet 11 vehicles (8 froster and 3 swarm fish vessels) or 52,5% of the tonnage and 20% of the machine power are dedicated to the so-called deep-sea fishing (GHF), remaining 2,151 vehicles or 47,5% of the tonnage and just 80% of the machine power on the coastal fishing (KHF; cutter fishing). While the deep-sea fleet processes almost exclusively to frost and swarm fish, fresh fish, crabs and mussels delivers the coastal fishing predominantly. Three out of the 8 froster vessels belong to a company located in Cuxhaven (75 employees), one froster vessel belongs to a company in Bremerhaven, while the remaining 4 froster vessels and the 3 swarm fishing vessels belong to a company located in Rostock. The latter company operates its ships by three independent subsidiary companies in Bremerhaven, Rostoch and Sassnitz-Neu Mukran. The biggest part by far of the German fishing fleet (approx. 2,000 vehicles) is located at the coast of Mecklenburg-Vorpommern and Schleswig - Holstein. These coastal fishing ships are operated as sideline businesses. In general, almost all of the German coastal fishing ships are family enterprises with a single vessel.

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
NACE 5.01.1	2,162	ND	ND	ND	ND	ND
NACE 5	ND	ND	ND	ND	ND	ND

Source: Fisch-Informationszentrum (2005): Fischwirtschaft – Daten und Fakten 2005, p. 12, Hamburg, Germany.

2. Description of the organisations active in the German fishing sector

CB in the German fishing industry (sea fishing and coastal fishing) takes place at company level. According to information from the German union Verdi, the union gave up signing general agreements at sector level at the end of the 1990s. Due to the declining number of companies active in the fishing sector, from the union's point of view only CB at company level makes sense. Negotiation partners are the regional offices of the union Verdi and the representatives of the companies.

2.1. Description of the workers' organisations active in the sector

The present union Verdi is a very young union. In 2001, five trade unions from the service area and the industry close to service as well as the media area, cultural area and educational area merged: die Deutsche Angestellten-Gewerkschaft (DAG) (German White Collar Unions); die Deutsche Postgewerkschaft (DPG) (German Post Union); die Gewerkschaft Handel, Banken und Versicherungen (HBV) (Union Trade, Banks and Insurance); die Industriegewerkschaft Medien, Druck und Papier, Publizistik und Kunst (IG Medien) (Industrial Union for Media, Print, and Paper, Journalism and Arts); die Gewerkschaft Öffentliche Dienste, Transport und Verkehr (ÖTV) (Trade union civil service, transport and traffic), which, before 2001 was responsible for CB in the fishing industry. Verdi is funded by membership subscriptions. It is divided into organisational units at national level, country level, district and city level. It covers 13 departments/branches: financial services, care and waste disposal, health, social services, welfare and churches, social security, education, science and research, federal and state level services, municipal services,, media, art and culture, press and newspapers, industrial services and production, telecommunications, information technology, data processing, postal services, forwarding agencies and logistics, traffic, special services. The union Verdi is the second largest trade union in the Federation of German Trade Unions. Verdi is the trade union of the service branches. About 31,000 members are independent, predominantly from independent professions, in particular from the media branch. In 2004, approximately 5,000 people were directly employed by Verdi. Due to the decrease in the number of members, by 2010, the staff will be reduced to 4,200 people.
There are no formal recognition procedures in Germany. The organisations recognise each other as bargaining partners/parties. Tripartite concertation and bipartite SD in the fishing industry at the sector level do not exist. At company level, the union Ver.di (district Cuxhaven) signed an agreement in 2003 with the company Deutsche Fischfang Union – DFFU (German Fishing Union[93]).
At national level, the organisation is affiliated to DGB (German Confederation of Trade Unions).

[93] It is worth noting that this "union" is a company and is not a union representing workers or employers. European policy plays an important role due to the fact that the question of quotes is decided by the EU. DFFU and the other two companies take an active part in negotiations at EU level, because for them it is necessary to obtain planning security, often up to 15 years ahead. This planning security is necessary for investments in new trawlers and new technologies. So for the German companies EU policy is very important, but so is German policy also.

Workers' organisation

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Ver.di - Unified Service Sector Union	2,4 Mio*	180	180/1,972**= 9.1% or 180/8,200 ***= 2.2%	No	ETF ND	ITF DGB

Source: www.verdi.de and interviews (2005)
*In the end of 2005.
** On the basis of 1,972 employees with social insurance contribution. As Ver.di covers all employees in the fishing industry – not only in the deep-sea fishing- this calculation seems to be the more pertinent.
***On the basis of about 8,200 employees including sideline and family businesses. Note that according to the representative of the union, there are only a few employees in the sideline and family business sector who are ver.di members. Exact data on the number of them is not available.

2.2. Description of the employers' organisations active in the sector

Since 1995 there have been no employers' organisations acting as a social partner for CB. Existing industry associations for the fish industry, as a whole, act as lobby organisations, not as social partners in CB.
Despite the fact, that there is no employer's organisation acting as a partner for CB at sector level, the three remaining deep sea fishing companies work closely together wit regard to bargaining with the German government and to questions of EU fishing policy.

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

There is no tripartite social concertation specifically for the sector of the fishing industry in Germany. Even though, since 2000, the federal government has organised a bi-annual national maritime conference, the fishing industry is not covered by it.
With regard to questions on the rates at EU level, there is close co-operation with the representatives of the German government.

3.2. Description of the bipartite SD in the sector

In the past, CB at sector level only took place in the field of the deep-sea fishing industry. This was for traditional and practical reasons, because these companies have a higher number of employees which could be covered by collective agreements. Due to the fact that the biggest part of the German fishing industry consists of family enterprises and sideline businesses the union has not been able to implement collective agreements in that sector. Until 1995, CB at sector level existed. In 1995, the employers' organisation, Deutscher Hochseefischerei-Verband e.V. (German Deep-Sea Fishing Association) was liquidated by its members, therefore, since that time there has been no CB at sector level. Due to the small number of companies involved in ocean and coastal fishing (NACE 5.01.01) CB only takes place at company level.
There is no promotion of the bipartite SD at the sector level. The fact that the union lacks a partner organisation on the employers' side, which represents the interests of the industry in CB at sector level is and will be the main obstacle for CB at this level.
There is no multi-employers bargaining that does not correspond to the sector. There are no players who, although not recognised by the dominant players or by public authorities, must be regarded as playing a role in industrial relations in the sector.

At company level

CB at company level only exists in one single case. The negotiating partners are the union Ver.di (district Cuxhaven) and the company Deutsche Fischfang Union (German Fishing Union, DFFU – also located in Cuxhaven and owned by an Iceland Holding)). Both partners recognise each other as a true negotiating partner. In that case no other players can be identified.

In 2003, the union and the company signed a collective agreement for the 75 employees of the company. The agreement will end in 2008. The most important regulations of this agreement are: the crew of a ship has to be a minimum of 27 people (in 1995 the minimum crew was 60 people); abandonment of fixed wages (according to the new agreement approximately 21% of the result of one fish catch has to be divided among the crew; the individual share depends on the status of the single employee); The longest fishing trip should not exceed 90 days; The minimum wage is 1,200 EURO.

According to information provided by the DFFU, the collective agreement with the union was one important prerequisite for the improvement of the productivity of the company, e.g. the share of wages of the general sales turnover decreased from 60% in 1995 to 34% in 2005. Besides this, the DFFU invested a great deal of money in new technology (1995-2005: 30 mn Euro) and also paid out huge compensation for dismissals (1995-2005: 4.5 mio Euro). The productivity of the DFFU was also increased by better staff motivation – a further result of the agreement between DFFU and ver.di.[94]

Due to the fact that CB at company level is a voluntary process, there are no procedures for extending this agreement to other companies. But other companies do base themselves on the regulations of that agreement, albeit with some differences.

As far as the partners'' positions with regard to future developments in the SD at company level in the sector are concerned, both the union and the company DFFU welcome the regulations they agreed on in the collective agreement signed in 2003. This being the case both partners will continue the CB process after 2008 (end of the duration of the actual agreement). Due to the fact that the other deep-sea fishing companies adopt certain regulations of the collective agreement between the union and the DFFU, the union hopes that, in the future, it will be possible that all companies in the sector will be covered by similar collective agreements. But that requires a representation of workers' interests within the companies to empower the union's position – and this is not the case.

Comment

Compared to other industry sectors, the German fishing industry (especially the deep-sea fishing industry) is of shrinking importance – for the German economy in general but also for the coastal industry structure in particular. Above all, the present EU fisheries policy has been criticised by the interview partners, because it is based on the point of view of the Spanish or the Portuguese fishing industry with its huge overcapacities. The EU should concentrate their activities on the innovative and resources caring fishing industry which is practiced by the Northern European fishing countries. At national level it was underlined that the ITQ (individual transfer quote which exists in Denmark and Spain) should also be implemented in Germany. It would allow the companies to act with more flexibility due to the fact, that they could manage their fishing quotas amongst themselves.

In the case of the company DFFU, it was mentioned that there is an annual demand of 10 to 15 qualified people. It could be estimated that this is also the case in the other companies. But the problem is that the companies do not meet that demand by providing their own training measures for young people. This disparity must be solved to secure a German fishing industry; even it is a comparatively small industry. DFFU mentioned that there is a lack of support for investments in new building of modern fishing vessels, which would provide better working conditions and a better quality of product.

Probably, CB at sector level will not take place in the future. The industry is too small and due to the fact that there is not an appropriate employers' organisation on the other side, the union has to try to negotiate at company level. But that requires a representation of workers' interests within the companies, and this is not the case.

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[94] Europêche adds that "The social partners, DFFU and ver.di, have worked together for a long time. A contract has been negotiated until 2007. It was difficult to unite, because the cooperation between the union and the fishing company has become more difficult in the past years. The future will show whether the contract can be renewed in 2007. Strictly following the capacity reduction program of the EU, the company DFFU has reduced the fishing crews and has paid large sums into social retirement contracts."

GREECE

1. Description of the sector

1.1. Delimitation and scope of activities

From a statistical point of view, fishing activities come under NACE 05 classification, which comprises the following sub-sectors: fishing, processing and aquaculture. The activities from the point of view of the organisations correspond to those of NACE 05.

1.2. Socio-economic features

Fishing is an important activity in a country surrounded by water and constitutes a source of income for a significant number of local communities. The gross annual income from fishing was 10,880 euros in 2003, but real earnings are steadily falling. Greek fishing is typical of Mediterranean fishing with a large variety of species. Professional fishing consists of coastal fishing, which remains very traditional and has a strong regional character, middle-range fishing and long-distance (overseas) fishing. The most aggressive form of fishing, the one with trawlers, is banned between June 1st and September 30th, so as to allow the reproduction of fish. The less aggressive forms, which include the long line, the purse seines (fishing boats with the acetylene lamps), and nets of various types, lengths and sizes, are allowed all year round. Increasingly, however, the fishing gear used is incompatible with sustainable fishing (e.g. dragged nets, explosives, toxic material, etc.). The value of the Greek landing is steadily decreasing, from 310 million euros in 1997 to 271 million euros in 2004. [95] As local demand exceeds the local catch, large quantities of fish are imported from the EU and third countries. Overall, in 2004, the total catch reached 91,140 metric tons, of which 26.3% came from middle-range fishing and 61.4% from coastal fishing. As far as the underground economy is concerned, it is estimated that there are over 100,000 undeclared amateur fishing boats, with an unknown size of catch that can be either for self-consumption or for sale. No data on the share of the fishing sector in the GDP is available.

The Greek fleet consists of over 20,000 boats for coastal fishing and 650 for middle-range fishing (purse seines and trawlers).[96] There are mostly small firms and self-employed enterprises. The Greek fleet is spread all over continental and insular Greece, with a heavier concentration in Attiki, the Northern Aegean, Thermaikos, Southern Aegean, Sterea Ellada and the Peleponese.

Companies engaged in marine fishing

	Number of companies	% companies without employees	% companies with 0-9 employees	% companies 10-49 employees	% companies 50-99 employees	% companies with › 100 employees
Total of the sector	1,598*	ND	94.6%	4.8%	0.37%	0.19%

* of which 1,111 companies for marine fishing and the rest for aquaculture (no distinct breakdown available regarding size of companies)
Source: National Statistics Service of Greece, “The Business Register”, 2002

Employment in marine fishing has been declining over the years, owing to the ageing of the workforce and the reluctance of the young generation to join the fishing profession. Increasingly, owners of larger vessels recruit foreign crews from non EU countries (especially Egyptians). [97] The number of women working directly in marine fishing is very low. In 2003, women constituted

[95] See Salz et alt., 2006
[96] The distinction made between a coastal fishing vessel and a middle-range fishing vessel is based on the type of fishing gear. In the case of coastal fishing, only static and selective nets are allowed with a specified dimension, whilst purse seines use cyclical nets and trawlers use dragged nets. Coastal fishing is allowed everywhere (except in designated areas), whilst purse seines are allowed to fish beyond 300 meters from the coast and trawlers are allowed to fish 1 mile at least away from the coast, instead of 3 miles which is the rule for the other EU countries.
[97] Often, these migrant workers are not insured and they do not enjoy even the basic employment rights.

6% of total employment in the fishing sector. (see Salz et alt., 2006). The average gross annual income from fishing was €10 880 euros in 2002 (see Salz et alt., 2006). [98] The majority of fishermen on board worked full time (21,137 full-time versus 9,054 part-time). As far as the professional status is concerned (2005, 2nd quarter), self-employed without personnel represent 53%, salaried workers represent 19.7%, self-employed with personnel represent 15.5% and family assistants represent 12% (source: NSSG, LFS, 2005).

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	(Over half of total employment)	14,180	0.32% *	ND	ND	ND	ND

Source: National Statistics Service of Greece (NSSG)
* Source: NSSG, Labour Force Survey 2005 (2nd quarter)
Note: The NSSG only counts people working in fishing vessels with a motor engine above 19 HP, thus excluding the smaller fishing boats. [99]

Workers are generally manual workers. As for the qualifications' level of workers employed in the fishing sector, it is clearly below the national average, with 54.6% have completed the elementary school, 36.2% have completed secondary education and only 9.2% have completed tertiary education, as opposed to 23.4%, 43.6% and 33.0% respectively at the national level. [100]

However, the sector lacks dynamism and its prospects seem bleak. Greek seas are affected from a significant decrease in fishing stocks, owing to over fishing and the inappropriate management of sea resources. Restrictions on the size and the amount of allowed catch are often violated. The most common violation is the fishing and sale of baby fish, which is banned by both national and EU legislation, and the use of dragged nets. Many species are already on the verge of collapse. The situation has further deteriorated in recent years, as a result of growing demand and sophisticated and more effective fishing methods, causing anxiety for the depletion of sea resources and the balance of the marine eco-system. Amateur fishing (which occurs on a large scale during the summer months) creates additional problems to the diminishing fishing stock. The trend might soon become irreversible, to the detriment of fishermen, consumers as well as cultural heritage. [101] An aspect of limited fish stocks and the problems it creates is the long-standing rivalry between coastal fishermen and trawler owners. The former accuse the latter of damaging plants and species living on the sea bed with their gear, whilst the latter claim that coastal fishermen use an unlimited length of nets, and that trawlers are the only ones to abstain from fishing during the 4 summer months; moreover, they emphasise that their vessel is their only means to earn a livelihood, whilst coastal fishermen usually have other activities as well (farmers, tourist industry, etc.). Owners of trawlers complain also about 3 major unresolved problems that middle-range fishing is confronted with: [102] (a) the new regulation on Mediterranean fishing management threatens to destroy the Greek middle-range fishing industry, as it does not take into account the particularities of each country; (b) Greece remains the only country with a 6 (rather than 12) territorial waters strip, no 24 miles economic zone and very deep waters that are unsuitable for fish exploitation; (c) the absence of a fishing agreement with Turkey allows Turkish fishermen to exploit the same seas and to sell their products in the Greek market, but without observing the reproduction period.

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[98] Although data are not comparable, as they come from a different source, the average national wage in 2002 –excluding the farming and fishing sectors- was 16,776 euros (see NSSG, Labour statistics, wages).
[99] See PASEGES, 2003
[100] See NSSG, LFS 2005 (2nd quarter)
[101] See study carried out by the Institute of Sea Biological Resources, mentioned in TO VIMA, 18-8-1996.
[102] According to the President of the Pan-Hellenic Middle Range Union of Ship-owners (PEPMA), Mr. D. Taoultzis. Mentioned in European Commission, 2003.

Greek fishing is confronted with a number of major challenges, the outcome of which will determine the future of professional fishing activities. The most important challenge is the adjustment to the reformed European regulation for the Common Fishing Policy in the Mediterranean that imposes serious restrictions on professional fishing. Other major problems include: the continuous sharp rises in fuel prices in 2005 and 2006, the steadily declining fishing stock, an anachronistic and complicated institutional framework that urgently needs to be updated, codified and simplified, poor quality and inadequate infrastructure (inappropriate port facilities and fishing wharves); Unfair competition from amateur fishing boats and recreational fishing, ineffectiveness and non-enforcement of the fishing regulations. To address these problems, which suggest an uncertain future for the fishing profession (both coastal and off-shore), as well as the related professions, a number of initiatives are urgently needed. Public authorities, aware of the bleak prospects of fishing, are preparing a national plan for fishing, for the period 2007-2013, whose main priorities focus on: the reduction of the pressure exerted on fishing territories, the improvement of fishing methods, the phasing out of public support to private investors for the renewal of fishing vessels (with the exception of improvements related to health and safety standards, working conditions and product quality), the improvement of the scientific assessment of fish stocks, an integrated approach to the management of coastal regions that depend on fishing, the imposition of restrictions (both temporal and spatial) and of "banned zones" and the attainment of safe levels for adult fish in the Greek fishing stock. Moreover, the expansion of fishing activities of trawlers in African countries is at present, also, under consideration: the Greek authorities are offering –through bilateral agreements- to construct fish-wharves in African countries, in exchange for free access to their waters for Greek fishing vessels. [103] However, in view of achieving sustainable development of the fishing sector, some additional measures are needed, such as: the establishment of fishing reserves, allowing the reproduction of fish, as well as the rehabilitation of the eco-system and the preservation of the bio-diversity; an increase in the sanctions imposed for the violation of fishing regulations; [104] the designation of protected areas that observe the delicate stages in the life of marketable fish; the establishment of a control and monitoring system, covering all stages, form catching fish to marketing and consumption.

2. Organisations active in the sector at national level

2.1. Workers' organisation

POA (Pan-Hellenic Federation of Fishing Workers /Panellinia Omospondoia Aliergaton Elladas)
POA was established in 1958 and represents 8 local fishermen's associations (mostly based in Northern Greece) with approx. 1,200 registered members, of which only 477 voted over the last elections held in 2004. The Federation was stronger a few years ago, with a membership of approx. 2,000 organised in 12-13 local associations. The POA is faced with serious financial difficulties, as its funding is restricted to the levy from the Workers' Hearth (Ergatiki Estia) that only covers the very elementary expenses of an office and one employee. The sub-sector covered by the organisation is marine fishing.

Although the national expert for this report did not manage to get a clear answer from the President of the Federation on this issue, it appears that according to the statutes of the organisation, the POA does not have the right to conclude a sector collective agreement. Moreover, the POA does not conclude any collective labour agreements, as the local fishermen's associations each conclude their own agreement, mostly with the owners of middle-range fishing vessels[105], containing different terms and conditions[106].

POA is affiliated to the General Confederation of Greek Labour (GSEE) at national level, but has no European or international affiliations, owing to financial difficulties[107].

[103] See Fintikakis, 2006

[104] The most common violations concern the size of the catch, the total allowed quantity, the non-observance of the reproduction period, and the use of illegal equipment.

[105] The large majority of these middle-range vessels are purse seines (fishing-boats with an acetylene lamp), and only a small number are trawlers.

[106] As a general rule, Greek fishermen are paid a share of the total catch (usually 60%), whilst foreign workers who are recruited seasonally, on the basis of bilateral agreements, are remunerated according to the minimum rates of the National General Collective Labour Agreement.

[107] The Federation is very keen, however, to participate in the process of national and European sector SD, as long as its serious financial problems are resolved.

Workers' organisation(s)

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Pan-Hellenic Federation of Fishing Workers (POA)	~1200 registered members; 477 voting members	~1200 registered members; 477 voting members	ND	No	-	-

Source: author's own research, 2006

2.2. Employers' organisations

PEPMA (Pan-Hellenic Middle Range Union of Ship-owners / Panellinia Enossi Ploioktiton Messis Alieias)

PEPMA was established in 1997 to represent the interests of the owners of larger fishing vessels (mostly trawlers).Its membership consists of approx. 300 middle range ship owners (out of a total of approx. 700). It has a staff of 2 full time employees and its funding comes exclusively from members' contributions.

The Federation does not have the status of social partner and, hence, does not conclude any collective agreements covering fishing workers (mostly from third countries) employed in the larger fishing vessels. It has no national affiliation.

PASEGES (Pan-Hellenic Confederation of Unions of Agricultural Cooperatives /Panellinia Synomospondia Enosseon Georgikon Syneterismon)

PASEGES was established in 1935 and is the leading agricultural cooperative organisation in Greece. Its staff includes 54 full time employees. It represents 746,812 farmers, 6,350 primary agricultural cooperatives and 114 secondary Unions of Agricultural Cooperatives. Amongst its members are the 29 Fishing Cooperatives for Coastal Fishing. Its funding consists of members' subscriptions and of a 2.5% levy on the receipts of ELGA (Greek Agricultural Insurances).

PASEGES has a mutual recognition with OSEGO (Federation of Associations of Agricultural Cooperatives' Employees). It concludes one collective labour agreement with OSEGO, which does not cover fishing workers.

It has no national affiliation.

SAE (Confederation of Greek Fishermen / Synomospondia Alieon Elladas)

SAE was established in 2001 and represents the interests of the owners of 17,500 coastal fishing boats (mostly family-run businesses). Its membership consists of 8 regional federations. It does not have the right to conclude a collective labour agreement and has no national, European or international affiliation. It has, however, initiated the process to become a member of Europêche.

Employers' organisations

Organisation (English name)	Members		Estimation of the density	Collective Bargaining (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
Pan-Hellenic Middle Range Union of Ship-owners (PEPMA)	Approx. 300	ND	ND	No	Europêche	MEDISAMAK*
Pan-Hellenic Confederation of Unions of Agricultural Cooperatives (PASEGES)	6,350 primary agricultural cooperatives and 114 secondary Unions of Agricultural Cooperatives	ND (29 fishing cooperatives for coastal fishing)	ND	(Yes)***	COPA-COGECA -Fisheries	MEDISAMAK ICA IFAP
Confederation of Greek Fishermen (SAE)	ND** (8 regional federations)	ND	ND	No	-	-

Source: author's own research, 2006

*established in 2002, it includes organisations from 11 Mediterranean coastal countries.

**the number of companies engaged in coastal fishing cannot be inferred from the available data.

***as there is no SD at sector level for the Fishing sector, this organisation does not negotiate for this sector. However, it concluded one collective labour agreement with an organisation, which does not cover fishing workers (see below).

3. The SD process

3.1. Tripartite concertation

There is no tripartite social concertation specifically for the sector of Fishing Industry. The competent Ministry of Agricultural Development and Food occasionally holds meetings with representatives of owners of coastal and middle-range fishing vessels (SAE and PEPMA) to discuss the problems they are facing. In view of the drafting of the 4th Programming Period 2007-2013, an experts' working group will be set up, including representatives of organisations involved in fishing, to put forward proposals regarding the national fishing strategy.

3.2. Bipartite SD

There is no institutionalised bipartite SD taking place in the fishing sector, either at sector level or at company level. Workers, at best (i.e. if not employed as undeclared labour), are covered by the minimum rates stipulated in the National General Collective Labour Agreement. [108] There is no promotion of the bipartite SD at the sector level. Bipartite SD is at a stalemate, owing to the fragmentation and weakness of the workers' organisations, and the conflicting interests of the fishing vessels ship-owners (coastal fishing versus middle-range fishing, amateur fishing activities versus professional fishing activities, purse seines versus trawlers, etc.).

[108] It is worth noting that fishing workers are considered as farmers by the social security legislation and are insured by the Organisation of Agricultural Insurance (OGA).

Main players involved

On behalf of workers' organisations, representation is very weak, whilst migrant workers, which often constitute the majority of the crew in the larger vessels, are not represented collectively at all. Coastal fishermen, who constitute a sizeable yet often invisible section of the productive population, are dispersed throughout a plethora of ports scattered all over the country, with a poor infrastructure and a limited productive potential. This restricts their organising capacities and results in their marginalisation from the decision making process. [109] By contrast, middle-range ship owners seem to have greater access to the decision making-bodies at the national and the EU level.

Note also that PEPMA is a player who, although not recognised by the dominant players or by public authorities, must be regarded as playing a role in industrial relations in the sector. As far as obstacles to the development of the bipartite SD at sector level is concerned, PEPMA claims that although middle-range vessels account for a considerable proportion of total fish catch, the federation is excluded from the provisions of law 1361/2000 that sets out the pre-requisites for participating in CB procedures in the agricultural and fishing sectors. Regarding future developments in the SD at sector level and at company level in the sector of Fishing Industry, the players involved agree on the necessity of upgrading their participation in the decision making process and of establishing an effective consultation mechanism that will address the urgent problems of the marine fishing sector (as described in the first section of the report).

Comment

The marine fishing sector in Greece is at an extremely critical and transitional stage: caught between the draconian restrictions imposed by the Common Fishing Policy, on one hand, and the rapidly diminishing fishing stocks on the other, the only viable solution for local fishermen, in areas heavily dependent on fishing, seems to be the development of alternative lucrative activities and the sustainable exploitation of sea resources. As for middle-range fishing, the rational management of fish stock (even at the expense of short-term gains), and the quest for alternative distant, rich fish stocks might provide a viable solution to what seems to be an inevitable yet long expected decline of the largest EU fleet.

[109] See Kallianiotis & Papadopoulou, 2006

HUNGARY

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

The statistical specification of fishing is in accordance with the NACE activity codes used by EUROSTAT and consists of NACE 05.01 and 05.02. There are no divergences between the NACE classification and the structure of employers' and employees' organisations. At enterprise level, CB covers only employees working in the fishing industry.

1.2. Socio-economic features of the sector

Fresh water fishing has on a long history in Hungary, stretching back over several decades. At present, fishing is done over an area of 172,000 hectares, of which 147 000 hectares are natural water and reservoirs, whereas artificial fish ponds account for 25,000 hectares. In addition to these, so-called "industrial fishing" is beginning to assume an increasingly important role. These plants produce 5 to 6 per cent of that which is caught in lakes. Carp fishing constitutes a significant part of fish production in Hungary, around 63 per cent (Új 2005).

In the state socialist economic system, fishing plants were typically in the hands of the state or co-operatives. Due to the privatisation processes, which took place in the early years of the post-socialist transition, in addition to two large state fish plants (Balatoni Halászati Rt., Hortobágyi Halgazdaság Rt.), small- and medium-sized companies also operate in the sector now. These companies, owing to the rulings of the relevant sections of the privatisation law, are in the property of Hungarian owners exclusively. According to the data of the Central Statistical Office (KSH), the number of fishing-related organisations developed from 293 registered organisations of fishing to 329 in 2003. KSH does not provide data concerning the share of the fishing sector in the GDP; however, the data on gross production are available.

Table 1. Value of gross production, million HUF[110]

Year	2002	2003	2004
At current prices	6 534	7 729	8 840
At constant prices	5 092	6 461	8 153

Source: KSH (2004: 24)

Since the transformation period of the 1990s, the agriculture, hunting, forestry and fishing industries have been constantly losing their economic weight with respect to both production and employment figures. The decrease in employment has been significant in the past 15 years in the whole agriculture sector. The available economic data are applicable to the whole sector; however, according to the experts interviewed, the process has by and large affected each area at the same degree.

Table 2. The number of employees (in thousands) and their average wage (in thousand forint) in agriculture, hunting, forestry and fishing

Year	2000	2002	2003	2004
In full-time job	126.0	106.0	100.2	93.5
In part-time job	5.4	7.1	7.4	7.8
Total	131.9	113.1	107.6	101.2
manual work	98.8	82.3	77.6	72.5
non-manual (white-collar) work	27.2	23.7	22.6	21.0
Gross average wage	59 538	82 186	89 273	97 014

110 1 Euro amounts to 250 HUFs, approximately.

Net average wage	40 905	59 101	65 927	70 959

Source: KSH 2005: 67

There is a general trend of decreasing employment in the agriculture sector. The wages paid are way behind the national economy average. Currently, less than 5% of the economically active population works in agriculture. A further characteristic of the employment structure of the sector is the significant weight of "black" or "grey" employment, which the experts estimate at 15-20 per cent of total employment. We have no any reliable data on the qualification level or gender split of the employees working in the fishing industry. Generally speaking, the qualification level is lower than the national average[111] and the sector is dominated by male employees.

The greatest problem for Hungarian fish producers in the past few years has been the appearance of large commercial chains and the price competition generated by them, as well as the opening of markets following accession to the EU. Owing to the latter, the share of imports of relatively cheap sea fish has increased significantly. At the same time, changing consumer demand has considerably weakened the demand for Hungarian fresh water fish.

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
NACE 05.01	ND	ND	ND	ND	ND	ND
NACE 05.02	ND	ND	ND	ND	ND	ND
Total of the sector	329	ND	ND	ND	ND	ND

Source: Hungarian Central Statistical Office (2004) Mezőgazdasági statisztikai évkönyv – 2003 (Statistical Yearbook of Agriculture – 2003), Budapest: Hungarian Central Statistical Office

Workers[112]

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
NACE 05.01	ND	ND	ND	ND	ND	ND	ND
NACE 05.02	ND	ND	ND	ND	ND	ND	ND
Total of the sector	ND	ND	ND	ND	ND	ND	ND

[111] Based on the stakeholders' interviews we can say that the general qualification level of the sector does not reach the secondary school level.

[112] Unfortunately, there is no available data on the inner structure of organisations operating in the fishing industry, nor on the employees working in the sub-sector.

2. Description of the organisations active in the sector at national level

2.1. Description of the workers' organisation active in the sector

Federation of Trade Unions in Agriculture, Fishing and Water Industry / Mezőgazdasági, Erdészeti és Vízügyi Dolgozók Szakszervezeti Szövetsége (MEDOSZ)
The MEDOSZ is the only representative trade union operating in the agricultural sector. Before 1990, there were 19 sector trade unions in Hungary and MEDOSZ was one of them. In 1993, the trade union was restructured and new leadership was elected. The MEDOSZ currently has about 8 000 members in the following sectors: NACE 01 – Agriculture and Hunting, NACE 02 – Forestry, NACE 05 – Fishing. The overwhelming majority of its members are blue collar workers with a low educational level. MEDOSZ has 26 employees at the moment; 13 of them work as a full-time employees. MEDOSZ is financed by its members (in the form of membership subscriptions). In addition to this, it has two hostels and other real estate buildings.
MEDOSZ is a representative and legally recognised social partner in sector level CB, in the field of the agriculture. In the fishing industry there is no sector-level CB. There are only two (state-owned) companies where institutionalised SD takes place. Both the trade unions operating at these companies are members of the MEDOSZ.
The MEDOSZ is a member of the National Confederation of Hungarian Trade Unions (MSZOSZ) which is the largest confederation of the Hungarian trade unions.

Workers' organisation(s)

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Federation of Trade Unions in Agriculture, Fishing and Water Industries	8,000	~250	ND	No	EFFAT	IUF

Source: interviews with the representatives of the MEDOSZ.

2.2. Description of the employers' organisation active in the sector

National Federation of Fish Producers / Haltermelők Országos Szövetsége és Terméktanácsa (HALTERMOSZ)
The organisation is the representative body of the enterprises operating in the Hungarian fishing industry (covered by both NACE 05.01 and 05.02). It was founded in 1989 in order to represent the professional and social interests of the sector. The HALTERMOSZ has now 110 members, representing about more than one third of the Hungarian producers. The organisation represents the interest of their members, provides professional training and runs a fish farm. It is financed exclusively by membership subscriptions.
The organisation is legally recognised. It takes part in the work of the Fishing, Hunting and Water Sector Council supported by the Ministry of Agricultural and Rural Development. As seen above, in the fishing industry there is no sector-level CB and there are only two (state-owned) companies where institutionalised SD takes place. Both of them are members of the HALTERMOSZ, but the trade unions bargain with the management directly at company-level and HALTERMOSZ does not take part in the CB at the company level.
The organisation is not affiliated to any national organisations.

Employers' organisations

Organisation (English name)	Members		Estimation of the density[1]	CB² (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers in member companies of this organisation			European affiliations	Others affiliations
National Federation of Fish Producers	110	ND	ND	No	FEAP, EAA	ICA

Source: www.haltermosz.hu

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

There is no tripartite social concertation specifically for the sector of Fishing Industry.

3.2 Description of the bipartite SD in the sector

3.2.1 SD at sector level

In the fishing industry there is no sector-level CB. However, there is a sector dialogue committee for the sector of agriculture. It is the most important sector institute of bipartite SD relevant for the agriculture, hunting, forestry and fishing industry. In the committee, employees are represented by MEDOSZ, while the National Alliance of Agricultural Co-Operatives and Producers (MOSZ) represents employers. The two trade unions in the fishing sector are members of MEDOSZ; nevertheless, no sub-committee has been set up to deal with the special issues of the sub-sector. This is primarily due to the relatively small weight of the fishing sector (the trade union is present in only two working places).

3.2.2 SD at company level

The SD in the fishing industry is carried out at company level. Indeed, as we have mentioned before, trade unions in the fishing sector are active in only two companies, which are still state owned (Balatoni Halászati Rt., Hortobágyi Halgazdaság Rt.)[113]. This is the partial reason why the sector does not appear as a separate entity in the institutional structures of sector interest reconciliation. Balatoni Halászati Rt did introduce a company level collective agreement. The collective agreement consists of the regulation of the following topics: the partners in the collective agreement; the validity of the collective agreement (i.e. coverage rate); the rules of modifying, cancelling and terminating the collective agreement; the agreement related to the cooperation between the partners signing the collective agreement; creating, modifying and terminating employment relation; rights and obligations with respect to work; rules concerning work order, working hours, holidays, work time frames, shifts; the definition of off-days, holidays; conditions and value of special work; wages and other allowances, benefits; labour law responsibility, employment protection. The collective agreement covers all employees at the company, not only trade union members (around 45% of the employees).

Comment

On the whole, we can say that in the agriculture sector, and within it, in the fishing sub-sector, the unfavourable economic and employment circumstances motivate the social partners to develop and maintain a cooperative model which is more and more founded on the integration of each other's mutual and long-term interests. This motivates all social actors to make reciprocal

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[113] After privatisation, relatively large state-owned companies remained and relatively small- or medium-sized Hungarian owned companies operate alongside them.

concessions on issues of employment, working conditions or wages; in addition, it transforms the themes of labour relations, through, for instance, the re-interpretation of the role of social partners in the training and re-training of employees, which may strengthen the employability of their members.
The companies in the area have had to face numerous economic difficulties in the past years, which have exerted an enormous impact on the development of SD. State-owned fishing companies face significant competitive disadvantage, since they are results oriented, while they also have carry out community duties (such as fish planting for anglers, certain environment protection tasks etc.), the financing of which has to come out of their business income. In the meantime, the place of the small retail trade networks in sales have been replaced by multinational store chains, which, at the same time, has resulted in a significant cut in consumer prices in the market. By joining the European Union, the state of Hungarian fishing companies has deteriorated owing to the import of cheap sea fish products, which went hand in hand with the change in consumer habits as well as a decrease in buying fresh water fish products. These changes are reflected in the revenues of the companies, this, when expenses are fairly constant, means wages have to be kept low. The share of black and grey economy in the sector is high, where employers do not pay contributions after wages. As a consequence, legal employment results in a competition disadvantage for the two state companies, which have to confront the effect of a labour force sucked up by other companies operating in their area, which offer higher wages. An additional feature of fishing—and agriculture in general—concerns its typical seasonality, which leads to the actors establishing working conditions which are different from those of the manufacturing and services sectors.
The position of fishing within the national economy and its employment idiosyncrasies limit the latitude of interest representation. Due to the strong economic pressure, the “traditional”, distributive model has been replaced by a cooperative model, which is integrative, in other words, it is non-zero-valued in its power relations. In practice it means that the parties are trying to mutually consider and synchronise each other’s, primarily middle- and long-range, interests. All this also means the thematic modification of interest reconciliation. Among others, new themes have popped up in SD such as the training of employees.

IRELAND

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

There are three activities in the fishing sector that are taken into account in the Irish statistics. They are sea landings, aquaculture and inland catches. Individual statistics are available on each of these sub-sectors in some cases. All statistics are collected by the Sea Fishery Officers of the Department of Communications, Marine and Natural Resources. Even where Central Statistics Office (CSO) figures are available, they are compiled from pre-existing administrative and statistical sources and function only to bring together in one release the various fishery statistics that are already available.[114]

The Irish Fishermen's Organisations' membership comes from all over the country and includes owners of all sizes of vessels. The Irish Fish Producers Organisation represents owners of commercial sea-fishing vessels and finally, the Irish South and West Fish Producers Organisation has membership of primarily whitefish vessels.

1.2. Socio-economic features of the sector

Total fish production, including aquaculture, was down 9.3% between 2001 and 2002. The value of sea landings and inland catches was €215.4m in 2002, compared to €259.6m in 2001. GDP at current market prices was €130,515m in 2002. The same year, fishing represented 0.17% of Irish GDP.[115] As far as estimated importance of the underground economy is concerned, there is an investigation ongoing in Ireland into alleged over quota fishing. There is also alleged over fishing in Scotland by Irish vessels. The industry is awaiting the outcome of these investigations. Another issue that was raised recently concerns the dumping of illegal nets in Irish waters. The South and West Fishermen's Organisation says that their boats have recovered huge quantities of these nets which have been banned by the EU. The nets go on catching and killing fish after they have been abandoned and are *'a big cost to scarce stocks'.*[116] Most of the coastal regions in Ireland have some form of fishing activity. However, there are five major fishing centres in Ireland: Killybegs in the Northwest, Rosaveal in the West, Castletownbere in the Southwest, Dunmore East in the Southeast and Howth in the East. In some of the Irish fishing centres, fishing and ancillary employment is the main source of work for the local people. In Killybegs and its surrounding District Electoral Divisions for example, virtually all the employment is provided by the 19 fish processors that are located there.[117]

THE IRISH FISHING FLEET STRUCTURE, 2000-2002, IRELAND

YEAR	NUMBER OF BOATS	TONNAGE
2000	1,274	61,262
2001	1,421	65,339
2002	1,376	77,888

Source: Eirestat Spreadsheet Service, Central Statistics Office, Ireland.

Note: More recent data shows that in 2006 the figure has risen to 2,077 fishing vessels.[118]

[114] Central Statistics Office (2003) *Fishery Statistics 2002*, CSO, Dublin.

[115] 2002 figures for GDP are used as this is the last year that figures are available for the value of the fishing industry. GDP figures are available from the Central Statistics Office website – www.cso.ie.

[116] RTE News (7 February 2006) 'Abandoned illegal nets killing fish'.

[117] National Strategy Review Group on the Common Fisheries Policy (1999) *National Investment Priorities for the Irish Seafood Industry 2000-2006*.

[118] Information obtained from The Irish Fishermen's Organisation, May 2006.

Employment in this sector has mainly been self-employment in the past. There has however, been some movement towards employer/employee status in recent years.[119] There are no multi-nationals involved in fishing in Ireland and even the larger companies tend to be family owned and run businesses. Although a lot of the businesses are family run, some have non-related employees and others are increasingly using migrant workers on their boats. Unfortunately, no more data are available on the companies (number and distribution).

Breakdown of Employment in the Irish Fishing Industry, 2004-05

	Full-time	Part-time	Casual	Total	Full-time equivalent (FTE)
Fisheries	3,872	1,165	0	5,037	4,455
Aquaculture	718	744	474	1,936	1,166
Seafood Processing	2,205	728	574	3,507	2,661
Ancillary	-	-	-	1,185	-
Total	6,795	2,637	1,048	11,665	8,281

Source: Figures provided by Bord Iascaigh Mhara (BIM).

Notes:

- BIM, which is the Irish Fisheries Board, include aquaculture in their statistics as it is considered part of the fishing industry in Ireland.
- In 1999, the National Strategy Review Group[120] estimated that the industry, comprising fishing, aquaculture, processing and ancillary sectors, employs 15,832 people directly both full and part-time. The Group found that the *spin-off* activities which include jobs in processing, packaging, transportation and marketing on the production side and in fishing gear manufacturing, chandlers and maintenance on the servicing side, bring the figure to around 25,000 people employed.

The hours worked by people involved in the fishing industry differ depending on what kind of catch the fishermen are seeking, for example, lobster fishermen have to leave very early in the morning whereas trawlers may stay out all night with the workers sleeping intermittently.[121] Remuneration in the sector varies quite a lot and no estimate is available of the average wage for fishermen. For vessels which operate on a self-employed basis, a share based system is used rather than a wage system in the Irish fishing industry, in which a fisherman or woman is paid a share of the value of the catch.[122] This pay situation has caused Social Welfare problems for fishermen in the past, as the class of Pay Related Social Insurance (PRSI) Contributions that a person pays is related to their employment status and whether they are employees or self-employed. Their status was not always clear-cut. Some of these issues were resolved in 2004 by the then Minister for Social and Family Affairs and other stakeholders.[123] More recently, a solution has been found which satisfies those vessels that wish to remain self-employed and those who wish to operate under an employer/employee system.[124]

PROCESSING AND PRESERVING OF FISH AND FISH PRODUCTS, IRELAND

Category	1999	2000	2001
Net Output €m	87.6	104.0	93.0
Wages and Salaries €m	41.8	40.9	44.7
Number of Persons Engaged	2,645	2,568	2,802

[119] Ralaheen correspondence, 25-07-06.

[120] National Strategy Review Group on the Common Fisheries Policy (1999) *National Investment Priorities for the Irish Seafood Industry 2000-2006*. Pg. 5.

[121] Ralaheen Interview, 22 May 2006.

[122] Ralaheen Interview, 22 May 2006.

[123] Anne Murray (2004) 'Social Welfare Issue affecting Fishermen Resolved', story in the Marine Times.

[124] Ralaheen correspondence, 25-07-06.

Source: Central Statistics Office (2003) *Fishery Statistics 2002*, CSO, Dublin. Pg. 10.
Note: Although processing is not included in the remit of the study, it is included within the Irish Statistics as part of the fishing industry.

The fishing industry mainly consists of men, although there are some women working on fishing vessels. Often, these will be family members of the vessel's owner. There are, however, a small number of women who have a Skipper's Ticket.[125] According to the Gender Equality Unit of the National Development Plan (NDP), in 2002 women accounted for 7.81% of fisheries employment in Ireland, while men account for 92.19%.[126] A number of certificates are available to those working in the Irish fishing industry such as the Skippers Ticket, which has different levels to complete in order to captain different size vessels. The Department of Communications, Marine and Natural Resources certify the Skippers Ticket. Other workers on board the vessels may have different qualifications, such as engineering qualifications, and all workers have to do basic safety training.[127]

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector[128]	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	ND	4,455	0.24% of 1,836,200 in employment	ND	ND	ND	ND

Source: Figures provide by BIM and CSO

According to Technology Ireland, the Irish fishing industry has undergone some important changes in recent years, including the upgrading of many of the fishing vessels. From 2001, 19 of the 23 super trawlers in the pelagic fleet were replaced at a cost of €200 million. There has also been an ongoing move to replace safety equipment on 500 vessels. Significant investment in the fishing industry has continued in recent years, reaching record levels in 2003.[129] In 2003, the export trade in Irish seafood was faced with *'competitive and challenging international markets'*.[130] Exports are estimated to have declined by 10% between 2002 and 2003, mostly in the salmon and pelagic fish categories. However, this same period was more positive for shellfish and whitefish products, with exports to Spain increasing by 10%.[131] Although the industry has undergone some tough times, it does not appear to be in decline. A lot is being done, at present, to promote Irish fish abroad as a quality product.

2. Description of the organisations active in the sector at national level

2.1. Description of the workers' organisations active in the sector

Irish fishermen[132] are not unionised. The Seaman's Union of Ireland have had some contact with a number of fishermen about this but as yet nothing has transpired from this.[133]

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[125] Ralaheen Interview, 22 May 2006.
[126] See www.ndpgenderequality.ie.
[127] Fishing Vessel (Basic Safety Training) Regulations 2001 (S.I. No. 587 of 2001).
[128] Figures available are full time equivalents that are both employees and self-employed, 2004-2005.
[129] Technology Ireland Yearbook, January 2005. See www.technologyireland.ie.
[130] See Bord Iascaigh Mhara website, section on Seafood Export Trade 2003. www.bim.ie.
[131] See Bord Iascaigh Mhara website, section on Seafood Export Trade 2003. www.bim.ie.
[132] This means fishermen who do not own vessels. Many of those that own vessels are represented by one of the fish producers' organisations.

2.2. Description of the employers' organisations active in the sector

It is important to note that the fishing organisations in Ireland, while classified as producers' organisations are mostly made up of fishermen who own their own vessel/s. There are a number of fishermen's or fish producers' organisations in Ireland. Some of the larger ones are outlined below.

a) The Irish Fishermen's Organisation (IFO)[134]

The Organisation was founded in 1974 and membership is open to all Irish registered fishing vessels, regardless of size or fishing activity. The Organisation's mandate, as stated by the IFO, is to represent the professional interests of Irish commercial fishermen at national and international level; to provide a forum for discussion on fishery matters; to formulate proposals for fisheries development, and to use whatever means are open to it to have such proposals put into effect; to promote, assist and engage in any trades, businesses and activities which appear to further the interests of our members; to borrow any monies required for the purpose of company on such terms and security as may be determined; to invest any monies at the disposal of the company in such manner and upon such terms as may be determined; and generally to concern itself with any developments which it considers as being of interest or benefit to Irish fishermen. The IFO is funded through subscription from its members. It employs three full-time staff. Its membership consists mostly of self-employed fishermen or women so the organisation does not fit perfectly under the heading of 'employers' organisations'. However, it takes part in sector SD at a European level through Europêche. The IFO represents the interests of its members and others not affiliated to a producers' organisation.

The IFO is a company limited by guarantee and is an Independent National Organisation. It is a member of the working groups of the Advisory Committee on Fisheries and Aquaculture (ACFA), the Sea Fisheries Liaison Committee, the Irish Marine Search and Rescue Committee and the White Fish Advisory Committee. It is represented on the Salmon Management Commission and is a Vice President of the North Western Waters Regional Advisory Council (RAC).

IFO has no national affiliations.

b) The Irish Fish Producers' Organisation (IFPO)[135]

The Organisation is a body which represents owners of commercial sea-fishing vessels. The IFPO was set up in 1975 for fishermen based coast-wide. It was established at the instigation of the European Union as part of the organisational structure necessary for the operation of the Common Fisheries Policy and has specific responsibilities under various EU regulations. The IFPO maintains a watchful eye on developments that may impact its members' commercial activities in both catching and marketing fish, with a view to making the best possible use of the available fish stocks and optimising returns. The organisation has three employees and is funded through membership fees. It comprises a Board of Directors elected by its members, a Chief Executive, and a supporting secretariat.

The Irish Fish Producers Organisation has legal recognition as a Producers Organisation and is recognised by the various players in the organisation and the Government.

Through its European membership, the IFPO is linked to counterparts in other member states. At national level, the IFPO is affiliated to the Irish Co-Operative Organisation Society (ICOS).

c) Killybegs Fishermen's Organisation (KFO)[136]

The Organisation was set up in 1979 and membership is open to owners and part-owners of EU registered commercial fishing vessels. Members must comply with the organisations rules and pay an annual levy to finance the KFO. A number of services are offered to KFO members which include: representing and negotiating on behalf of members' fishing interests at national and EU levels; advising members on fishing-related issues such as licences, capacity and accessing available grant aid; acting as an information source on key fishing issues such as, Total Allowable Catches (TACs) and quotas; facilitating the setting up of group schemes for members benefit, such as pensions, vessel and health insurance; providing access to financial support mechanisms in case of major market price fluctuations; alerting members to key EU and national decisions that are being taken and will effect their livelihood; supplying and sourcing additional opportunities

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133 Ralaheen correspondence with the Seaman's Union of Ireland, 17 November 2005.
134 Information from a Ralaheen interview, 22 May 2006.
135 Information from www.icos.ie.
136 Information from www.kfo.ie.

that will benefit members, such as new fisheries opportunities/agreements, and e-commerce; and helping to resolve fishing related problems experienced by members or groups of members.[137]
Five people are employed on a full-time basis by Organisation.
The Organisation is a company limited by guarantee and has legal recognition as a Producers Organisation and is recognised by the various players in the organisation and the Government.
At a regional level, the KFO is a member of the North Western Regional Advisory Committee (NWRAC). At national level, KFO is affiliated to ICOS.

d) The Irish South and West Fish Producers' Organisation (IS&WFPO)[138]
The Organisation was established in 1995 and represents fishermen from the south and west coast of Ireland. Its membership mainly consists of whitefish vessels ranging from 12m to 30m. Like the other fish producers' organisations, IS&WFPO was originally devised as a means to encourage implementation of market stability mechanisms with the EU. Fish producers' organisations have other functions which include: improving and guaranteeing where possible a fair income to producers; regulating the market in order to adjust supply to market demand; and promoting the application of common market standards. The IS&WFPO consists of a Chairman, Secretary, Manager and Board of eleven Directors who represent the members from the different areas of operation. The Organisation is funded through annual membership levies. The IS&WFPO employs five full-time and 1 part-time staff.
The IS&WFO has legal recognition as a Producers Organisation and is recognised by the various players in the organisation and the Government.
The Organisation is affiliated to the EAPO. It has no national affiliates but it works together with the other producers' organisations when national issues arise.

Employers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
Irish Fishermen's Organisation	ND	ND	ND	No	Europêche	-
Irish Fish Producers' Organisation	ND	ND	ND	No	EAPO	ICOS
Killybegs Fishermen's Organisation	ND	ND	ND	No	EAPO	ICOS
Irish South & West Fish Producers' Organisation	ND	ND	ND	No	EAPO	-

Source: Ralaheen Interview and Internet

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

There is no tripartite SD specifically for the fishing industry in Ireland.

[137] See www.kfo.ie.
[138] Information from www.irishsouthandwest.ie.

3.2. Description of the bipartite SD in the sector

As fishermen are not unionised in Ireland, there is no promotion of sector SD. The employer-employee relationship in the Irish fishing industry is not always straightforward. Many fishermen are self-employed and are members of a fish producers' organisation, as opposed to a trade union. As well as this, many of the workers on fishing vessels are family members of the vessel's owner, thus making it more unlikely that the workers will become unionised. No major changes to the SD in the fishing industry were discussed during the course of the study.

a) At sector level

There is no sector level CB for the fishing industry in Ireland. However, the four main producer organisations have a good working relationship and frequently come together to address issues of a national interest. The Irish Fishermen's Organisation participates in European level sectoral SD through Europêche.

The fishermen's and fish producers' organisations do, from time to time, hold talks with various stakeholders in the sector, for example, they may meet with the Minister of Communications, Marine and Natural Resources to discuss a particular issue. There are also a number of Working Groups and Committees of which the organisations are part.

b) At company level

Most of the fishing fleet in Ireland consists of self-employed people or family run businesses. Coupled with the fact that Irish fishermen are not unionised, company level SD does not appear to play a significant part in the Irish fishing industry. Most fishermen who own their vessels are members of one of the 'employers' or fish producers' organisations even though they are self-employed. The line between employer and employee organisations is blurred.

Comment

Fishing is an important sector in Ireland. Although it only accounts for 0.17% of GDP, some coastal regions are almost entirely reliant on fishing, its related services and *spin-off* employment. A number of changes are happening in the industry at present. Although the fleet now stands at 2,077 boats, exports have declined slightly in recent years. Despite this, significant money is being invested in the sector and an upgrade of much of the fleet has taken place in recent years. There has also been an ongoing move to replace safety equipment on 500 vessels. Fishermen in Ireland are not unionised. However, many of them are self-employed and are members of one of the fishermen's or fish producers' organisations. There was no evidence of CB in the fishing sector at either a sector or company level although sector level dialogue does take place from time to time between the producer organisations around various issues at a national level.

ITALY

1. Description of the sector's characteristics at the national level

1.1. Delimitation and scope of activities in the sector

From the statistical point of view, following the Ateco 2002 classification deriving directly from the NACE Rev. 1.1, in Italy the class Fishing (05.01) is sub-divided into two categories: Fishing in sea or inland waters and related service activities (05.01.1), and Fishing in fresh water and related service activities (05.01.2).

From the point of view of interest representation, the sector is linked to agriculture and the food industry, especially on the workers' side. The sector is covered by three industry-wide agreements (*Contratti Collettivi Nazionali di Lavoro* – CCNLs)[139]. The most representative one is for sea fishing firms, which have been defined as those companies carrying out the activities of coastal (within 6 or 20 miles), deep sea (beyond 20 miles), and oceanic fishing. Another one is for the land personnel of sea fishing and fish farming co-operatives. A less important agreement applies only to the sea fishing co-operatives that are affiliated to UNCI.

1.2. Socio-economic features of the sector

Considering the geographical configuration of Italy as a peninsula in the middle of the Mediterranean Sea, it follows that the fishing industry represents a relevant sector in the country. Referring to the national economic accounts provided by the National Institute of Statistics (Istat), in 2003 production in Fishing, fish farming and related service activities (Ateco division 05) amounted to 1,636 million euro (0.07% in the country), while the produced added value reached the amount of 1,340 million euro in 2004 (0.11% of the whole economy). There are no sector data on the GDP.

Taking as a reference the InfoCamere[140] database named Movimprese, providing data on the birth/death rate of Italian companies, the number of registered companies active in the sector (including both fishing and fish farming) at 2005, December the 31st, was 11,492 (0.22% of total in the country). Furthermore, in 2005 there were only 148 new registrations in the sector in comparison with 646 companies which closed down, showing the very low dynamism of this industry in Italy at the present time. Referring to the 8th National Statistical Census on Industry and Services (available since 2004 and providing data updated to 2001), there are 6,719 companies in Fishing or 0.17% of the total in the country (Ateco class 05.01). With regard to the legal form, firms are mostly individual companies (3,884, 57.81%), and partnerships (2,124, 31.61%). Co-operatives are not more than 9.52% (640), while incorporated companies and other types of companies represent only a small part (71, 1.06%). Geographically, most companies are in the Northeast (41.03%). The rest are 21.07% on islands, 17.32% in the Centre, 16.97% in the South, and only 3.60% in the Northwest.

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with < 10 employees	% companies with 10 to 49 employees	% companies with 50 to 249 employees	% companies with > than 249 employees
Sub-sector 05.01.1	6,564	47.84	42.93	7.95	1.19	0.09
Sub-sector 05.01.2	155	69.68	18.71	10.32	1.29	0.00
Total of the sector 05.01	6,719	48.34	42.37	8.01	1.19	0.09

Source: Istat, *8th National Statistical Census on Industry and Services* (2001)

[139] The European Employment and Industrial Relations Glossaries (EMIRE) define CCNLs as agreements which are "concluded at national level between employees' and employers' sector federations", and whose "sphere of application is the homogeneous product sector, which usually corresponds to an industrial category (such as, metalworking, textiles, construction, chemicals)". Under the Agreement of 23 July 1993, the industry-wide agreement constitutes the first and leading of the two levels in the Italian bargaining structure.

[140] InfoCamere is the Italian private company which created and now administers the national information system linking up the 103 provincial Chambers of Commerce and their 300 branches.

According to the Census on Industry and Services, regular workers in the sector are 34,235, of which 69.91% are employees and 29.79% self-employed workers. Non-standard workers represent only 0.30% of total employment in the sector. In detail, workers with a non-standard contract of employment are only 103, almost exclusively so-called "coordinated freelance workers" (*collaboratori coordinati e continuativi* or co.co.co.). As to the gender repartition, women working in the sector represent only 11.08% of the total number of workers (excluding non-standard workers), whereas men account for 88.92%. The weight of non-regular employment in Fishing, fish farming and related service activities (Ateco division 05) was estimated by Istat at a very high level in 2002, approximately 58.9% (about 20,900 workers). This is the only available source of information on the weight of the underground economy at sector level. Finally, there are no data on wage and qualification levels in the sector.

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector / total number of employees in the country (%)	Number of employees in companies < 10 employees in the sector / number of employees in the sector (%)	Number of employees in companies 10-49 employees in the sector / number of employees in the sector (%)	Number of employees in companies 50-249 employees in the sector / number of employees in the sector (%)	Number of employees in companies > 249 employees in the sector / number of employees in the sector (%)
Sub-sector 5.01.1	9,958	23,361	0.23	44.58	29.87	20.02	5.53
Sub-sector 5.01.2	240	573	0.01	24.97	36.96	38.07	0.00
Total of the sector 5.01	10,198	23,934	0.23	44.12	30.04	20.44	5.40

Source: Istat, *8th National Statistical Census on Industry and Services* (2001)

The sector, including fishing and fish farming (Ateco division 05), went through a period of growth during the Eighties and then a slowdown in the Nineties. Focusing the analysis on the period from 1991 to 2001, it is possible to observe a slight increase in the number of firms, from 8,088 to 8,345. On the other hand, Istat's Labour Force Survey Historical Series show a progressive decrease in the number of workers, from 46,700 in 1991 to 34,500 in 2003, and a trend of slower decline in the number of employees, from 21,600 to 18,100.

2. Description of the organisations active in the sector at national level

Trade union organisations are free associations. Membership subscriptions are the main financial source. Actually, the trade unions' financial asset comes out of both membership subscriptions – constituting the trade unions' patrimony and being submitted to general financial laws – and State contributions. The latter are corresponded by the State to finance the tax and patronage services provided by both workers' trade unions and employers' associations. Internal financial distribution may differ from one organisation to another. In any case, funds are granted to all structures.

Information on the number of employees working for the representative organisations is rarely available. In general, trade unions benefit not only from the services of their employees, but also from other resources, such as voluntary workers and delegates. The latter are not trade unions' employees: they remain employed within their original firms, as they can have temporary or full leave to carry out trade union work. Sector organisations are often reluctant to give information on their staff. Therefore, there are no data on the organisations operating in the sector.

The lack of the ordinary law *ex* Article 39 of the Italian Constitution makes the representation system highly informal and uncertain[141] (also on the employers' side), based only on *mutual recognition*.

2.1. Description of the workers' organisations active in the sector

Workers' representation in Italy is both horizontal and sectoral: sector federations are, nevertheless, structures of general trade unions. Despite the fact that sector federations have autonomy in collective bipartite negotiations, they usually behave according to inter-federal strategies, especially in the field of social and industrial relations policies.

[141] Decree-Law No. 396/1997 represents an exception only for the public sector.

The most representative trade unions and the dominant players within the sector are the following: FLAI-CGIL; FAI-CISL; and UILA-UIL. These trade unions have a sort of "oligopoly" of interest representation in the sector, and are signatories of the two main industry-wide agreements on the workers' side. A fourth trade union, the FESICA is signatory of a separate industry-wide agreement together with its counterpart UNCI. Even though these organisations are not recognised by the dominant players at sector level, the lack of a law on representativeness implementing Article 39 of the Italian Constitution made it possible for them to sign a separate CCNL.

a) FLAI-CGIL (Agro-Industry Workers' Federation, Federazione Lavoratori Agro Industria)
FLAI is the main trade union in the sector. There are no data on the historic (date of creation, evolution) of this organisation. It is a sector federation of CGIL and represents all types of workers that are occupied in the food industry and agriculture. Furthermore, it is signatory of twenty industry-wide agreements.

b) FAI-CISL (Agriculture and Food Workers' Federation, Federazione Agricola Alimentare Ambientale Industriale)
FAI, a sector federation of CISL, is the second trade union in the sector. There are no data on the historic (date of creation, evolution) of this organisation. It gathers together all types of workers that are occupied in the food industry and agriculture, and is signatory of twenty industry-wide agreements.

c) UILA-UIL (Food Workers' Union, Unione Italiana Lavoratori Agroalimentari)
UILA, a sector union of UIL, was officially created on 1994, February the 1st, from the merger of two agriculture and food unions. On 2004, October the 7th, UIL formed a fishing industry workers' trade union within UILA itself, named UILA Pesca. While UILA, FLAI and FAI are wide organisations including food and industry, only UILA has created a specific organisation representing fishing. Hence, UILA Pesca is part of UILA. UILA represents all types of employees in agriculture and the food industry, and is signatory of twenty industry-wide agreements.

d) FESICA (Federation of Industry Trade and Handicraft, Federazione Sindacati Industria Commercio e Artigianato)
The autonomous FESICA was born in 1992 and is affiliated to Confsal. At present, it is not recognised by the dominant players at sector level, since its representativeness is unknown[142]. Therefore, FESICA plays a marginal role within the sector. In general, it is a signatory of eleven separate industry-wide agreements together with specific counterparts, which are mainly employers' autonomous associations.

Workers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector (NACE 05)			European affiliations	Other affiliations
Agro-Industry Workers' Federation, FLAI-CGIL	289,170	ND [1]	ND [1]	yes	EFFAT, ETF	-
Agriculture and Food Workers' Federation, FAI-CISL	205,079	ND [1]	ND [1]	yes	EFFAT	-
Food Workers' Union, UILA-UIL	146,691	ND [1]	ND [1]	yes	EFFAT	-
Federation of Industry, Trade and Handicraft, FESICA	ND	ND	ND	yes	-	-

Source: Direct contacts with each organisation (2005)
[1] Sector data are not available for FLAI and FAI, because there is no specific membership for the fishing sector. As for UILA, sector data are currently not available, as UILA Pesca was only created at the end of 2004

142 It is a small organisation covering a wide range of sectors but being slightly representative.

2.2. Description of the employers' organisations active in the sector

Employers' associations have many vertical structures: as a rule, employers join their territorial structures and, through them, the national one. The territorial structures are also entitled to negotiate collective agreements at a decentralised level (territorial or company).

The most important player within the sector is Federpesca, which is signatory of the most important industry-wide agreement in the sector, in addition to the CCNL for the personnel of industrial firms producing fishing nets[143]. On the other side, there are three organisations representing a relatively small number of co-operatives and signing a specific industry-wide agreement for the land personnel of sea fishing and fish farming co-operatives: Federcoopesca; Lega Pesca and AGCI Agrital. Finally, UNCI Pesca is signatory of a separate industry-wide agreement for sea fishing co-operatives together with the autonomous trade union FESICA.

a) Federpesca (National Federation of Fishing Enterprises, Federazione Nazionale delle Imprese di Pesca)

Founded in 1961, Federpesca is part of the Confindustria system and represents companies carrying out fishing and related service activities. Within the association, members are organised in three national consortiums: the National Consortium of Coastal and Mediterranean Fishing Companies; the National Consortium of Oceanic Fishing Companies; and the National Consortium of Industrial Activities of the Fishing and Net-making Sectors. Together with the main trade unions, since 1994 Federpesca takes part in the National Joint Monitoring Body for the Fishing Industry Sector (*Osservatorio Nazionale della Pesca*) and in the National Fisheries Joint Monitoring Body (Ebipesca) established by the CCNL. At the national level, it is also member of Federmare (Italian Maritime Cluster Federation, *Federazione del Sistema Marittimo Italiano*) and is represented within the IPSEMA (National Insurance Institute for the Fishing Industry Sector, *Istituto di Previdenza per il Settore Marittimo*). At the European level, it is member of the Association of National Organisations of Fishing Enterprises of the EU Countries (Europêche). At the international level, it is member of the Association of Mediterranean Fishing Professionals (Medisamak).

b) Federcoopesca (National Federation of Fisheries Co-operatives, Federazione Nazionale delle Cooperative della Pesca)

Federcoopesca was founded on 1950, April the 25th. At national level, it is affiliated to the Confederation of Italian Co-operatives (Confcooperative), which was set up in 1919 following the split between Legacoop and its Catholic component. It represents 466 co-operatives employing 8,537 workers and 16,180 partner workers, and producing annual sales revenue of 405 million euro. It is, thus, regarded as the most important organisation in the fishing co-operatives' sector.

c) Lega Pesca (National Association of Fishing Co-operatives, Associazione Nazionale delle Cooperative di Pesca)

Founded in 1962 as Associazione Nazionale delle Cooperative di pesca e Affini (ANCPA), it took the current name in 1995. Lega Pesca is a sector association of Legacoop, whose origins can be traced back to October 1886, when 248 enterprises with more than 70,000 partner workers, originally inspired by both lay socialist and Catholic values and principles, formed the National Federation of Co-operatives, which was turned into National League of Co-operatives in 1893. Today, Legacoop is the most important organisation representing co-operatives in Italy, gathering together 13,000 co-operatives with about 385,000 workers and 6,5 million partner workers.

d) AGCI Agrital (Association of the Agri-Food and Fishing Sector, Associazione del Settore Agro-ittico-alimentare)

AGCI Agrital is a sector association of AGCI. AGCI was founded in 1952, but was officially recognised only on 1961, December the 14th, by Ministerial Decree. It is organised in two departments, Fishing and Agriculture, and gathers together a total of 950 co-operatives, having something like 52,500 partner workers.

e) UNCI Pesca (Union of Italian Fishing Co-operatives, Unione Nazionale Cooperative Italiane della Pesca)

UNCI Pesca was founded in 1991 by UNCI, which was born in 1971 from the split of a component of Confcooperative. Inspired by Catholic principles, UNCI declares to represent about 20% of Italian co-operatives. As for UNCI Pesca, it gathers together fishing and fish farming co-operatives, but the amount of its members is actually unknown.

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143 Actually, this industry-wide agreement is linked to the textile industry sector and, in fact, was signed together with FILTEA-CGIL (Italian Textile and Apparel Workers' Federation, *Federazione Italiana Lavoratori Tessili e Abbigliamento*), FILTA-CISL (Italian Federation of Textile and Apparel Workers, *Federazione Italiana dei Lavoratori Tessili e dell'Abbigliamento*), and UILTA (Italian Textile and Apparel Workers' Union, *Unione Italiana Lavoratori Tessili e Abbigliamento*). It was signed the first time in 1956 and was renewed the last time on 2004, June the 15th.

Employers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation (NACE 05)	Total number of workers who are working in the companies members of this organisation			European affiliations	Other affiliations
National Federation of Fishing Enterprises, Federpesca	about 2,200	ND	about 26.3%	yes	Europêche	Medisamak
National Federation of Fisheries Co-operatives, Federcoopesca	466 co-operatives	24,717 [1]	ND [2]	yes	COPA-COGECA	ICA
National Association of Fishing Co-operatives, Lega Pesca	477; 436 co-operatives [3]	14,300	ND [2]	yes	COPA-COGECA	ICA
Association of the Agri-Food and Fishing Sector, AGCI Agrital	480 co-operatives	8,971	ND [2]	yes	COPA-COGECA CECOP	ICA
Union of Italian Fishing Co-operatives, UNCI Pesca	ND	ND	ND	yes	-	-

Source: Direct contacts with each organisation (2005)

NB. Density is calculated on the basis of 2001 data on employment, and therefore might be slightly under/overestimated, depending on recent sector trends

[1] It includes 8,537 workers and 16,180 partner workers

[2] As the sum of the densities largely exceeds 100% of co-operatives, it follows that the data on the number of members (and the number of workers/partner-workers as well) provided by the organisations are largely overestimated. As far, according to the data on partner workers, Federcoopesca should be regarded as the most representative organisation in the fishing co-operatives' sector

[3] It includes also 16 producers' organisations and 25 companies

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

In accordance with Art. 1 of Law No. 38/ 2003, Legislative Decree No. 154/2004 established the creation of:

a) A permanent Tripartite Committee named "*Tavolo Azzurro*", coordinated by the Ministry of Agricultural and Forestry Policies, and aiming at defining objectives and guidelines for fishing national policies;

b) A Central Consultation Committee for Fishing and Fish Farming (*Commissione consultiva centrale per la pesca e l'acquacoltura*), presided by the Ministry of Agricultural and Forestry Policies, and having the task of expressing an official advice on draft decrees concerning the fishing industry.

3.2. Description of the bipartite SD in the sector

The Italian CB structure is articulated on a two-tier system: a first level industry-wide agreement (CCNL), and a decentralised one (regional, provincial or company). The former provides minimum standards concerning pay, working time, working conditions and equal opportunities for women and men. The latter provides for the implementation of the CCNL and is mainly addressed to variable pay and incentives. The first part of CCNLs is "normative", setting general rules in the field of personnel classification, contracts of employment and flexibility, working time and rest periods, and union rights, on the one side, and the procedures and contents of second level bargaining, on the other side. The second part is "economic" (wages). The normative part lasts four years, while the economic one only two years.

Article 39 of the Italian Constitution states that a collective agreement is automatically extended to all employees (*erga omnes*), whenever it is signed by representative bodies in which "registered" trade unions are represented in proportion to their numerical strength. The missing implementation of Article 39 makes it impossible the *erga omnes* extension, even if, actually, the courts often provide *erga omnes*, especially for pay issues.
Finally, there are no obligations to participate in CB, at any level.

a) At sector level
As pointed out previously, the sector is covered by three specific industry-wide agreement[144]: (1) the CCNL for sea fishing firms; (2) the CCNL for the land personnel of sea fishing and fish farming co-operatives; (3) the CCNL for sea fishing co-operatives that are affiliated to UNCI.

1) CCNL for sea fishing firms (13 June 2001)
This CCNL is supposed to cover about 15,000 workers. It was signed by Federpesca on the employers' side, and by the three main sector trade unions FLAI, FAI, and UILA, and then was renewed on 2005, March the 8th. As regards wages, the renewal agreement provided average increases of fixed pay of 2.6% since 2005, April the 1st, plus supplementary 2.6% since 2006, January the 1st. As for the normative part, it revised the jobs classification system by introducing the profile of "multifunctional mariner" (*marinaio di prima*), to be defined in the context of decentralised bargaining. It also indicated the necessity for Federpesca members to join the National Joint Fund for Continuing Vocational Training (Fondimpresa). Finally, it stipulated that social partners must make a joint effort in order to identify the ways of use of work/training contracts of employment, internships, and vocational training, as modified by the recent reform of the labour market (Decree 276/2003).

2) CCNL for the land personnel of sea fishing and fish farming co-operatives (5 February 2003)
This CCNL was signed by Federcoopesca, Lega Pesca, and AGCI Pesca on the employers' side, and by the three main sector trade unions FLAI, FAI, and UILA. In the introductory part, the signatory parties confirmed the intention to pursue the aim of homogenisation through the launch of a unique CCNL covering the fishing sector as a whole. On the other hand, they stipulated that this process will require further studies and negotiations, because of the specificity of working conditions in the field of activity of small fishing boats at the present time. The economic part of the CCNL was renewed on 2005, October the 26th. The renewal agreement provided average pay increases of about 61 euro, plus a supplementary one-off payment of an average of 150 euro paid in November 2005.

3) CCNL for sea fishing co-operatives that are affiliated to UNCI (14 September 2004)
This CCNL was signed by UNCI Pesca on the employers' side, and by the autonomous trade union FESICA-Confsal. As already noticed, the signatory organisations are not recognised by the dominant players at sector level; nevertheless, the lack of legislation on representativeness made it possible for them to sign a separate CCNL, whose coverage is being questioned by the main sector players at the moment.

There are no obstacles to the development of the bipartite SD at sector level. There is no form of promotion of sector SD by the Government in Italy.

b) At company level
There are no official data on decentralised bargaining (at regional, local or company level). There are no available data on company agreements (because there are no national archives collecting them), but a company level bargaining process does exist in the sector.

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[144] An important fourth CCNL, which applies to the personnel of industrial firms producing fishing nets is linked to the textile industry sector (see footnote 143). Actually, its coverage (about 1,300 companies and 8,000 workers) was recently extended to other service activities related to the fishing industry.

Comment

There are significant differences at sub-sector level; in particular, the activities of fresh-water fishing and related services are only of slight relevance. The fishing industry is highly fragmented. Indeed, companies are mostly individual and small firms. As a consequence, interest representation within the sector is also highly fragmented. On the employers' side, above all, there are five associations representing different segments of the sector. On the workers' side as well, structural fragmentation and informality in the definition of representativeness create spaces of action for autonomous trade unions which, in any case, play a marginal role in the sector. SD is a mirror image of this situation; in fact, there are three different industry-wide agreements regulating the sector. Nevertheless, the social partners are cooperating in order to reduce the number of CCNLs and therefore to harmonise all the main regulatory aspects, even though this process will probably take a long time.

LATVIA

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

The delimitation of the Fishing Industry sector of the Central Statistical Bureau of Latvia corresponds to the NACE classification, i.e. NACE 05, although sometimes it is not separated from agriculture – some indicators are specified only for NACE A and B. The Fishing Industry employers' and workers' organisations in Latvia work, in most cases, both with the Fishing Industry and with Processing and preserving of fish and fish products, i.e. NACE 05 and NACE 15.2. Some bargaining on the sector level takes place only in Processing and preserving of fish and fish products Industry, i.e. NACE 15.2.

1.2. Socio-economic features of the sector

As for the Fishing Industry, in 2004 its accumulated GDP was 8.3 million LVL at the actual prices, which is approximately 0.11% of the total GDP in Latvia. Although, in comparison with 2003, the GDP in Fishing Industry in 2004 increased by 9.8%, in comparison with 2000, the Fishing Industry share in the total GDP of Latvia has decreased almost three times – from 0.33% to 0.11%.[145]

In the first 9 months of 2005 Latvian companies exported fish production (canned fish excluded) to 38 countries. In comparison with the first 9 months of 2004 fish production exports increased by 22% and were 58.7 thousand tons.

The value of the exported production amounted to 21.5 million LVL. The main reason for the increase in the exports was higher fish catches both in the Baltic Sea and outside. Although in 2005 3rd quarter the fish production price increased by as much as 40%, in comparison with the first 9 months of 2004, the price of the exported production this year increased only by 4%.

Compared to the first 9 months of 2004 the proportion of fish production exports to the EU countries has dropped from 54% to only 30%. In the meantime, the proportion of exports to the Commonwealth of Independent States has increased from 29.3% to 33%. The increase has been enabled by the growth of exports to Ukraine and Belarus. The production prepared on ships fishing in the Mauritanian fishing area has mostly been exported to Mauritania (33.7% of the total fish production export) and France (18% of exports).[146]

According to Mr Normunds RIEKSTINS, the Director of the National Board of Fisheries, it is very hard to estimate the volume of the underground economy in the Fishing Industry. The believed amount of illegal catches and sales is 30-40% of all catches, although these numbers are not very well-grounded. The National Board of Fisheries of Latvia lately has been trying to improve this indicator, but any ship can still land its production in ports of other countries, where the control is not that strict.

As the Fishing Industry in Latvia is quite small, there are also no big companies. Most companies in the deep-sea fishing sector in Latvia are Small and Medium Enterprises, with a tendency to small enterprises. Most coastal fishing enterprises are either in a form of individual merchant or "fishermen farm". Almost all enterprises of the Latvian Fishing Industry are distributed along the Baltic Sea coastline. The biggest concentration of fishing enterprises is in Liepaja, Venstpils and Riga.

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Total of the sector	130	ND*	ND*	ND*	4	0

*The total number of companies with less then 50 employees in the sector is 126

Source: Central Statistical Bureau of Latvia, http://data.csb.lv (year 2003)

[145] Central Statistical Bureau of Latvia, http://data.csb.lv/

[146] The National Board of Fisheries, http://www.vzp.gov.lv/?sadala=9

Fresh-water fishing in the Latvian Fishing Industry constitutes an insignificant proportion – only 0.71% of all catches.[147] And, although the employment in the fisheries sector in the internal waters in 2004 was as high as 1601, it is only because of the great number of occasional fishermen. There are only 54 full-time employees, which represents only 3% of all full-time employees in the Fishing Industry.

Altogether the fisheries sector in Latvia in 2004 employed 1804 full-time, 617 part-time and 1694 occasional workers, which adds up to 4115 employees in total. It is a big decrease in comparison with the previous years, as during the time period 2000 – 2003 the total employment was in between 6000 and 6500 employees. Also the number of full-time employees has dropped from over 2100 to 1804.

Workers

Sub-sectors	Number of self-employed workers full-time in the sector	Number of Employees full-time in the sector	Number of employees full-time in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	ND*	1,804	ND*	ND*	ND*	ND*	0

* The Central Statistical Bureau of Latvia does not provide such data individually for the Fishing Industry

Source: Central Statistical Bureau of Latvia, http://data.csb.lv (year 2004); Eurostat, http://epp.eurostat.cec.eu.int (year 2004)

Most of the full-time workers are employed in the deep-sea fishing sector – altogether 1214 (67.3%), while 242 (13.4%) workers are employed in the coastal fishing. As mentioned before, only 54 (3%) employees work in the internal waters and 294 (16.3%) in the aquaculture sector. Traditionally for the Fishing Industry, it is mostly men who are employed. Only 107 women are full-time employees in this sector, which constitutes 5.9% of all full-time employees.[148] Nevertheless, women do receive higher a salary than men – the gross wage for women is 129 LVL per month, 61% of the average salary in Latvia. The gross wage for men in the Fishing Industry is 59% of the average salary in Latvia. As the low salaries would indicate, fishermen do not require high level of qualifications, and nor are there many opportunities to improve one's qualifications in this sector. But no quantitative data are collected on this issue.

Since 1995, companies in the Fishing Industry in Latvia have experienced a significant decrease in the total share capital, it has decreased more than 14 times from 27.8 million LVL to just 1.9 million LVL in 2004. After a short recovery in 1999-2000, the share capital dropped from 12.8 million LVL in 2000 to 3.9 million LVL in 2001, and has since been decreasing every year.[149]

Privatisation in the sector began in 1991, when a special law for this process was created. Many believed that this privatisation has brought more harm than good[150]. At the moment only fish hatcheries are still owned by the State, thus the sector essentially operates in a private market.

[147] Central Statistical Bureau of Latvia, http://data.csb.lv/

[148] Eurostat, http://epp.eurostat.cec.eu.int/portal/page?_pageid=0,1136206,0_45570467&_dad=portal&_schema=PORTAL

[149] Central Statistical Bureau of Latvia, http://data.csb.lv/

[150] Vjaters, Antons, „Vienas dienas darbs," Dienas Bizness, Riga: 17 Feb. 1995.

2. Description of the organisations active in the sector at national level

2.1. Description of the workers' organisations active in the sector

Latvian Fish and Food Industry Workers' Union (LFFIWU) / Latvijas Zivsaimnieku un pārtikas darbinieku arodbiedrība (LZPDA)[151]

LFFIWU is a free and independent, non-governmental, non-party, workers' organisation that, on a voluntary basis unites employees of private structures, companies and institutions in the spheres of activity of fishing, fish farming, processing of fish products, ship construction and maintenance, auxiliary sectors, pensioners of these spheres, as well as those unemployed in the sphere and those living in Latvian fishermen's villages. The aims of the LFFIWU activities are: to preserve fishing, fish farming, and fish processing spheres in Latvia; to ensure a normal legislative base for everything connected to fisheries, processing and sale of fish products; to allow all employees feel safe and protected in every enterprise; to participate in the development of legislation in Latvia together with its members. LFFIWU work is co-ordinated by LFFIWU Republican Committee that, when invited: gives consultations to employees in social, economic, legal matters, etc., employment legislation issues, and admits new members; helps to solve conflict situations between workers and employers; signs collective agreements; participates in the Fisheries Advisory Council of the Ministry of Agriculture; signs collective social partnership agreements with the National Board of Fisheries and the Union of Latvian Fish Processing Industry (ULFPI).[152]

The LFFIWU was registered with the Ministry of Justice of the Republic of Latvia on 26 April 1991. It has never been a very strong trade union, although until 2003 it did participate in CB in Fish Product Processing sphere in sector level with ULFPI, until the change of its president. The LFFIWU is financed by membership fees, which is 1% of a member's wage. The LFFIWU does not employ any salaried workers. The total number of members of LFFIWU is approximately 1,000, most of them from enterprises in the fish production processing sphere and almost all – blue collar workers. Only a small number of fishermen decide to join the trade union[153], and the union finds it hard to communicate with them. According to LFFIWU chairwoman Ms Maija SMILA, many fishermen sign a contract with a Latvian enterprise and then work on a foreign ship, where they are hard to reach in case of necessity. Most fishermen turn to LFFIWU only after an incident with employer.

LFFIWU partakes in the work of the Fisheries Advisory Council of the Ministry of Agriculture, so it is legally recognised on a national level – it is mentioned as a member of the Council in its Statute.

This Council has only recommendatory power and it does not consider SD as one of its competencies. No real tripartite concertation specific for this sector exists, and the Fishing Industry is also not represented in National Tripartite Cooperation Council. Occasionally, issues linked to SD arise in the Fisheries Advisory Council of the Ministry of Agriculture, but the debate is only a formality with one representative from LFFIWU and 10 representatives from employers' organisations; thus LFFIWU is not recognised in the main national institution dealing with the SD. As mentioned before, LFFIWU is not a strong trade union, thus it is extremely hard to negotiate at sector level, as employers' organisations are not interested in a dialogue. Until 2003, LFFIWU had a collective agreement with the ULFPI, which shows that a SD in fisheries sphere is possible. After the election of Mr Inarijs VOITS as the president of ULFPI the agreement has not been prolonged. According to Mr Inarijs VOITS, neither ULFPI nor Latvian Fisheries Association, which he also presides, is or in the nearest future will be interested in CB with the trade union. LFFIWU does take part in CB, they have a collective agreement and also a successful dialogue with the National Board of Fisheries that administrates Latvian Fish Resources Agency which administrates Fish Hatcheries "Dole", "Tome", "Sērene", "Brasla", "Pelči", "Kārļi" and "Ķegums". LFFIWU also has collective agreements with two fish processing companies – "Brīvais vilnis" and UNDA Ltd.

LFFIWU is a member of Free Trade Union Confederation of Latvia (LBAS). LFFIWU co-operates with Water Transport Trade Union Federation (ŪTAF) and both organisations together represent the Latvian water transport and fisheries sectors in International Transport Workers' Federation (ITF).

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151 The chairwoman of LFFIWU is Ms Maija SMILA, who was interviewed on 23 February 2006 in Riga.

152 LFFIWU Statute

153 The total membership of 1000 consists mainly of workers in fish processing.

Workers' organisation(s)

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Latvian Fish and Food Industry Workers' Union (LFFIWU)	1000*	10*	10 / 1804 = 0.5%	Yes***	-	ITF**

*An estimate by Ms Maija SMILA

**LFFIWU partakes in ITF as a member of Water Transport Trade Union Federation of Latvia, as otherwise its number of member would not be sufficient to become a member of ITF.

***No dialogue is taking place at the moment at sector level.

2.1. Description of the employers' organisations active in the sector[154]

The organisations mentioned further in this section are only potential SD partners in Fishing Industry, as no dialogue is taking place at the moment at sector level.

a) Latvian Fisheries Association (LFA) / Latvijas Zivsaimnieku asociācija (LZA)

The aims of the LFA are[155]: to unite legal entities working in the sphere of fisheries in order to achieve common goals and ensure the increase of LFA influence by involving new members. It aims to create and support on an everyday basis such development principles that provide fair competition and gives equal opportunities to all members of the LFA to represent the interests of the LFA and its members or protect these interests by law in governmental institutions, state, legal and municipal institutions, non-governmental organisations, and abroad. It aims to actively influence the development and ratification of laws and regulations and partake in dealing with fishing regulations and the protection of fish resources. Mr Inarijs VOITS explained that the LFA was founded on 3 April 1996 and has grown to be the biggest non-governmental organisation uniting enterprises in Fishing and Fish Processing Industries. The LFA has 54 legal entities as members, and it is financed by membership subscriptions. The LFA employs 3 full-time employees.

The LFA is recognised as the most important actor in the Fishing and Fish Processing industries by the National Board of Fisheries – this organisation has the most (3) representatives in the Fisheries Advisory Council of the Ministry of Agriculture. The LFA is mentioned as a member of the Council in its Statutes, thus it is recognised legally.

According to Mr Inarijs VOITS, this organisation is also the only one from the non-governmental sphere which is taken seriously by the EU and European Commission. This organisation has all the preconditions to become a partner in the SD, except that it has no desire to do so. Mr Inarijs VOITS pointed out that the LFA has not negotiated with any trade union until now, and it has no interest in negotiating in the future. The LFA mainly acts as a consultative body for its members. Discussions about different issues take place at Board meetings, which are open to all, but the issues rarely concern SD. Basically, the only place where the LFA meets the LFFIWU is the Fisheries Advisory Council, where discussions about social issues are very rare, as it is not the purpose of this council (out of 17 members, there is only one representative from LFFIWU). Thus the LFA has never signed any collective agreement concerning employees.

The LFA is not a member of any national organisation.

b) Latvian Fisheries Federation (LFF) / Latvijas Zvejnieku federācija (LZF)[156]

The LFF itself consists of 13 fishermen's unions in different areas, which represent both inland and coastal fishermen.[157] The LFF's main aim is to represent these fishermen in governmental and public institutions, non-governmental organisations and abroad[158]. LFF was founded on 23 September 1999, and it is not exclusively an employers' organisation, as among its 150 members

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[154] The president of LFA is Mr Inarijs VOITS, who was interviewed on 20 February 2006 in Riga.

The organisations mentioned further in this section are only potential SD partners in Fishing Industry, as no dialogue is taking place at the moment at sector level.

[155] Lursoft, http://www.lursoft.lv/appserver3?Form=URpCI&code=YHCGEYHYYDBVHXPCNVHMNVPNHECYQD

[156] The chairperson of LFF is Mr Evalds URTANS.

[157] Latvian Fisheries Yearbook 2005, year No 9, p. 292

[158] Lursoft, http://www.lursoft.lv/appserver3?Form=URpCI&code=KFJMTLNDOIXNLKTBFIXMDFRHBUUDYU

there are also individuals. LFF does not have any employees, and is financed by membership subscriptions and fundraising for projects. According to Mr Evalds URTANS, the LFF has done significantly more in the last three years than during the whole of its previous existence, and has also represented its interests at parliamentary level.
Just like the LFA, the LFF does not take part in the SD with employees, as this is not its purpose. It does take part in the Fisheries Advisory Council with one representative, thus sometimes it is involved in discussing issues linked to SD. But as an employers' organisation, the LFF has a potential to get involved in the SD. The LFF is mentioned in the statutes of the Council, thus it is legally recognised.
The LFF is an associated member of LOSP.

c) Fishermen's Association of Kurzeme Region (FAKR) / Kurzemes Zvejnieku asociācija (KZA)[159]
The FAKR was established on 18 June 2003 to represent and protect the rights of the sea fishermen of Ventspils and Liepaja. It has stated an aim – to stimulate the development of fishing and fishery spheres of activity connected to it in Latvia and Kurzeme, as well as to improve the living and working conditions of fishermen. The creation of the FAKR was a rational decision, as 80% of all sea-fishing fleet of Latvia is based in Liepaja, but the biggest fishery association LFA was based in Riga. At the moment the FAKR consists of 14 SMEs in the fishing sector, and is financed by membership subscriptions. Its staff consists of three employees.
Just like the LFA and the LFF, the FAKR does not take part in the SD with employees, as this is not its purpose. It does take part in the Fisheries Advisory Council with one representative, thus sometimes is involved in discussing issues linked to SD. But as employers' organisation, FAKR has a potential to get involved in the SD. It is mentioned in the Statutes of the Council as one of its members, thus it is recognised legally.
The FAKR is a member of Latvian Fisheries Association and Latvian Fishing Production Processing Group.

Employers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
Latvian Fisheries Association (LFA)	54	1,000*	ND**	No	-	BSRAC***
Latvian Fisheries Federation (LFF)	ND****	ND****	ND****	No	-	-
Fishermen's Association of Kurzeme Region (FAKR)	14	300	14 / 130 = 10,8%	No	-	-

*Estimation by Mr Inarijs VOITS
**Cannot be calculated, as companies from other sectors (i.e. Fish Processing) are affiliated to this organisation as well
***The General Assembly to establish the Council is due on 15 March 2006
***No such information is available, as LFF unites both companies and individuals

[159] The chairperson of FAKR is Mr Igors MARKUSEVSKIS.

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

No real tripartite concertation specific for this sector exists, and the Fishing Industry is also not represented in National Tripartite Cooperation Council. Occasionally, issues linked to SD arise in the Fisheries Advisory Council of the Ministry of Agriculture, but the debate is only a formality with one representative from LFFIWU and 10 representatives from employers' organisations. However, if we consider the following definition of the tripartite social concertation, 'a process in which the state involves workers' and employers' organisations in the policy debate and possibly in decision-making'[160], such a concertation exists in the form of the Fisheries Advisory Council of the Ministry of Agriculture, where both employers' and workers' organisations, as well as governmental institutions are involved. Although meetings of the Council take place on a regular basis, only on rare occasions are issues about workers' and employers' relations discussed.

Seven employers' organisations are represented in the Council: the 3 employers' organisations presented above and which are organisations of the Latvian Fishing Industry; Union of Latvian Fish Processing Industry (ULFPI); Latvian Crayfish and Fish Farmers Association (LCFFA); The society "Rīgas Šprotes"; National Fishery Producers Organisation (NFPO). Workers are represented by LFFIWU, although there is only one representative for all workers in Fishing and Fish Production Processing industries.

There are no signed agreements, as the Council decisions are only recommendatory. But all decisions are considered by the National Board of Fisheries, the Ministry of Agriculture, and other interested parties. Since 11 December 2003 there has been only one decision about social policies and that was a decision to support the initiative of the Cabinet of Ministers to change the 25 June 2002 regulation No. 272 and to include fishing in the Baltic Sea on the list of seasonal work. This was beneficial to the employers.

The Council has a potential to develop a tripartite social concertation, but that is only possible if both workers' and employers' organisations are interested in it. According to Mr Normunds RIEKSTINS, the director of the National Board of Fisheries, the Board is not going to form agendas, but the Council is a place where the participating organisations can raise issues of their concern, which might as well include social issues.

3.2. Description of the bipartite SD in the sector

The chairperson of LFFIWU, Ms Maija SMILA, admitted that, unfortunately, the trade union is not very strong, and no bipartite SD is taking place, because the employers' organisations are not interested and LFFIWU does not have effective tools to change this. Mr Inarijs VOITS agreed that the biggest NGO in the Fishing Industry, the LFA, is not interested in any SD with the trade union. Thus no collective agreements in the sector level are signed[161], and the situation is not likely to improve in the near future. There are several obstacles to the development of a successful bipartite SD. According to Ms Maija SMILA, one of the problems is that fishermen sign their contracts with their employer in Latvia, but actually work on foreign ships, where it is extremely hard for LFFIWU to help them. Another problem is the decrease in the Fishing Industry, which leaves many fishermen looking for work. Fishermen are also not very eager to join the trade union (only a small number of members of the trade union are fishermen). Most of the members are from fish processing and other spheres. These two reasons make collective workers' actions in the Fishing Industry almost impossible, thus disabling the most effective tool of trade unions.

Comment

The SD in the Fishing Industry in Latvia is seriously underdeveloped. Fishing in Latvia is a small industry and thus is not represented in the National Tripartite Cooperation Council, and the fishermen are also not willing to join the trade union. Thus the LFFIWU is not able to take any collective and preventive action against employees, and mainly have to deal with the consequences of ill-prepared contracts that fishermen sign. Although employers' organisations meet the LFFIWU often in the Fisheries Advisory Council, they have no interest in negotiating social issues. There might be three possible solutions to this problem. The first of these might be the election of more pro-worker chair-people in the employers' organisation, which seems unlikely, as employers have their economic interests. The second option might be a stronger trade union. If the necessity and positive aspects of joining the trade union were promoted among fishermen, more fishermen might join the trade union and thus employees would have to respect it. And the third solution might be to define LFFIWU relations with employers by law, i.e. by

[160] Industrial relations in Europe, European Commission (Directorate-General for Employment and Social Affairs), May 2002, p 92.
[161] Although LFFIWU does have 4 collective agreements, none of those are in the Fishing Industry.

mandatory participation of a representative of the trade union in companies' board meetings. All in all, there is a lot of room for improvement in the tripartite and bipartite SD in the Fishing Industry in Latvia.

Annex: List of organisations

- Valsts zivsaimniecības pārvalde (VZP) / National Board of Fisheries (NBF)
- Zemkopības ministrijas Zivsaimniecības konsultatīvā padome / Fisheries Advisory Council of the Ministry of Agriculture
- Valsts aģentūra "Latvijas Zivju resursu aģentūra" (LZRA) / Latvian Fish Resources Agency (LATFRA)
- Latvijas Zivsaimnieku asociācija (LZA) / Latvian Fisheries Association (LFA)
- Latvijas Zvejnieku federācija (LZF) / Latvian Fisheries Federation (LFF)
- Latvijas Zivrūpnieku savienība (LZS) / Union of Latvian Fish Processing Industry (ULFPI)
- Latvijas Vēžu un zivju audzētāju asociācija (LVZAA) / Latvian Crayfish and Fish Farmers Association (LCFFA)
- Kurzemes Zvejnieku asociācija (KZA) / Fishermen's Association of Kurzeme Region (FAKR)
- Biedrība "Rīgas Šprotes" / The society "Rīgas Šprotes"
- Nacionālās zvejniecības ražotāju organizācijas (NZRO) / National Fishery Producers Organisation (NFPO)
- Latvijas Zivsaimniecības un pārtikas ražotāju arodbiedrība (LZPDA) / Latvian Fish and Food Industry Workers' Union (LFFIWU)
- Baltijas Jūras Reģiona konsultatīvā padome (BJRKP) / Baltic Sea Region Advisory Council (BSRAC)
- SIA UNDA / UNDA Ltd.
- A/S „Brīvais Vilnis" / „Brīvais Vilnis", corporation
- Latvijas Brīvo arodbiedrību savienība (LBAS) / Free Trade Union Confederation of Latvia
- Latvijas Ūdens transporta arodbiedrību federācija (ŪTAF) / Water Transport Trade Union Federation
- Lauksaimnieku organizāciju sadarbības padome (LOSP) / Association of Latvian Organic Agriculture Organisations (ALOAO)
- Latvijas Zvejas produktu ražotāju grupa (LZPRG) / Latvian Fishing Production Processing Group (LFPPG)

LITHUANIA

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

Fishing activities take place in lagoons and in the Baltic Sea, and there are several enterprises engaged in this industry. There are several business associations for these companies; they appear to be organised along geographical lines and contain enterprises engaged in fishing in the lagoons and sea of Lithuania. Hence their membership lies entirely within NACE 05.01. The business associations are not members of European organisations. However, there are no unions in this sector and thus no SD.

Statistics Lithuania follows the definitions given by NACE and so there are no deviations from NACE 05 in the statistics. Published statistics tend to follow the alphabetic NACE classification, labelling fishing as NACE B, and are not broken down below this level.

1.2. Socio-economic features of the sector

Fishing accounted for 0.1% of Lithuanian GDP in 2003.[162]

According to official data there were 206 employees in personal enterprises, 1,065 employees in other enterprises and 19 self-employed people working in the sector in 2002.[163] However the United Nations Food and Agricultural Organisation (FAO) estimated the number of sea fisherman at 2,500 and employment in internal fisheries at 1,500.[164] Hence, sector employment appears to be in very uncertain with a range from 1,300 – 4,000. As a proportion of total employment this is from 0.1% to 0.3%. Estimates of the size of the shadow economy in this sector are not available, but the uncertainty over employment and the nature of the industry seem to both suggest that unreported income may be relatively high. Unfortunately, there are no data on categories of workers of the sector, qualifications level, wages, atypical work and gender repartition.

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	19	1,290	1,290/1,405,900=0.1%	388/1,290=30%	570-683/1,290=44%-53%*	200-332/1,290=16%-26%*	0

Source: Statistics Lithuania (2004). *Main Indicators of Small, Medium and Large Enterprises 2002* (Vilnius). *Range due to lack of data for part of this size category resulting from protection of confidentiality.

The official data report 136 personal enterprises and 80 other enterprises. However, the FAO puts the number of companies at over 280, including 42 deep water enterprises, over 100 along the coast, over 75 in the Curonian lagoon and 67 in other waters. Official data reports no companies with more than 250 employees. There are only 2 firms that employ 100-249 workers and, unfortunately, data confidentiality prevents us from obtaining information on the number of people working for these firms. At the other end of the scale, however, official data reveal that almost exactly half of the *personal* enterprises have no employees, and employment in all enterprises with fewer than 10 employees makes up 30 percent of total employment. This results in a situation, as shown below, where almost a third of all companies are without employees, and another half of the companies have from 1 to 10 employees. However, these firms only produce 26

[162] Statistics Lithuania (2004). *Statistical Yearbook of Lithuania 2004* (Vilnius), CD-ROM.
[163] Statistics Lithuania (2004). *Main Indicators of Small, Medium and Large Enterprises 2002* (Vilnius).
[164] United Nations Food and Agricultural Organisation (2005). "Lithuania – Fishery Sector", FAO Country Profiles, May. Available at: http://www.fao.org/fi/fcp/en/LTU/profile.htm.

percent of the value added in the industry. Since most fishing takes place off the coast of Lithuania, which is relatively short compared with the total area of the country, the fishing industry is relatively concentrated in just one, Klaipeda, of the 10 counties of Lithuania. Companies with fewer than 10 employees report net losses on aggregate. Labour costs for the industry as a whole are a small proportion of total costs, only around 5 percent. The sector is completely private.

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Total of the sector	216	31	54	14	1	0

Source: Statistics Lithuania (2004). *Main Indicators of Small, Medium and Large Enterprises 2002* (Vilnius).

The Lithuanian fishing industry grew fast from 1995-2003, with an increase in nominal value added at factor cost of 16 percent per year on average. This compares with the overall average growth of Lithuanian nominal value added at factor cost of only 10 percent per year in this period. From 2000 – 2003 the increase in nominal value added at factor cost was 66 percent, compared to total national increase of 24 percent. From 2000 – 2003 there has been a 30 percent increase in the number of enterprises.[165] From 2000 – 2003 employment in the fishing industry fell by 2 percent while total Lithuanian employment rose by 3 percent. This data suggests an impressive increase in the productivity of both firms and labour in the first three years of the 21st century in the Lithuanian fishing industry. It also suggests a reduction in the average size of enterprises both in terms of value added and employment. Recently directives from the EC imply extra administrative burdens on fishing enterprises.[166] This seems likely to push the industry towards consolidation with firms merging into just a few larger enterprises. In the future, companies are expected to grow in size as a result of mergers.

2. Description of the organisations active in the sector at national level

2.1. Description of the workers' organisations active in the sector

There are no workers' organisations in the fishing industry, even at the enterprise level. This is despite the fact that the largest companies have over 100 employees.

2.2. Description of the employers' organisations active in the sector

There are three significant employers' organisations in the Lithuanian fishing sector. Hence this report will describe each of them in turn. Note that there is no recognition of them as representing the fishing industry. In fact, they have a legal registration as business entities, but there is no legal or other recognition of them as social partners.

a) Fishing Business Association (no official English name) / Zvejybos verslos asociacija

The Association was founded in 1994. It is established as a non-profit organisation. It has no funding, its activities are carried out on a voluntary basis by the Chair. A sub-sector covered by the organisation is fishing in the Curonian Lagoon. Only one person works for the organisation but this is only part time and is unpaid. The members are personal enterprises.
The Fishing Business Association is entirely independent and not affiliated to any higher level organisations at the national or international level.

[165] Own calculations from Statistics Lithuania (2004). *Financial Indicators of Enterprises I-IV Quarter 2003* (Vilnius), p. 11 and Statistics Lithuania (2001). *Financial Indicators of Enterprises I-IV Quarters 2000* (Vilnius), p. 11.
[166] Personal interview with Gintautas Morkevicius, Chair of Fishing Business Association,

b) Fishermen and Fish Processors' Association "The Baltic Fisher" (no official English name) / Zveju ir zuvies perdirbeju asociacija„baltijos žvejas"

The Baltic Fisher unites the few larger fishing companies in Lithuania. Hence, although it has only 7 members, it covers approximately 40 percent of the Lithuanian fishing fleet. 3 people work for the Association. Members are larger companies, each with a few boats.

Even if this is not possible to negotiate in the Lithuanian fishing industry due to the complete lack of unions, the Association also lies outside the scope of interests of the Baltic Fisher, as the Association has been formed to represent its member firms in negotiations with the Government.

The Baltic Fisher is entirely independent and not affiliated to any higher level organisations at the national level.

c) Association of Fishing Companies "Lampetra" (no official English name) / Zuvininkystes imoniu asociacija„Lampetra".

The Association was founded in 1993. It has not joined any European level associations as it finds them too expensive. However, it participates in international projects including within the Kaliningrad oblast. Members pay a fee and there is a 4% fee for environmental services collected through the Ministry of Environment. All sub-sectors are covered by the organisation. Three people work for the Association. The members are mainly small companies operating in inland fishing, sea fishing, and one fish product manufacturer.

The Fishing Business Association is entirely independent and not affiliated to any higher level organisations at the national or international level.

Employers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
Fishing Business Association	12	30-40	2%	No	-	-
Association of Fishing Companies "Lampetra"	62	ND	ND	No	-	-
Fishermen and Fish Processors' Association "The Baltic Fisher"	5-7	ND	ND	No	-	-

Source: personal interviews conducted with Gintautas Morkevicius, Chair of the Fishing Business Association; Algirdas Ausras, Chair of Baltic Fisher, and Virginijus Domarkus, President of Lampetra, in the period 24th February – 1st March 2006.

3. Description of the SD in the sector at national level

There are no unions in the Lithuanian fishing industry, even in the large enterprises with more than 100 employees. Hence, no SD takes place within this sector.

Comment

The Lithuanian fishing industry is very unorganised, with no unions despite the fact that there are two companies with more than 100 employees. Hence, there is no SD in this sector. In that respect it is similar to the shipbuilding industry, also centred around the port city of Klaipeda. It is unorganised on the enterprise side, in the sense that there are several associations representing fishing enterprises. None of these associations has any affiliation either to the national confederations of enterprises or international associations representing the fishing sector.

The sector has experienced strong growth in value added over the last few years, becoming a larger portion of Lithuanian GDP, although starting from a small base. Radical restructuring is predicted in the coming years, due to EU directives forcing firms to take on more administrative responsibilities.

LUXEMBOURG

The fishery sector is not relevant to Luxembourg. In fact, the 2004 statistical directory[167], edited by STATEC[168] mentions no companies under code NACE 05. There is no SD and no collective agreement in this sector.

[167] Les entreprises luxembourgeoises, répertoire systématique, STATEC, Luxembourg, décembre 2004.
[168] Service central de la statistique et des études économiques.

MALTA

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

The fishing sector in Malta operates within the activities of NACE 05 related to fishing, trawling in seawater and other seawater fishing. Thus, the delimitation corresponds to the NACE classification.

1.2. Socio-economic features of the sector

Apart from the main Maltese Legal Act (Act II of 2001, Chapter 425) dealing with the conservation and management of fisheries, a number of subsidiary regulations have been drawn up, including one on the registration and operations of fishing vessels (L.N. 407 of 2004). The fishing fleet register was closed on 15 September 2003 through a notice in the Government Gazette (10 September 2003) in order to prevent any increase in fishing capacity and effort, in line with the management policy reflected in EC 813/2004.

Malta's fishing fleet consists of about 2,250 vessels classified as; MFA (commercial)-430 vessels, MFB (semi-commercial) - 995 vessels, MFC (recreational fisherman) – 825 vessels.[169] Another classification of boats is MFD (boats which can not be used for fishing). Over 90% are less than 12 meters and engage exclusively in coastal fisheries. The average age of Maltese vessels is 20 years. The total fish landings for 2005 amounted to 1,336,881 kilograms, an increase of 25.2 per cent, when compared to 1,067,822 kilograms of fresh fish, which were landed in the year 2004. The two major species which were responsible for this increase were blue fin tuna landings, which increased by 32.3 per cent and sword fish landings which recorded an increase of 85.4 per cent. The wholesale value of fish landings increased from Lm 1,826,101 in 2004 to Lm 2,477,854 in 2005, an increase of Lm 651,753 or 35.7 per cent.

For an island, Malta has a very small fishing industry. For the year 2004, the total fish contribution to GDP amounted to Lm 4.3 million, (approximately 10 million Euros[170]), i.e. 0.28% of GDP. During the third quarter of 2005, the fishing sector registered a rise in value added from Lm1.1 million to Lm1.2 million. The sector's contribution to the overall economy amounted to 0.3 per cent in the period under consideration. An increase in both the value of fresh fish landed at the fish market and the value of exported fresh fish was registered during the period under review.[171]

Foreign trade balance in fisheries products is negative at € 11 million. Exports amount to 2,300 tones and concern mostly fresh, chilled and frozen fish (farmed and caught in equal amounts). The local market relies on imports to supplement local production as consumption of fish products per capita is high (at 31.3kg annually, it is the second highest consumption rate in the enlarged Union) and Maltese processing facilities are very limited. Up to 17,400 tones of both fresh fisheries products and processed goods are imported.[172] It is assumed that at least 25% of all catches are not recorded for various reasons, which are beyond the control of the Fisheries Department. Changes in the fishing regulation system like the obligation of minimum catches sold to the Wholesale Fish market and the future surveillance of fisheries activities by maritime patrols should improve accuracy in the near future.

While it makes only a limited contribution to the national economy, fishing is however socially significant. Small-scale, traditional fisheries make an important contribution to the supply of fresh fish to the tourist industry, one of the main sectors of Malta's economy. The importance of the underground economy cannot be quantified. Anecdotal evidence suggests that there are some owners of small craft who sell part of their catch to the hotel and restaurant owners. However, these catches do not tend to be large fish, such as tuna or swordfish, which require heavy equipment to catch.

Total employment for September 2005 amounted to 427 full-timers and 193 part-timers of which 69 worked part-time as a primary job and 124 worked part-time whilst holding a full-time job. The composition of full timers in the sector was of 412 males and 15 females. Part time work in this sector is important because in offshore fishing entailing trips of more than two days, extra hands are sometimes recruited.

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[169] Koperattiva Nazzjonali tas-Sajd- Mr Raymond Bugeja, Secretary

[170] NSO News Release 267/2005

[171] NSO 267/2005

[172] www.europa.eu.int/comm/fisheries/enlargement/info_malta_en.pdf

Table 1: Part Time Workers for 2005

	Males	Females	Total
Part Time workers holding full time job	122	2	124
Part Time workers as primary Job	55	14	69

Source: NSO 16/2006 p.10.

All fishermen are self-employed. There are 11 importers/exporters of fish. These are mainly micro companies employing less than 10 employees. According to the Ministry of Rural Affairs and the Environment, there are 14 wholesalers at the Fish market. Unfortunately, data on characteristics of the employment in the sector in terms of categories of workers, qualifications level, and wages are not available.

Table 2: Companies

Sub-sectors	Number of companies	% companies without employees	% companies <10 employees	% companies 10-49 employees	%companies 50-249 employees	%companies with >249
wholesalers	c.a. 14*	ND	100	ND	ND	ND
Import/exporters	c. a. 11*	ND	100	ND	ND	ND
Total	c.a. 25	ND	100	ND	ND	ND

Source: Ministry of Rural Affairs and the Environment, 01/02/2006

* These mainly are micro companies employing less than 10 employees.

Table 3: Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/total number of employees in the country-all sectors-(%)	Number of employees in companies<10 workers in the sector/number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/number of employees in the sector (%)	Number of employees in companies 249 workers in the sector/number of employees in the sector (%)
Total	492*	128*	(128 /138,958)= 0.09*	ND	ND	ND	ND

Source: NSO, February 2006

*NSO statistics provide figures for employment in 'Fishing, Fish farming and Related Services'. It does not distinguish between self employed and employees. The figure of 492 self employed is based on the assumption that the members comprising the two cooperatives (see below) which is 492 are the self employed (full time or part time) fishermen. Presumably, most of the other 128 (602-492) are the employees, most of whom are part time workers. Thus the number 128 is based on an assumption but it is very approximate.

The qualitative data (interviews) and the scant available quantitative data indicate that the industry is in decline. The young generation tends to be reluctant to join this sector. No significant evolutionary change can be discerned. As the last fisheries census was undertaken in 1996 there is no other data for comparison purposes. Indeed a need to hold another census is being felt.

2. Description of the organisations active in the sector at national level

2.1. Description of the worker's organisations active in the sector.

No CB is undertaken in the sector and there is no union representation at company, sector or national level. There are two fishery cooperatives in Malta and all professional fishermen are affiliated to one or the other. Any dialogue that takes place is held between the Ministry for Rural Affairs and the Environment and these two cooperatives.

a) Cooperative Society of Fishing Ltd (Ghaqda Koperattiva tas-Sajd Ltd)[173]

This cooperative was established in 1964 with the intention of providing a "utility for the user". The Fishermen, mainly from Marsaxlokk, got organised and, in 1964 established a cooperative under the name of Ghaqda Kooperattiva tas-sajd. They became the main producer of the daily fresh fish supplying the local consumer healthy food. Over time, the number of cooperative members increased and its products were also proposed on the export market, so that they now supply Japan, Korea, Spain and Italy amongst others. It was the first cooperative founded to cater for the interests of the fishing sector and to promote fishermen's rights. The cooperative is not involved in any sub-sector but is very active in the export market. It has invested heavily in terms of highly advanced technology equipment to cater for this service. An official of the Cooperative Board commented that during a visit to the premises of the organisation he was impressed by professional approach of the manager and the technology being used to export fish[174]. The co-operative offers various services for all professional fishermen and also to part-time fishermen. Such services are Fish purchasing/Sales, Supply of Flake Ice, Fishing Tackle, Fishing Accessories, Cold Storage, Insurance Coverage and the availability of an area for packing and processing of fish. The cooperative has 160 members. 68 members are classified as MFAs (commercial) and 92 MFBs (semi-commercial). The funding of the cooperative is mainly obtained through the selling of fish at the fish market on which a "marketing contribution" is given which enables the cooperative to provide such services as bait supplies, cold storage facilities, procurement of fishing tackle, fish export service and other minor needs. The 160 members of the cooperative are usually the main employees. They are the ones that attend for fishing activities. There are two employees working for the organisation as staff while the administrative committee, composed of nine people, handles the collective running of the cooperative.

The organisation is legally recognised by a statute which is in line with the provisions laid down in the cooperative Societies Act 2002, administered by the Board of Cooperatives and legally approved by the Minister concerned.

The Cooperative's main concern is with EU regulations which it claims are shackling the local fisherman.

b) National Fishery Cooperative Ltd (Koperattiva Nazzjonali tas-Sajd Ltd)

This cooperative was founded in 1990. It is an organisation which spit off from the older one set up in 1964 (see above) with the initiative of a Social Action Movement led by a diocesan priest. The split was mainly due to divergent political allegiance of members. In the highly polarised political scenario prevailing in Malta, such splits related to political affiliations are quite common in various organisations. There are a full time manager and two clerical workers who take care of the day to-today business of the cooperative. At present, it has 332 members.[175] Funding is mainly from the sales of fish caught by its members. There is no data on the type of workers which are affiliated to this organisation. The members between them have a fleet of 2,250 boats (MFAs 430, MFBs 995 and MFCs 825). It caters for the management of selling, importing and exporting of fish. It oversees the purchase of vessels and any other tools and machinery that can be used in the best interest of its members. A person to be eligible as a co-operative member must be registered with the Employment and Training Corporation (ETC) as having fishing as a full-time job. He/she must own a boat, and declared crew members. The cooperative is having difficulties to operate in an efficient way due to bureaucracy which is hindering the take up of the EU funds and also the pre-accession funds.

The organisation is legally recognised by a statute, which is in line with the provisions laid down in the Cooperative Societies Act (2002) administered by the Board of Cooperatives and legally approved by the Minister concerned.

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173 www.maltafisheries.gov.mt

174 Interview with Vincent Fabri, official of Board of Cooperatives (21st April 2006).

175 This is the figure given by an official of the Board of Cooperatives (Interview on 28/2/06 and confirmed on 27/3/06). During the interview the officials of the cooperative claimed a higher figure (435).

At national level, they are both affiliated to APEX[176], an organisation representing the cooperative movement in Malta.

Workers' Organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
National Cooperative of Fishing Ltd	332*	332	332/620 =53.5%	No	-	-
Cooperative Society of Fishing Ltd	160*	160	160/620 = 25.8%	No	-	-

*As per figures provided by the Board o Cooperatives (Malta) on 28/2/06 and confirmed on 27/3/06. 620 fishermen are registered in the country (NSO Figures for September 2005 (NSO 16/2006): 427 full time (most of these are fishermen); 69 part time (part time being their primary job. Most of these must be fishermen); 124 part time (part timers holding a full time job. Very few must be fishermen. These are likely to be employees. This means that besides the 492 registered members of the Fishermen's Cooperatives (332+160), there are another 128 persons, most of whom must be part time workers holding another full time job, in the fishing industry.

2.2. Description of the employers' organisations active in the sector

There are no employers' organisations active in the Fishing Industry.

3. Description of the SD in the sector at national level

Since all the fishermen in Malta are self-employed, they cannot form a trade union in accordance with the provisions of the Employment and Industrial Relations Act (EIRA 2002). There is, thus, no CB in this sector.

3.1. Description of the tripartite concertation in the sector

There is no tripartite social concertation specifically for the sector of Fishing Industry.

3.2. Description of the bipartite SD in the sector

No CB is undertaken in the sector, neither at sector level nor at company level. Meetings are held on a fairly regular basis between the Cooperatives and the Ministry of Fisheries and Agriculture.

Comment

The vulnerability of the fishing industry in Malta can be gauged by its low productivity. The average value of annual catches per employee is slightly over LM 800 (€ 2 000), merely one-fifth of the EU average. This reflects the predominantly non-industrial, part-time nature of fishing activities in Malta, based on artisanal methods. In particular, purse seiners and industrial longliners are not used by the Maltese fishing industry, also reflecting a conservation policy. Maltese fishing activity is predominantly carried out in waters that are in close proximity to the Islands, corresponding

[176] Apex Organisation is an organisation whose mission is the development of all the co-operatives in Malta and Gozo. It therefore functions as a Federation for the Co-operative Movement. According to the Co-operatives Act XXX of 2001, the Apex Organisation has to provide, organise and supervise effective centralised services for the Co-operative Movement, including co-operative education and training, and such other services as may be necessary or expedient for its members. The Maltese Co-operative Movement today boasts 58 registered co-operatives. These embrace around 5,000 members and report an estimated annual turnover of around Lm25 million per year (source: http://www.education.gov.mt/employment/coops/apex_org.htm).

to a 25 nautical miles radius zone and beyond by the small number of larger vessels.[177] The small size and lack of resources of the Maltese economy have resulted in under investment in a number of sectors, of which the fishing industry is a prime example. Moreover, the small size of the industry has been an obstacle to the accumulation of significant amounts of capital for investment in technology, which could generate economies of scale.

The sector, although small in size is of a peculiar nature. The two cooperatives seem to be in competition with each other. Their views as regards membership of the European Union diverge. The cause of this divergence seems to be that of political affiliations. Whilst the Koperattiva Nazzjonali tas-Sajd Ltd focuses on the macro side of the sector the Ghaqda Koperattiva tas-Sajd Ltd is more concerned with the micro economic view. There are contrasting views as to implications of adopting EU directives. Koperattiva Nazzjonali tas-Sajd Ltd is in the process of entering into the fish farming industry as an alternative source of income generation.

[177] An analysis of the impact of purse-seining and industrial longlining activity within Malta's 25 Conservation Zone-27 February 2002.

The Netherlands

1. Description of the sector's characteristics at national level

1.1 Delimitation and scope of activities in the sector

In the Standaard Bedrijfsindeling 1993 (SBI, the Dutch equivalent of the NACE classification system) of the Centraal Bureau voor de Statistiek (Central Statistics Office – CBS), the following activities are classified as part of the fishing industry: fishing (SBI 0501), sub-divided into: offshore fishing and coastal fishing (SBI 0501.1) and inland fishery (SBI 0501.2); and fish farming (SBI 0502). This delimitation corresponds to the NACE classification. Note that the landings of fishery products in the ports are not classified within the SBI system. The wholesale trade in fish is covered by SBI 5138.2: Wholesale in fish, crustaceans and molluscs.

The social partners in the fishery industry use the same delimitation. The employers' organisation in the trawler sector, the RVZ, wishes to stress that the interests of the "share-fishermen" should be adequately taken into account in the European SD given their large numbers and to their present position. Although there is no power relationship, seen from the point of view of industrial law between them and the ship owner, in reality the share-fishermen are to a large extent, dependent on the latter.

The so-called Commodity Board of the Fishery Sector (*Productschap Vis)*, an important public body in the sector with a bipartite board, divides the sector into the following sub-sectors: deep-sea fishing: fishing with freezer trawlers; cutter fishery: coastal fishery and offshore fishery; shellfish production: mussel production, oyster culture, cockle fishery and other shellfish fishery; inland fishery: fishery on Lake Ijsel (Ijselmeer) and other inland waters; Fish farms. From the point of view of CB, only a part of the Dutch fishery industry is relevant, for a large part of the Dutch fishery fleet, namely the cutter fleet, is crewed by self-employed workers, the so-called "share fishermen", who are not, therefore, covered by any collective agreement. This concerns about 1,500 workers. Another 500 workers work for small-scale companies in inland fishery and shellfish production, and are not covered by a collective agreement either. Finally, about 450 workers work in the trawl fishery sector, that is when only the workers that work under the Dutch flag are counted in (Source: RVZ). These workers are covered by the Collective Agreement for the Trawl Fishery. The landings of fishery products (auctions) concern a small sector, with between 250 and 300 workers. This sector does not have a sector level collective agreement. One of the landing companies has a company level collective agreement.

1.2 Socio-economic features of the sector

The fishery sector in the Netherlands has been a stable 0, 1% of GDP between 2001 and 2003 (CBS, 2005). Production is regulated by the European quota. In the deep-sea fishery sector, there are 12 trawlers which are operative (Source: RVZ). The cutter- and shellfish fleet together include around 500 vessels, of which about 400 are cutters. In inland fishery, there are 340 barges operating, of which 70 at the *IJselmeer* (the only large lake in the Netherlands). The Netherlands has 11 sea fish auctions, which have been or are in a process of merging, a mussel auction in the southern coastal province Zeeland, a shrimp auction in the Northern Province Groningen and a few freshwater auctions, including an IJselmeer auction. The supply value at the Dutch fish auctions in 2003 amounted to 0.35 billion euro. The supply value of mussels in 2003 amounted to 72 million euro. Fish imported in 2003 amounted to around 1.2 billion euro. Fish exports added up to about 2 billion euro. 80% of exports go to European countries. (Source: Commodity Board of the Fishery Sector (Productschap Vis, 2005). The share of the underground economy in the fishery sector is negligible to nil.

Up until recently, in the deep-sea fishery sector and in the trawler sector, there were four holding companies which were active, of which two now have merged, that is Vrolijk Holding in IJmuiden and Jacson in Scheveningen. The cutter sector consists of about 400 cutters which all operate as small companies. Usually, the ship-owners owns one cutter, although, sometimes a few cutters may be owned by a few members of the same family (brothers). Also in the inland fishery, most companies are small family concerns, usually without employees. They often operate on a part-time basis alongside other activities, e.g. tourism. In the shellfish sector, companies are a bit larger, but they are still small companies, with 30 to 40 employees at the most. There are 11 sea fish auctions which are in a process of merging. The companies are located along the North Sea coast from the very north of the Isle of Texel to the very south of the province of Zeeland. A second large concentration of fishery companies is to be found in the traditional fishing village of Urk, alongside the Lake IJssel, which was a sea before a dike closed it and turned it into a lake.

Table 1: Companies (1 January 2005)

Sub-sectors	Number of companies*	% companies without employees*	% companies with < 10 employees	% companies 10-49 employees	% companies 50-100 employees	% companies with > 100 employees
Offshore and Coastal Fishing (SBI 0501.1)	450	44.44	48.88	5.56	1.11	0
Inland Fishing (SBI 0501.2)	95	63.16	36.84	0	0	0
Fish Farming (SBI 0502)	180	41.67	55.56	2.78	0	0

Source: CBS, Statline, 2006.

* The number of companies in CBS statistics is often considerably higher than the estimations of this number by representatives of employers' and employees' organisations in the sector, most notably the category of companies without employees. This is also the case for the fishery sector (Commodity Board for the Fishery Sector, interview). The CBS follows the registration system of companies of the Chamber of Commerce.

A large part of employment is accounted for by self-employed workers, mainly in the cutter fishing sector. According to figures from both employers' and employees' organisations as well as from the Commodity Board, around 500 employees work in the inland fishery and the shellfish sector, and 200 in fish farming. According to the same source, in the trawl fishery sector 450 employees work on ships under the Dutch flag. The number of workers in the trawl fishery sector is larger if Dutch employees that work under foreign flags are included, but the exact number of these workers is not known. (source: interview Productschap Vis; RVZ). Wages in the sector are not wages in the actual sense of the word, but the workers in the trawler sector work as so-called share fishermen, that is, in principle they receive a percentage of the catches' value as their pay. Only if the amount of this share falls below a certain level do the workers in the trawler sector receive a "guaranteed" wage. The same principle goes for the share fisher men in the cutter sector, albeit that they are not employees but self-employed. The education level of the workers in the fishing industry is relatively low. Quite often, fishermen may even be unskilled. If they fulfil nautical duties, they require more education, that is, lower secondary professional level. Ship's officers and technicians need an intermediate vocational level; a few technicians have a higher vocational level. Because of the decline of the sector in recent years, it is not difficult to find adequate personnel. Moreover, fishing is traditionally a father-to-son branch. In the total fishery sector (including fish farming) there are 11, 11% female workers according to Dutch statistics (source: CBS). The sector however, notably the Productschap Vis, the RVZ and the SNV consider this percentage to be too high to be in line with reality. According to the latter three organisations only two women work at sea as "fishermen" (in the cutter sector). Exact figures on the number of women in fish farming are not available, but since the total number of workers in fish farming is about 200, and only a minority of them are women, the fish farming sector cannot account for the high percentage of women in the sector. An explanation may be that CBS counts in office personnel onshore. The Productschap Vis points at another phenomenon, that is, that many wives of fishermen do the administrative work while their husbands are at sea, but are not registered as employees.

Table 2: Workers

Sub-sectors	Numbers of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector / total number of employees in the country (%)	Number of employees in companies < 10 workers in the sector / number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector / number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector / number of employees in the sector (%)	Number of employees in companies > 249 workers in the sector / number of employees in the sector (%)
Fishery (SBI 05)	1,500**	1,800*	0.026*	ND	ND	ND	ND

* Source: CBS, Statline, 2005. This number includes not only offshore, coastal and inland fishery (SBI 0501), but also fish farming (SBI 0502)

** Source: Commodity Board of the Fishery Sector (estimation, 2006).

The Dutch fishery sector, that is the whole fish chain: the fishery sector including the wholesale sector, the processing industry and the retail sector, targets the European market, which is growing, because fish, fish products, crustaceans and molluscs are increasingly important in the daily menu of the European consumer. Supplies from European fishermen is not large enough to keep pace with this growing demand. his is also the case for the Dutch supply. In other words, the domestic supply of raw fish is in relative decline and for some fish species the decline is also in absolute terms. The importance of imports of fish and fish products, on the other hand, is increasing. The declining supply is caused by a combination of factors: natural circumstances in the ecosystems of the (communal) fishing grounds, increasingly stringent (largely European level) fishery policies (quotas), and, especially in the North Sea, there are other uses of resources that are gaining ground, at the expense of the fisheries, such as the generation of energy, the protection of nature, sand and grind dredging and infra-structure projects. Finally, society is increasingly making demands of sustainability on the fishery sector. All of these trends already have lead to a reduction of the fleet during the last ten years, especially in the cutter sector, and will lead to further reduction in the future. As a consequence of the reduction of the activities in the (primary) fishery sector, employment has also been decreasing, especially in the cutter sector, and will be decreasing further in the future. In trawl fishing, other developments serve to slowdown the decline in employment. Most notably, the fact that the trawler sector has had to deal with stricter regulations concerning working and rest times as from the 1st January 2005 (only minor exceptions to the law are accepted) and this has an incidence on employment. The RVZ points out that since the ship officers may work 30% less time compared what they worked before 2005, there is a need for 30% more officers.

2. Description of the organisations active in the sector at national level

2.1 Description of the workers' organisations active in the sector

CNV Bedrijvenbond, Vakgroep Vlees en Vis **(CNV Industrial, Food Production and Transport Sectors, Section Meat and Fish)** is one of the largest of eleven unions that are affiliated to the Christian Trade Union Federation, CNV (*Christelijk Nationaal Vakverbond*), which was founded in 1909, and then re-founded after its abolition in World War II, in 1945. CNV Bedrijvenbond has 90,000 members in the transport sector, the industry sector, the food production sector and the general and technical support services sector. It is a signatory partner to about 600 collective agreements. The organisation is mainly funded by membership subscriptions. CNV Bedrijvenbond is organised into 23 sections. The fishery sector falls within the section Meat and Fish. CNV Bedrijvenbond is the largest union in the fishery sector. Union density, however, is low. CNV Bedrijvenbond has 263 active members in the trawler sector, and an estimated 40 in the shellfish sector. At a total of 1,500 workers in the fishery sector (fish farming excluded), this brings CNV Bedrijvenbond's density to 20%. CNV Bedrijvenbond has 43 active members at the sea fish auction in the municipality *Stellendam*. Out of a total of 250 to 300 workers in the sea fish auction sector, density here is about 14 to 17%. There are no data on the number of inactive members in the sector. In the fishery sector, CNV Bedrijvenbond has mainly low-skilled, blue-collar workers, but also a few higher-skilled workers, like captains and steersmen, as well as a few white-collar workers, like personnel officers. About 1, 5 full-time equivalents work for the fishery sector.
CNV Bedrijvenbond is a signatory partner to the sector level Collective Agreement for Trawler fishing, to the sector level Collective Agreement for Non-EU inhabitants, and to the company level Collective Agreement for the sea fish auction at Stellendam.
The Netherlands does not have a formal recognition system for social interest organisations. Recognition is of a reciprocal nature, that is, there is recognition if the partners accept each other at the negotiation table. CNV Bedrijvenbond, Section Meat and Fish is recognised in this sense. CNV Bedrijvenbond participates in tripartite concertation through its participation in the Commodity Board for the Fish Sector (see below).
At national level, CNV bedrijvenbond is affiliated to the Christian Trade Union Federation, CNV.

FNV Bondgenoten **(Dutch Trade union Federation, Allied Unions)** has originated from a merger of four large FNV unions (*Federatie Nederlandse Vakbeweging*) in 1998: the FNV Industry union, The FNV Transport Union, the FNV Agriculture and Food Production Union and the FNV Services Union. FNV Bondgenoten is mainly funded by membership subscriptions. It is a very large and powerful union with about 450,000 members. FNV Bondgenoten also has some members in the fishing sector, though much fewer than the CNV Bedrijvenbond. FNV is not able to give an exact number[178]. One employee of FNV Bondgenoten works part of his time for the fishery sector (less than 0, 1 fte)

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[178] FNV Bondgenoten points out that this is difficult because many workers in the fishery sector change work every now and then from the fishery to other maritime sub-sectors. it is also difficult to get in contact with the members, because they are offshore most of the time. FNV points out that it is not so much the complete number of members in the fishery that is important, but merely the fact whether or not a certain ship is crewed by union members. Many members on one ship give the union influence on that specific ship. Finally, the FNV points out that in the near future, its members in the fishery sector will be taken over by the Federatie van Werknemers in de Zeevaart (FWZ, Federation of Maritime Workers).

FNV Bondgenoten is recognised reciprocally. FNV Bondgenoten is a signatory partner to the sector level Collective Agreement for the Trawl Fishery and to the sector level Collective Agreement for Non-EU Inhabitants. In the negotiations FNV Bondgenoten is not always present and in those cases has itself represented by the representative of CNV Bedrijvenbond. At company level, this organisation is not a signatory of any collective agreement. It participates in tripartite concertation through its participation in the Commodity Board for the Fish Sector (see below).
At national level, FNV Bondgenoten is affiliated to the Dutch Federation of Trade Unions, FNV, which is the largest federation of unions in the Netherlands.

Table 3. Workers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
CNV Industrial, Food Production and Transport Sectors, Section Meat and Fish	ND*	346	20%	Yes	ETF	-
Dutch Trade union Federation, Allied Unions	About 450,000	ND	ND	Yes	ETF	-

Source: Interviews with the organisations.
*data for the number of members of the Section Meat and fish. There are 90,000 members for the complete CNV industrial, Food Production and Transport Sectors, i.e. all sections of this union.

2.2. Description of employers' associations active in the sector
The three large holding companies in the Dutch trawl fishery sector are represented by the *Redersvereniging voor de Zeevisserij* **(RVZ – Ship-owners Association for the Offshore Fishery).** So, the RVZ covers the complete trawler sub-sector. These holdings include all 3 companies that are active in this sector, so RVZ's density is 100%. RVZ was founded in 1916. Before that, the sector consisted of many companies that were represented by RVZ. By way of mergers this number has decreased until only the three large companies that exist now remained. RVZ has two fte's working for the Association. It is funded by way of its membership subscriptions.
RVZ is recognised reciprocally. The RVZ is a signatory partner to the sector level Collective Agreement for the Trawl Fishery. All companies in the trawl fishery sector are covered by the sector level collective agreement. RVZ does not participate in company level bargaining because there are no collective agreements at company level in the trawl fishery sector. RVZ participates in tripartite concertation through its participation in the Commodity Board for the Fish Sector (see below).
At national level, the RVZ is a member of the employers' organisation, the *Stichting van de Nederlandse Visserij* (SNV - Foundation of the Dutch Fishery). The SNV is a member of *Europêche*, the Association of national organisations of Fishing Enterprises in the EU. At European level, the three member companies of RVZ have been members of the Pelagic Freezer-trawler Association (since 2000).

The Stichting van de Nederlandse Visserij **(SNV, Foundation of the Dutch Fishery)** deserves special mention. It was founded in 1948 by organisations of the large and small sea fishery sector, the coastal fishery sector, the inland fishery sector, including the fishery at the Ijselmeer. Later, also the mussel farming sector joined the SNV. At this moment, the following organisations are members of the SNV:

- Redersverenining voor de Zeevisserij (Ship-owners Association for the Offshore Fishery)
- *Nederlandse Federatie van Visserijvereninging* (Dutch Federation for Fishery Associations) (organises 7 local fishery associations)
- *Nederlandse Vissersbond* (Dutch Fishers' Union) (founded in 1934, has 270 members in the cutter sector, in the shellfish production sector and in the inland fishery sector).
- *Vereniging tot bevordering van de Zeeuwse Vissersbelangen (*Association for the promotion of the fishery interests of the Province of Zeeland)
- *Combinatie van Beroepsvissers* (Combination of professional fishermen)
- *Vereniging van Schippereigenaren* (Association of Shipowners)
- *Nederlandse Bond van Garnalen Kustvissers.*

The SNV functions as a joint consultative body for the complete fishery sector and promotes the interests of the sector both at national and international level, though its priorities have shifted more and more to the international level, since the future of the Dutch fishery increasingly is being determined at this level. The SNV does not itself participate in CB, nor do most of its members, with the exception of the RVZ that therefore has been described above in more detail. The SNV is funded by membership subscriptions. It has around 2 fte's working for it. The SNV shares its secretariat with the Commodity Board for the Fishery Sector. The SNV is recognised as a negotiating partner in the European SD by the other negotiating partners. It is also recognised by the Dutch fishery sector as its representative in influencing international policies.

Other employers' organisations do exist in the rest of the fishery sector. As they are not active in CB and are not member of a European organisation, they won't be detailed in this report.

2.3. Description of the organisation of self-employed in the sector

Share fishermen are organised in the *Vereniging voor Opvarenden* **(VVO – Association for Share fishermen)**, the so-called *Knechtenbond*, which literally translated means Servant Union. This designation indicates that it is rather a workers' union than an entrepreneurs' organisation. Recently, the VVO is negotiating with CNV Bedrijvenbond to merge into the latter and to continue its work as a member group of CNV. This would provide the Association with the support of a professional organisation, while being able to continue its work based on its own longstanding experience. The 11 sea fish auctions have been merged into three companies that have regular consultations among one another.

Employers' organisation

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
Ship-owners Association for the Offshore Fishery	3	450	100%	Yes	Europêche *	-
Foundation of the Dutch Fishery	ND	ND	ND	No	Europêche	-

Source: interview Productschap. Websites of the organisations.
* The three members of the RVZ at European level are members of the Pelagic Freezer-trawler Association.

3. Description of the SD in the sector at national level

3.1. Description of bipartite social partners' structure: the Commodity Board[179]

In addition to the social partners, there is another player with an important role in the fishery sector in the area of industrial relations - the 'commodity boards' (*productschappen*). Commodity boards are public bodies, established by the *Sociaal Econonomische Raad* **(SER Social Economic Council)** at the initiative of the sector concerned, the task of which is 'to promote business operations by the businesses for which it has been established that they serve the general interest, and to represent in general, the collective interests of the businesses and the persons involved' (article 71 of the Industrial Organisation Act [*Wet op de bedrijfsorganisatie*] 1950). They bring together businesses which work with the same product, from raw material to end product (i.e. vertical organisation of the production chain). Apart from the commodity boards, there are also *bedrijfschappen* **(industry boards)** that organise businesses, which have the same function in the economic sphere, such as retailing or catering businesses (i.e. horizontal organisation). The boards of control of these commodity boards are made up of equal numbers of representatives of employers' organisations and of trade unions. Commodity boards may be established in all sectors, but the majority of them are still in the agriculture and the fishery sector. This may have something to do with their task of implementing legislation. Agriculture and fishery in particular have to deal with a huge amount of EU Directives and Regulations. Thanks to their specific expertise, commodity boards (and other industry boards) are not only involved in the preparation of EU legislation, but also in converting it into national regulations and the implementation of these regulations in their sector. The commodity boards in the agriculture and the fishery sectors have increasingly been gaining prominence as the place where the collective interests of the sectors are represented. The boards are also focusing increasingly on social policy with regard to employees in the sector, rather than simply the economic interests of employers. However, they do not participate in CB.

The boards are a typically Dutch phenomenon, which fit into the 'polder model' of consultation. There are organisations in other countries with similar responsibilities to those of the boards, but these are usually agencies of the state, as in France, or bodies set up by business organisations, as in Germany. A bipartite structure such as that in the Netherlands occurs almost nowhere else.

3.2. Description of the tripartite concertation in the sector

Tripartite concertation in the fishery sector mainly takes place through the platform of the Commodity Board. There are regular contacts and consultations between the board and government representatives. This Board has consultations with different ministries on a regular basis, mostly regarding the implementation of EU regulations. The Commodity Board not only represents the fishery sector (including fish farming), but also the fish auction sector, the fish wholesale trade, the fish processing industry and the fish retail sector. Its board is composed of about 30 representatives of many different organisations in the fishery sector. In 2005, the following organisations were members of the Commodity Board:

- Nederlandse Vissersbond (Dutch Fishery Union) (2 seats)
- Vereniging van Schippers-Eigenaren (Association of Shipowners) (1 seat)
- Redersvereniging voor de Zeevisserij (Ship-owners Association for the Offshore Fishery) (1 seat)
- Federatie van Visserijverenigingen (Federation of Fishery Associations) (1 seat)
- Vereniging tot Bevordering der Zeeuwse Visserijbelangen (Association for the Promotion of the Fishery Interests of the Province Zeeland) (1 seat)
- Combinatie van Beroepsvissers (Combination of Professional Fishers) (1 seat)
- Nederlandse Vereniging van Viskwekers (Dutch Association of Fish Farmers) (1 seat)
- CNV Bedrijvenbond (CNV, Industrial, Food Production and Transport Sectors) (3 seats Fishery, 2 seats Trade)
- FNV Bondgenoten (FNV Allied Unions) (1 seat Fishery, 2 seats Trade)
- Visfederatie (Fish Federation) (7 seats)
- Verbond van de Nederlanse Visdetailhandel (Union of the Dutch Fish Retail Sector) (1 seat)
- Centrale Vereniging voor de Ambulante Handel (1 seat)
- Nationaal Overleg Visafslagen (National Consultation Platform Fish Auctions) (1 seat)

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[179] The Commodity Board exceeds the fishery sector as such, and includes also the fish auction sector, the wholesale trade, the fish processing industry and the retail sector.

This list of members does not include the chairperson, the substitute chairpersons, the secretary and the substitute secretary of the board, who are not representatives of one specific organisation.
The seats on the board are equally divided between employers' and employees' organisations. Also representatives of the Ministries of Agriculture, Nature Conservation and Fishery, of Economic Affairs, of Social Affairs and Employment, of Health, Well-being and Sport can join the board meetings. Tripartite concertation is mainly directed at influencing national government policies as well as policies at the international level, by informing the government, the media and the public on the interests of the fishery sector while at the same time getting a clear picture of the possibilities, the wishes and obligations of the government, the environmental movement as well as other social interest groups.
There are no signed agreements or pacts. There is an ongoing process of consultation with regard to issues of sustainability, economic feasibility, social demands and political acceptance. Beside this process of influencing policies at national and international level, while representing the interests of the sector, the Commodity Board provides knowledge, expertise and support to companies that are too small to deal with certain tasks and issues themselves.

3.3. Description of the bipartite dialogue in the sector

a) At sector level

Bipartite dialogue in the fishery sector is restricted to the sub-sector in which large companies operate with a certain number of employees, the trawler fishing sector. There is no obligation to participate in CB at this level. Here, a collective agreement is negotiated. In addition, the sector has a collective agreement for non-EU inhabitants, regulating their specific employment conditions. The signatory partners on employers' side are the RVZ and on employees' side the CNV Bedrijvenbond and FNV Bondgenoten. Since the enlargement of the EU, the group of non-EU inhabitants has obviously declined.

Table 5. Sector level collective agreements in the trawler fishing

Agreement	Parties		Duration	Coverage
	Trade Union	Employers' organisation		
Collective Agreement for the Trawl Fishery	1. CNV Bedrijvenbond 2. FNV Bondgenoten	RVZ	1 January 2005 - 31 December 2006	Though not generally extended, 100% coverage because all companies are represented by RVZ.
Collective Agreement for Non-EU Inhabitants	1. CNV Bedrijvenbond 2. FNV Bondgenoten	RVZ	1 January 2005 – 31 December 2006	Though not generally extended, 100% coverage, because all companies are represented by RVZ.

Source: interviews CNV, FNV, and Commodity Board.

The collective agreement for trawler fishing differs in many respects from any other collective agreement, due to the specific working conditions in the sector. First of all, the principle of pay based on a share of the catch's value, which is actually payment by results, is not very common in Dutch industrial relations, certainly not to the extent that this is carried out in the fishery sector (at present, total remuneration is based on results, except in cases where the catch is very low). The principle of share fishing also has consequences for other parts of the employment conditions. FNV points out that it is difficult to negotiate special arrangements for special groups of workers, e.g. the elderly workers, because the result of this is directly felt in the pay the fishermen receive. Moreover, working times are an issue in the sector, since these too have a direct influence on the workers' income. The shorter hours worked per employee, the more workers are needed on a ship and this directly influences their income. The workers are also motivated to do long hours, since they are offshore anyway and obviously cannot return home in between their shifts. However, the Working Time Act has been applied more strictly as from 1st January 2005. Furthermore, specific issues occur in the collective agreement that are connected with the fact that the workers in the fishery sector are offshore for periods of many weeks on end. There are provisions for compassionate leave and for the relief of specific social-economic problems that might occur, e.g. a sick relative of a worker at sea.
As far as the bipartite SD at sector level is concerned, there are no obstacles to its development. Indeed, there are no conflicts between the social partners; the negotiations are of a consensual nature. However, there is no specific promotion; the dialogue is an ongoing process.

The cutter sector works on the basis of contracts with share fishermen and therefore has no CB arena, the inland fishery and shellfish production has small to very small companies that have no collective agreements. There is no specific promotion of it.

As far as the players' positions with regard to future developments in the SD in the trawl fishery sector are concerned, we observe that important items in the sector are the working and rest times, since the Working Times Act has to be applied to the fishery sector more strictly. This creates problems for employers because the crew has to do its work in less time and they complain about the underutilisation of capacity that occurs as a consequence. Moreover, they need more personnel to do the same amount of work, which is not always easy to find at the national labour market. They plead for reciprocal international recognition of navigation licences so as to be able to hire personnel from abroad. Another solution for the stricter working time regulations is productivity improvement. The RVZ currently has commissioned research that should look for possibilities for efficiency measures. Employees, too, are often not positive about stricter working times, because this may lead to profits of the catch being divided between more personnel. Unions care about the fact that the costs of stricter working times regulations and underutilisation are not passed on to employees,

b) At company level

There is no obligation to participate in CB at company level. In the sea fish auction sector, one large one, the Stellendam Auction, has a company level collective agreement. It concerns regular issues like wages, working time, etc. Though the latter has not been renewed recently, the expired agreement is still being applied with the consent of both parties. Thus, recently, no new collective agreement has been concluded. Workers covered by these collective agreements are blue collars. The company covered by this agreement includes 43 workers, i.e. about 14 to 17% of the workers in the sea fish auction sector. There is no procedure for extending collective agreements to parties that are not signatories to the agreement. There is no player who, although not recognised by the dominant players or by public authorities, must be regarded as playing a role in industrial relations in the sector. There have not been major changes in the past nor are major changes expected in the near future concerning the positions of the players in the SD at company level.

There is no link between the sector and company levels. The sector level is the one where most dialogue takes place in the trawl fishery sector.

Comment

From the point of view of CB, the Dutch fishing sector is a special sector, because of the phenomenon of the share fishermen, who are neither ship-owners nor employees in the legal sense of the word, and have no CB coverage. This may change, if the Association of Share fishermen, VVO, merges into the union CNV Bedrijvenbond, and if general government policies concerning the self-employed develop in the direction of that of wage earners. Until then collective agreements are only reached in one part of the fishery sector, that is the trawler sector, where medium-sized companies operate. Also, one larger sea fish auction has a company level collective agreement. The cutter sector, which is manned by share fishermen, and also the small-scale sub-sectors of the inland fishery and the shellfish production fall outside the CB coverage.

The organisation density of employers in the trawl fishery sector is 100% since all three (after a recent merger) holdings in the sector are members of the employers' organisation RVZ. Even though they do not engage in CB the other sub-sectors are relatively well organised in response to stringent European and national regulation.

On the employees' side, organisation density is low. The largest union in the sector, CNV Bedrijvenbond has a density of 20% (average union density is about 27%) and the FNV Bondgenoten is estimated to have only "a few" members in the sector. Union density among the employees of the sea fish auctions is estimated at 14 to 17%.

POLAND

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

Polish Classification of Activities (Polska Klasyfikacja Działalności, PKD) for the sea fishery corresponds to NACE classification.

Nevertheless, the Polish employees and employers organisations investigated in the basic maritime economy include the following activity types from PKD nomenclature: fishing (coastal fishing, sea fishing – 05.01.B, fishing service activity - 05.02.B); cargo holding (63.11) and cargo storage (63.12) service enterprises, which the basic activity is cargo holding in sea ports; real estate management and sale (70.11); maritime and coastal water transport (61.10); activity of other transport agencies (63.40).

SD on fishery is conducted by Trilateral Team of Sea Shipping and Sea Fishing in Ministry of Labour and Social Policy. The team works on problems associated with the maritime economy, especially with shipping (PKD section: 61) and during team meetings fishing is discussed from time to time.

1.2. Socio-economic features of the sector

In 2005, the fishing sector accounted for 0,03% of Gross Domestic Product [180].

In Poland, there is a high level of black economy activities in the fisheries sector. This is due to several reasons. Firstly, the characteristics of the sector, such as its seasonality tend to engender this type of employment. Secondly, there are economic reasons: low fish prices, high fuel and working costs, difficulties for employers caused by the legal requirements, high insurance costs, low profitability of fishing[181], etc., encourage the fishing boat owners to reduce costs by illegal employment or a family member's fictitious employment[182]. Besides this, they delegate employees, who officially take unpaid leave, to work under other countries' ensigns, where they sign contracts. This generates lower income from taxes and less control over working conditions. Finally, since lack of work for fishermen is the main problem, they readily use the possibility of scrapping the fishing boats and getting compensation. Trade union officers estimate that there is a large number of fishermen who are officially working (signing agreements) for a minimal wages (approximately 100 Euros) and who are unofficially getting higher tax-free wages (approximately 800 Euros). Bad working conditions and exhaustion of fishermen, working illegally,(they work for 20 hours per day) are the most common reasons of work accidents. Exceeding fishing quotas for the Baltic Sea should be also counted as a black economy. The main problems for Baltic fishermen are fishing quotas and limited seasons.

The Polish open-sea fishery operates on the Pacific and the Atlantic Oceans fishing grounds and also in the arctic fishing areas. Final product is mainly sold for export. Fishing takes place in the foreign exclusive economic zones. The conditions of access are regulated by bilateral and multilateral agreements.

Currently there are 1206 companies[183] active in the Fishing Industry sector. As stated above, there are companies with Polish capital, employing mainly Poles registered abroad and sailing under foreign ensign (for example Cyfadaco company registered on Cyprus)[184]. In 2003, there were 1,408 boats, shipping boats and trawlers sailing under Polish ensign. Eleven of them belonged to the public sector and 1,397 to the private sector.[185]

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[180]Source – The Department of Fisheries in the Ministry of Agriculture and Rural Development.

[181] The Polish fishing fleet is divided into two main groups: deep-sea fishing and Baltic Sea fishing, the latter being also subdivided into the cutter fleet (ships longer than 15 m) and sea vessels fleet (vessels not longer than 15 m). The low profitability of fishing is particularly due to the fact that the Baltic fishery cutters and sea vessel catch potential is higher than what would be needed to meet the fishing quotas and because of the outsourcing of the fleet and its high exploitation costs (low level of modernisation of the fishery fleet).

[182] Listing family members as shipping boat workers is beneficial especially when the boat is scrapped and compensation is paid.

[183]Central Statistical Office: economic entities, quarterly statement 2006. The Statistical Office lists all the economic units that have been registered to be allowed to practise activities. This number is therefore most probably overestimated, since it encompasses economic units that never take off, units that have quickly stopped activities and very small units (without any salaried worker). This figure is, therefore, always higher than what the unions and management consider currently as being the number of companies active in that sector.

[184]The ETF requested that this sentence be converted to: "As stated above, there are companies with Polish capital, employing mainly Poles registered in Poland and sailing under Polish flag. Only a few fishing trawlers sail under a foreign flag (Maltese) -*Cyfadaco in Cyprus concern merchant fleet*-. Further to this comment, the author of the report answered that "Most of the interviews (i.e. interviews with the representatives of the trade unions, the employers' organisation DALMOR and the Ministry; for more details, see the Polish validation table p. 172 and 173 in

Companies in 2006[186]

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Total of the sub-sector 0501B	1,206	ND	96,6% (1,165 companies)	3,2% (39 companies)	0,1% (1 company)	0,1% (1 company)

Source: Central Statistics Office: Employment, wages and salaries in national economy in I Quarter of 2006, Warsaw 2006

Current information on the distribution of employees in the fishing sector is not available. Employment in the marine fisheries sector is estimated at 3,500 units. The great majority of sea fishery employees is constituted by fishermen working on the ships, not many administrative workers are engaged in the sea fishery sector. The deep-sea Fishing Company "Dalmor" from Gdynia, which has well developed administration is an exception (120 out of 600 employees of this company are administrative workers). According to its own statements, "Dalmor" employs 600 people, but the Ministry of Agriculture and Rural Development's representative claims that "Dalmor" double counts the workers working in shifts. Ministry estimations are lower also because they do not count workers sailing under the foreign ensign as they do not pay taxes in Poland. The main problems for the open-sea fishermen are lack of work, difficulties in being able to sign contract and working conditions on the ships. No data on atypical work is available. The education level of the sea fishing sector is as follows: primary 10%, gymnasium 1%, basic professional (fisherman profession) 25%, basic professional (other professions) 37%, secondary general 12%, secondary fishermen 11%, over-secondary general 11%, over-secondary fishermen 1%, university general 1%, university fishermen 1%. The average salary in the sea fishing sector in 2003 for workers was about 440 Euros before tax and, for other employees 756 Euros before tax (no data for the year 2005)[187]. In 2004, women engaged in the fishing sector constituted 1.1% of the all employees. [188] Due to the lack of work, not many young people are employed. Workers mainly belong to the upper age groups: 15-19 years old – 0.3%, 20-24 years old – 4.7%, 25-29 years old – 9.6%, 30-34 years old – 13%, 35-39 years old – 10.3%, 40-44 years old – 18,4%, 45-54 years old – 20,4%, older – 23,3%[189]. Employees and trade unions are concerned about changing the retirement age to 65 for deep-sea fishermen. In their opinion, workers in this age group are inefficient.

For some years, a decline in fishing can be observed. It is related to the lack of profitability in those companies, which could not stand the transition, the reduction of the fishing area and also the attractiveness of the ship scrapping scheme. Ten years ago, there were over 50 ships in the Polish fishing fleet. Now "Dalmor" has only one ship under Polish flag. There are two big companies in the market – single-entity joint-stock company of the State Treasury[190] "Dalmor" (deep-sea fishing company) and The Fishing and Fish Services Company (PPiUR) "Szkuner" – a cutter company catching fish in the Baltic, and some small cutter enterprises.

2. Description of the organisations active in the sector at national level

2.1. Description of the workers' organisations active in the sector

According to the Trade Union Act of 23 May, 1991, a trade union is an independent and voluntary organisation of employees that represents them and defends their rights and professional and social interests. Trade unions in Poland function according to article 59 of the Constitution and the above mentioned Trade Union Act. The Act also allows them to form national federations of

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the EU25 report) show that the majority of the ships sail under foreign ensign. This generates fiscal losses for Poland, as well as a big difficulty for the unions to be present among the workers of these ships. Most of the interlocutors did confirm that this is in fact the main issue in the sector. This reality has also been confirmed as being accurate by the Ministry. »

[185]Number for 31st December 2003. Statistical Year Book of Martitime Economy, Warszawa – Szczecin 2004, p. 175

[186] Representatives of the Ministry of Agriculture and Rural Development stressed that all the data were only estimated there is no tough data yet.

[187] Statistical Year Book of Martitime Economy, Warszawa – Szczecin 2004, p. 25.

[188]Source – The Department of Fisheries in The Ministry of Agriculture and Rural Development.

[189]Source – The Department of Fisheries in The Ministry of Agriculture and Rural Development.

[190]Public company.

trade unions. These can, in turn, form national inter-union confederations. A union may be created by at least 10 authorised employees (irrespective of the formal status), members of agricultural cooperatives and people working on agency agreements. Other people may also join the unions. The union needs to be registered in National Court Registry. According to §31 of the Trade Union Act, the members of the Board of the establishment union organisation are exempted from working as long as they are elected. With the growing number of members, more union officials can be exempted from work. If the union consists of 150-500 members, one person can be totally exempted from work. If there are 501-1000 members, then two workers can be exempted. With the growing number of members, more people can be exempted from work.[191]

2.1.1. National Maritime Section NSZZ "Solidarność" (Krajowa Sekcja Morska Marynarzy i Rybaków NSZZ „Solidarność")[192]

The NSZZ "Solidarność" was founded in 1980 after the so-called Gdańsk strikes, as a result of the political transformation and the revised status of "Solidarity". The trade union has a dual structure: a territorial structure, and branch structure. Branch sections are administered by common secretariats (there are 15 of them). The National Maritime Section (KSM) is a branch section organising seamen and fishermen. Nine basic organisations come together in this section. The section has 11 offices. Theoretically, the section covers the whole country, but in practice it is limited to the coastal zone. Inland water fishermen do not belong to the section. Only eight full-time employees work in the KSM. The Independent Self-Governing Trade Union (NSZZ) "Solidarity" is active in all sectors of the economy. The characteristics of the section were influenced by the economic changes.

KSM represents the interests of Polish sailors and fishermen in the country and abroad. Former and present employees of the big enterprises: "Gryf" in Szczecin (the enterprise is bankrupt), "Odra" in Świnoujście (the enterprise is bankrupt) and "Dalmor" in Gdynia are members of the section. KSM organises more than 8,000 Polish sailors and fishermen working on the vessels under foreign and national flags, in Polish ship-owners companies and for a few foreign employers. Fisheries members of KSM are mainly fishermen, fishermen & processors, mechanics etc. but the organisation is open to all the occupation groups' members and all working positions: captains, chief mates, engineer officers, electricians, seamen, hotel crew members and cadets. It is not easy to determine the exact number of fishermen, because many of them simultaneously hold sailor certificates. Members of the trade union work as fishermen during the season on the cutters and after the fishing season as sailors on the ships. There is no differentiation inside the section between fishermen and sailors although they have different problems and needs. The smallest member group are lagoon fishermen. The trade union has problems with recruiting new members. Ship-owners try to avoid employing trade union members and fishermen do not want to become members as they do not have permanent contracts. The fishermen working on small cutters, sailing alone or with family members, occasionally engaging other people during the season, do not belong to the trade union. They are self-employed. The organisation supports itself from membership subscriptions. The subscription is 1% of the employee's wage, out of which 60% go to the basic organisations, 25% go to the regional union management, 10% to National Commission, and 5% to National and Regional Strike Funds. The money goes to, among other things, the care fund, the educational fund, the social fund and the strike fund. Subscriptions also are used to pay for lawyers in Poland and abroad and to help the employees working abroad, according to the ITF policy. A part of employee training costs is reimbursed by the organisation.

According to the representative of the Union, the unions are well organised in Poland, whereas the employers are not well organised and so they are not effective negotiating partners. Because of the small number of ship-owners in Poland, the occasions when the union intervenes are rare. When the workplace is a ship, which sails somewhere on the seas, under different flags, then the employer does not really intervene in the activities of the union. The organisation has the power to negotiate and sign collective agreements for the sector. Nine collective agreements in the sector have been signed up until now. The section has signed agreements with establishment and inter-establishment union organisations. At the company level, it is the same case and the Union has signed collective agreements with about 200 ships, sailing under the "flag of convenience" on which Polish sailors work. The ships are managed by both Polish and other ship-owners. As far as the tripartite dialogue for the sector is concerned, the organisation takes part in the dialogue and has the power to negotiate at this level for the sector. It is a part of the Trilateral Team of Sea Shipping and Sea Fishing and it can sign collective agreements. The Trilateral Team has no power to sign any collective agreements. According to the representative of the Union, the team which deals with SD in fishing is too big a body to be capable of achieving much. Even if "Solidarność" wants the SD in the sector to be working well, much depends on the good will of the government. The succeeding cabinets have different policies towards fishing and the idea of forming trilateral teams. In theory, the team should initiate the passing of bills concerning the maritime economy and also give its opinion on different proposals for legislation. However, such an activity is still in the realm of concept and has not been put into practice. Contrary to what the situation is in other EU countries, there are no legal regulations dealing with sector SDs, which causes difficulties in the team with every change of government. The Trilateral Team for Sea Shipping and Sea Fishing works inefficiently because of a lack of activity from government side. Its unstable formal situation causes even more problems since the law

[191] Michał Wencel, Obrzeża sektora. Związki zawodowe (On The Edge of the Sector: Trade Unions), Warszawa, 2005.
[192]Representative of National Maritime Section NSZZ 'Solidarość' : Henryk Stachowiak, Assistant to the President/Fisheries dept.

does not make the decisions of the Team binding, although the internal regulations of the Team enforce respect for the agreement and fulfilment of the commitments. The union representative stated that only the workers' unions care about the SD in the sector of sea fishing, and the Trilateral Team was created thanks to them. He also stated that the unions should not make laws, as it makes the negotiations with the employers more difficult. The union should only control the process of making laws, and give its opinions on the proposed bills. According to the union, subjects which should be dealt with are: the planned amendment of the employment code, pensions for the disabled, the proposal for the fishermen to work until they are 65 years old or to retrain after the age of 50 or 55 (the age varies according to the different sources), the reduced period of protection before retirement, the black economy created by signing unprofitable agreements, failure to abide by safety regulations on the ships and the lack of employment opportunities[193]. Collective agreements with certain ships are signed for a period of one or two years, and after this time they are renegotiated. KSM monitors how the ITF collective agreements are observed, mainly with regard to working conditions, on-time payment, work schedules and food supplies. There are two ITF inspectors in Poland. The union also tries to negotiate working conditions in those workplaces where only a few of the workers are members of the union and where the members do not disclose themselves. However, in these cases the union is not treated as a partner for serious talks. One of the members of the Union stated that during negotiations, there is always some tension, mainly because the employers would like to lower the costs, and the unionists on the other hand would like to raise wages. The employers are not very eager to negotiate, but they are forced to, since if there is no collective agreement then the employer can be subject to certain restrictions in ports, because of the cooperation of the Union with ITF.

KSM is one of the founders of the European Transport Workers Federation (ETF). The section does not belong to any federation uniting representatives of only the fisheries sector. At national level, the organisation is a part of Niezależny Samorządny Związek Zawodowy „Solidarność", the Independent and Self-Governing Trade Union Solidarność (NSZZ "Solidarność" / NSZZ "S").

2.1.2. The Seamen's & Fishermen's Trade Union Federation (SFTUF) (Federacja Związków Zawodowych Marynarzy I Rybaków)[194]

The Federation was created in 1984, continuing the activities of the Trade Union of Seamen and Port-Workers, which was liquidated in 1981. It then consisted of 11 establishment union organisations which operated in the Polish sea shipping and open-sea fishing companies, as well as in the Maritime Bureau and maritime upper-education institutions. Nowadays, it consists of 5 union organisations. It is the founder of the "Astrum Balticum" Foundation. In SFTUF there are four people employed full-time. Sub-sectors covered by the organisation are Cargo handling (63.11), Cargo storage (63.12), other activities supporting water transport (63.22), activities of other transport agencies (63.40), real estate management and sales (70.11), maritime and coastal water transport (61.10), fishing and fisheries service activity (05.02.B).

The union organisations included in the Federation were active in three fishing companies. However, now there is only one company which has its own union – "Dalmor". The union established there, Inter-Establishment Trade Union "Dalport", is a member of the SFTUF. Out of the 630 people employed in "Dalmor", 400 are members of the union. The members of the SFTUF are people working in the management of the companies, in reloading and in sea fishing. The interests of the fishermen are represented in one of the union organisations, in the Inter-Establishment Trade Union "Dalport", which mainly consists of the employees of the "Dalmor" company. The cutter fishermen are not members because they encounter different problems than the employees of big companies (e.g. the limit of catch or the amount of the subsidies for fishing). The organisation supports itself from the membership subscriptions. The subscription is equal to 1% of the minimum wage, and about 80 % of it remains in the company. The subscriptions are allocated to the welfare, training, social, and strike funds. They also cover the costs of the lawyers who represent the fishermen in courts in Poland and abroad, as well as the costs of the realisation of the ITF agreements concerning helping those working abroad. The money the members put into upgrading their qualifications are partly given back to the members.

The representative of the union assesses the cooperation between the trade unions and the company as being successful. In his opinion, people cooperate for the well-being of the workers. The trade union can influence such important issues as payment, working conditions and social funds. The organisation takes part in CB at sector level for the sector and has the power to negotiate and sign collective agreements. The Federation consists of five trade unions which signed an agreement: Trade Union "Dalport", Seamen's Trade Union, Trade Union of the Employees of PŻB SA, Trade Union of the Maritime Bureau in Szczecin, Contract Seamen's Trade Union. The Federation signed an agreement with the National Maritime Section of NSZZ "Solidarność", and so they have one common representative. At company level, it is the same case. One collective agreement has been signed with "Dalmor" Joint – Stock Company. Even if the

[193] The ETF requested that this sentence be converted to : "According to the union, subjects which should be dealt with are: the planned amendment of the employment code, pensions for the disabled, the proposal for the fishermen to work until they are 65 years old or to retrain after the age of 55, the reduced period of protection before retirement, the black economy created by signing unprofitable agreements, failure to abide by safety regulations on the ships and the lack of employment opportunities." After verification by the national expert, "Data do vary between 50 and 55 years old according to the social partners. Solidarnosc suggests 55. It seems to us that the range 50-55 would be the most accurate to indicate in the study. »

[194] The representative of the Seamen's & Fishermen's Trade Union Federation: Bolesław Zasada, Vice-president

organisation takes part in CB at tripartite concertation specific for this sector, it has the power to negotiate and to sign collective agreements, there have been no agreements signed in the Trilateral Team. In the opinion of the representative of the Federation the problem lies in the lack of a trilateral agreement for Polish fishing. He says the government is to be blamed for this situation, as there are no government proposals for dealing with this situation. It seems that the problem is that the union, being strongly attached to the company by which it exists, represents the interests of this particular company. From what was said during the conversation with the Director of “Dalmor”, it occurs that the Director himself is concerned that the Trilateral Team for Sea Shipping and Sea Fishing should be effective.
At national level, the organisation is affiliated to Ogólnopolskie Porozumienie Związków Zawodowych; OPZZ - All-Poland Alliance of Trade Unions.

These organisations are both recognised through legal and reciprocal recognition, on the one hand through the OJ and on the other hand because they have a right to make establishment-level collective labour agreements. As members affiliated to ITF they have a right to make collective labour agreements abroad, with foreign ship-owners. Every collective labour agreement is made with an employer; if the employer is not Polish, but a “convenience flag” and there is no national collective labour agreement, ITF makes the agreements. Local ITF inspectors assist the fishermen working abroad.

Workers' organisation(s)

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
National Maritime Section NSZZ “Solidarność”	8,000	About 700	20%[195]	yes	ETF	ITF
Seamen's & Fishermen's Trade Union Federation	600	600	17,14 %	yes	ETF	ITF

Source: interviews with organisations, may 2006.

2.1.3. Other not recognised worker's organisations

In the fishing sector in Poland there are also other trade unions which do not take part in the bi- and tri-lateral agreements. These are, among others: the Seamen's & Fishermen's Trade Union (SFTU), affiliated to the Forum of Trade Unions. This organisation, which was created because of a personal conflict, organises seafarers and fishermen. The members, as in the two previous cases, work on deep-sea ships. A representative of the union concluded that the activities of the organisation are rendered difficult by some, mostly by “Dalmor” and “Dalport”. It does not belong to any international association. The representative of SFTU thinks that the two other unions do not act in favour of their members. The representatives of this Union are not invited to the meetings of the Trilateral Team for Sea Shipping and Sea Fishing. Twice they even caused the breaking off of negotiations, because they did not agree to leave the place of negotiations, even though they were not welcome there.

There are a number of fishermen's associations in Poland, such as the Association of Fishermen of Zalew Szczeciński and Jezioro Dąbie, which bring together inland fishermen and the owners of small family companies (those fishing with one cutter). Their problems are connected mainly with the catch limit, the amount of subsidies, the methods of fishing etc. The members of the associations do not sign any agreements, and they do not know about the existence of programs like the Sector Operation Programme “Fishing and Fish Processing“. They usually act as self-employed people, and they employ only a few fishermen, often without a contract. They concentrate on fishing and they consider everything outside this as the activities of the government, as

[195] The ETF proposes a density of 8.75% (700/8,000). But, as indicated in the introduction to the report (see p.6), density (of employees) is the number of employees who are affiliated to the organisation concerned divided:
- by the total number of employees working in the sector within the country, if the activities of the organisation concern the whole sector studied;
- by the total number of employees working in this sub-sector within the country, if the activities of the organisation only concern a sub-sector.
In this case, density is 20% (700/3,500 workers in the sector).

political and they do not see themselves as partners in any important negotiations. They do not acknowledge the need of contacting big trade unions. However, according to the representatives of the Ministry of Agriculture and Rural Development, the associations of fishermen take part in establishing programmes concerned with the problems of the fishing industry in Poland.

2.2. Description of the employers' organisations active in the sector

There is no organisation of the fishing companies. Only trade unions in the two big companies ("Dalmor" and "Szkuner") sign agreements with the employers for particular groups in the establishments.

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

The Trilateral Team for Sea Shipping and Sea Fishing was created in November 2002, following a proposeal by the social partners to replace the Joint Commission for Sea Shipping and Open-Sea Fishing, which ceased to exist by the decree of the Prime Minister as from the 14th March, 2002. The Commission was active from October 2000 to March 2002 as an institution of tripartite SD in the maritime sector. The Team consists of 20 people. As of today, there have been 11 meetings of the team, three of them in 2005.

Those who participate in the concertation from the government side are representatives of the following ministries: Transport and Construction, Agriculture and Rural Development, Finance & Economy, Labour and Social Policy. The co-president of the Team, representing the government, is the undersecretary of state at the Ministry of Infrastructure, responsible for the sector of sea shipping. What is more, the members of the Parliamentary Under-Commission for Maritime Economy are always invited to the meetings. Organisations involved in this concertation are representatives of the employees with three people for each of the following organisations: the National Maritime Section of NSZZ "Solidarność", the National Officers' and Seamen's Trade Union, and the Federation of Seamen's and Fishermen's Trade Unions (OPZZ). The co-president representing this group is the leader of the National Maritime Section NSZZ "Solidarnosc". The employers are represented by five ship-owners, and the president of the Association of Polish Ship-Owners is the third co-president of the Team.

In November 2002 the Ministry of Infrastructure drew up "Guidelines of the New Regulations of Employment and Work on Sea Trade Ships of Polish Membership", with the aim of establishing regulations which would enable the Polish-owned ships to sail again under the Polish ensign. It is assessed that "a new solution concerning the coordination of the social security systems of Polish seamen in the scope of the 1408/71 WE regulation has been achieved. On this basis Polish-Norwegian and Polish-Dutch agreements have been signed, and these averted the danger of 5 000 Poles losing jobs under the Norwegian and Dutch ensigns.[196]

During the meeting of the Trilateral Team[197] it was decided that it should be informed about the law proposals and different regulations of the EU which concern the work of the Team. This decision was taken because of Poland's accession to the European Union, which gives Poles a chance to influence the EU law. The Team agreed also that before taking a stand on new EU laws concerning fishing, the government will put them before the Team to get the opinion of the three sides. Additionally, it was agreed upon that the government will present information concerning the realisation of the agreement on cooperation in sea shipping reached by the government of the Polish People's Republic and the government of the Republic of Cyprus on 18 July, 1984. Another issue that was settled was that at the next meeting the government side, after consulting the employers/ship-owners, would introduce a plan to reactivate and develop the Polish national fleet, both the merchant fleet and the fishing fleet. The government representatives made a commitment to present the situation of the proposition of signing bilateral agreements between Poland and other EU countries (on the basis of the Decree 1408/71 WE). Below we present the information from the Ministry of Infrastructure concerning this particular issue.

On the Trilateral level there have been no agreements signed yet specifying the guidelines presented at the meeting.

It is worth noting that the Trilateral Team for Sea Shipping and Sea Fishing, affiliated by the Ministry of Labour and Social Policy, is a team for SD, and its activity is made public. Despite the regulations on making meetings public[198] (§17), the secretary of the Team does not make any results of its work available. In §6, part 1 of the regulations it says that representatives of other

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[196] The ETF requested that this sentence be converted to the following: "On this basis Polish-Norwegian agreements have been signed, and these averted the danger of 5,000 Poles losing jobs under the Norwegian flag." Further to this comment, the author of the report answered that: « The data collected refer to Polish-Norwegian and Polish-Dutch agreements».

[197] Trilateral Commission is the institution where SD takes place on the highest level for the country.

[198] Regulations of the Trilateral Team for Sea Shipping and Sea Fishing from 05 July, 2004.

trade unions can take part in the meetings as observers, however they are not allowed to do that by the Team. The Seamen's and Fishermen's Trade Union tried to be allowed to be present at the meetings, which caused negotiations to be broken off twice. It should be said that there is a certain threat to the normal functioning of the SD, which can cause social imbalance in the sector. The "Dalport" Trade Union is so dependent on the company where it is active that as a matter of fact it represents the interests of the employer, not the employee. What adds to that is the lack of an employers' organisation, the existence of only two fishing companies, and the blocking of access by other unions' members to negotiations. In the opinion of all three sides, the work of the Trilateral Team for Sea Shipping and Sea Fishing does not bring any results, as the different sides have different expectations. Conflicts arise, mainly with regard to the employer - representative of the government. The company-owners are of the opinion that the catch limits should be changed. The officials from the Ministry attend the meetings irregularly, and they are always changing as are the governments. This makes it impossible to work systematically.
Apart from the Trilateral Team, another group meets 4-5 times a year. It is a team initiated by the Department of Fisheries in the Ministry of Agriculture and Rural Development, and it includes several organisations: the Association of Open-Sea Fishermen, the Association of Ship-Owners, National Chamber of Fish Producers, the Union of Polish Fishermen, the Union of Boat Fishermen, the Association of Fishermen of Zalew Szczecinski, Zalew Kamienski and Jezioro Dabie. The group discusses EU law acts and decrees dealing with fishing, the methods of fishing, the safety periods, the amount of fish one is allowed to catch, the resources of the fisheries. The outcome of the discussions is not signing an agreement. The organisations have bills presented to them on which they have to give an opinion. From the point of view of the Department of Fisheries, this group is much more efficient than the Trilateral Team in the Ministry of Labour and Social Policy. The director of the Department even says that the unionists do not have much to say about fishing, as they do other things than that.

3.2. Description of the bipartite SD in the sector

Because of the absence of a representative organisation for the employers in this branch of industry, the company level is the most developed.

a) At sector level

Bilateral dialogue occurs mostly between social partners, like the trade unions and employers. If no representatives of the government are present, it is described as an autonomous dialogue. The bilateral dialogue does not interfere with the trilateral negotiations. However, in the area of SD, there are spheres in which the main role is played by the social partners, as it is when collective work agreements are negotiated. Workers' organisations involved at this level are National Maritime Section NSZZ "Solidarność" and Seamen's & Fishermen's Trade Unions Federation (SFTUF). As there are no employers' organisations, no agreements are signed at this level.
As far as players' positions with regard to future developments in the SD at sector level in the sector of Fishing Industry are concerned, it seems that when analysing the future needs of the fishing sector in Poland, other employees' organisations must be taken into account, not only those affiliated by the international trade unions, and also the fishermen's associations and the company-owners who do not belong to any employers' organisation (at this moment there are no such organisations). The obligation to participate in CB at sector level comes from the regulations of law (Trade union acts, Employer's organisation acts, Collective disputes solving acts, and the Tripartite Commission for Social and Economic Affairs act). No official data on possible conflicts between players regarding recognition issue is available. But during this research all the parties participating in the SD indicated discrepancies of interests and discrepant legal solutions proposed respectively by the representatives of the government, of the trade unions and of the employers. All the parties have negative opinions about the activities of the Tripartite Team, and none of the parties felt fully responsible for it. All three parties accuse each other of activities which have adverse effects on the Polish sea fishery industry. The relations between trade unions and the employers cannot be called openly hostile. They are, however, tense. The conflict between the employers and the Department of Fisheries representing the government is focused on the size of the quotas and fishing periods. Minor employers argue that they are not treated as partners by the government in the talks about future of the sector or that they do not know about the existence of the institution of SD as such. In face of the virtual extinction of deep sea fishing, the lack of integration of minor entrepreneurs and the rather negligible activity of trade unions, it is difficult to talk about an open conflict between the parties. However, the situation is visibly tense, even when it comes to negotiations.
At sector level, the obstacles that decrease the efficiency of the bipartite SD are: dependence of the trade unions on employers; low number of large plants that have active trade union organisations; lack of representative organisation of the employers; lack of knowledge about future of the sector. There is no promotion of the bipartite SD at the sector level.

b) At company level

Workers' and employers' organisations at this level are National Maritime Section NSZZ "Solidarność" and SFTUF. As there are no employers' organisations, the agreements are signed between trade unions and the following companies: "Dalmor" Joint-Stock Company Deep Sea Fishing, Processing and Trading Enterprise; PPi UR "Szkuner" - Fishery and Fishing Service

Enterprise; Koga enterprise –Hel. There is no obligation to participate in CB at sector level. No data on possible conflicts between players regarding recognition issues is available. There are seven collective agreements which are signed and remain in force for the moment, until May 2006. These concerned 1,805 people working in fishing. Four collective agreements relate to companies in a situation of bankruptcy. The three other collective agreements were concluded in companies Dalmor, PPiUR Szkuner and Koga. Signatory parties are: National Martitime Section NSZZ “Solidarność”; Seamen’s & Fishermen’s Trade Unions Federation; “Dalmor” Joint-Stock Company Deep Sea Fishing, Processing and Trading Enterprise; PPi UR “Szkuner” - Fishery and Fishing Service Enterprise; Koga enterprise –Hel. The agreements deal with wages, working conditions, food supplies, signing work contracts etc. They are signed every year or two, and then they are renegotiated. The number mentioned concerns people working in fishing. Coverage rate of the collective agreements signed in comparison with total number of companies is : 3 companies/1,206 = 0.25 %. There is no data on coverage rate of the collective agreements signed in comparison with total number of workers. There are procedures for extending collective agreements to parties that are not signatories to the agreement, which are used effectively. The agreements are renegotiated, to which both sides agree. In the case of two companies – “Dalmor” and “Szkuner” – the agreements were signed anew without any serious changes.

As far as the relationship between the sector and company levels is concerned, we observe that the links between trade unions and the employers constitute a major threat to proper functioning of the SD at company level that could undermine the social balance in the sector as such. The „Dalport” Trade Union is dependent on the plant where it carries out its activities to such extent that it, in fact, represents the interests of the employers, instead of the employees. On the one hand, it has to be said that the branch, represented by two huge companies and trade unions active on their territory is so hermetic, that all the partners are interconnected and interdependent; on the other hand it has to be noted that several hundred minor fishing companies have no contact with the trade unions and with the SD.

Comment

While many employees’ organisations were created in the fishing sector in Poland, up to now there are no employers’ organisations. The employers are rather unorganised, for example among the 1,500 ship-owners there are only a few associations, and the biggest of them consists of 200 people. The Trilateral Team for Sea Shipping and Sea Fishing represents mainly the interests of trade-ship-owners, but unfortunately not the interests of the fishermen, even those belonging to the trade unions. The dynamics of the changes in the sector - liquidating ships by scrapping them, liquidation of fisheries, the growing number of ships sailing under “flags of convenience”, the reluctance of the fishermen to provide anyone with data on their catch, lack of coherent politics of fishing on the part of the government, the unstable situation of both of the big companies and the attempts to put them into different sectors of the economy, all make it difficult to describe the fishing industry and its ability to change under the influence of a well-functioning SD. All sides of the SD agree that the Trilateral Team is too big, and so it is impossible for it to work out any solution for the fishing sector. This is even more difficult in the situation when the government is very inconsequential in its policies towards the fishing sector. There is also a visible lack of legal solutions, which would strengthen the position of the Team and make its decisions binding. The trade unions perceive certain changes as threats for its workers, and these are: changes in the work code; pensions for the disabled, the proposal for the fishermen to work until they are 65 years old or to retrain after the age of 50, the reduced period of protection before retirement, the black economy created by signing unprofitable agreements, failure to abide by the safety regulations on the ships. The main problem remains the lack of employment opportunities, so the trade unions are often treated as employment agencies. On the other hand, the employers point to the fact that the decreasing number of fish causes companies to scrap their ships. Everyone agrees that fishing is undergoing a deep crisis, or that it even ceased to exist when 30 % of the Polish fishing fleet was scrapped. There is no plan for reactivating this sector. The Department of Fisheries in the Ministry of Agriculture and Rural Development consults its projects with various groups of fishermen, also with small associations, as it acknowledges that the interests of the small fishermen may be very different from those of the big fishing companies.

PORTUGAL

1. Description of the sector at national level

1.1. Delimitation and scope of activities in the sector

From the statistical point of view, the definition of the Fishing industry Sector established by the National Statistics Institute (INE) corresponds to section 050 of the CAE[199] definition: Fishing, operation of fish hatcheries and fish farms and service activities incidental to fishing (05.01 – Fishing and service activities incidental to fishing: 05.01.1 – Sea fishing; 05.01.2 – Fishing in inland waters; 05.01.3 – Collecting seaweed and other sea and inland water products; 05.02 - Aquaculture).
The following activities are covered in the CB: industrial fishing and small scale or *artisanal* fishing (open sea fishing, trawling, long line fishing (hook), driftnet and long line fishing).

1.2. Socio-economic features of the sector

Fishing is an important economic activity, which in Portugal, makes a limited contribution to the country's GDP and to the Gross Value Added (GVA). The analysis of the sector's GVA in 2002 indicates 0.37% representation in the national GVA, which is a decline in terms of the sector's contribution at national level compared with 1995 when the GVA for fishing was about 0.5% of the national GVA.[200] Fishing, agriculture and forestry contributed 3.6% to the GDP in Portugal. The share of Portuguese catches have been declining for many years, as a result of the substantial reduction in long-haul fishing (particularly of cod) and declining fishing stocks in coastal waters. Currently, more than 80% of the fish caught come from national waters (154 thousand tons, 274 thousand euros, in 2003). In addition to the fish caught, Portugal's fish imports have been rising (particularly frozen fish) and have exceeded exports (both in volume and in value). This negative balance has tended to worsen. The negative balance in the commercial balance of fishing products reached nearly 656 million euros in 2004 in contrast to 30 million euros in 1985; the fish landed went from 250,000 tons in 1985 to 140,000 tons in 2004 with a value of 240 million euros[201]. No data are available on the estimated importance of the underground economy.

On the other hand, the Portuguese fishing fleet has gradually been getting smaller, both in terms of the number of vessels and in the gross registered tonnage and engine power; this trend is partly due to community requirements from the Common Fishing Policy which imply the permanent removal of many boats. Between 1985 and 2004, the Portuguese fleet went from about 18,000 boats to 10,089 which is a 44% reduction. Despite this reduction in the number of boats, more than half of the fleet has been in use for over 25 years; 8,739 of the boats registered in 2004 have a gross registered tonnage below 5 tons which is 87% of the total fleet[202]. Although controversial, this measure is considered necessary to improve conditions, stimulate the renewal of the boats and force an increase in productivity. Both in terms of the technological aspects in general and in relation to the boats, fishing gear, auxiliary means of navigation or means of detection, the conditions of the national fishing are adequate to catch the existing stocks. Its incompatibility is more connected to its technical-economic structure, its ability to adapt to the market conditions and to the demands of the market and to its almost total removal from the product valorisation processes and marketing.

Enterprises

Sub-sectors	Number of enterprises	% enterprises without employees	% enterprises with ‹10 employees	% enterprises 10-49 employees	% enterprises 50-249 employees	% enterprises with › 250 employees
0501	444	ND	74.5% (331/444)	23.2% (103/444)	2.1% (9/444)	0.2% (1/444)

Source: DGEEP, 2004.

199 Classification of Economic Activities.
200 Fisheries Statistics, INE and DGPA, 2003.
201 Data provided by the Trade Union Federation of the Fishing Sector.
202 Data provided by the Trade Union Federation of the Fishing Sector.

There was a downward trend in direct employment in the fishing industry sector between 1991 and 2001, which was the result of the restructuring that has been taking place in both the fleet and the industry. The number of registered fishermen declined from 41,000 in 1985 to 21,345 in 2004[203]. In 1991, employment in the sector was around 0.6% of the active population compared with 0.3% of the active population in 2001[204]. However, the percentage of people dependent on fishing activities is much higher as each job at sea generates a number of jobs on land, notably in the canning, freezing and fish meal industries, in commercialisation, transport, administration, research and training.

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country – all sectors- (%)	Number of employees in enterprises ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in enterprises 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in enterprises 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in enterprises ›250 workers in the sector/ number of employees in the sector (%)
0501	ND	4505	(0.2%) 4505/2.911.677	(25.5%) 1147/4505	(35.8%) 1613/4505	(25%) 1128/4505	(13.7%) 617/4505

Source: DGEEP, 2004.

According to the 2004 data on the age structure provided by DGEEP, 61% of the population whose main occupation was fishing were aged between 35 and 54 years, 18.3% between 25 and 34 years and just 7% between 16 and 24 years. In Portugal, the activities related to the fishing industry sector are not attractive to the younger populations, due mainly to the social representation linked to this kind of work, the working conditions and the toughness of work at sea, the unattractive remuneration system for fishermen, low salaries and the less favourable aspects of social protection and protection in unemployment situations; hence it is characterised as a sector with little renewal of human resources and therefore in need of skilled manpower for work on board. Only very recently did the regulatory Law of the legal system of the individual labour contract for work on board fishing vessels (industrial fishery) - Law no. 15/97, of 31 May - give workers the right to holidays, leave, Christmas bonus, minimum rest periods, insurance against death and permanent disability. An analysis of the salaried employees by gender confirms that male employment is higher than female employment in this sector (86.7%). The fishing sector is characterised by manpower with a low level of schooling, notably at the 1st cycle (55%) and 2nd cycle (16.9%) level of basic education. It should be noted that a considerable number of workers in this sector of activity – about 12.8%, have not completed any stage of basic education. Just as in qualification levels, women also have higher schooling levels than men: 15.9% of the women in the sector have a degree, a bachelor’s diploma or secondary education whereas only 4.7% of the men have these qualifications. Overall, the sector is characterised by a skilled workforce (85.5%), with a slightly higher percentage of women at this level (79.9%) than men (73.2%). About 7.1% of the sector’s employees are captains, supervisors and team leaders and 5.5% of the workers are semi-skilled. However, only 6.5% of employees hold a medium or higher qualification level. It should be noted that a larger percentage of women have higher qualification levels than men: 7.6% of women in this sector are senior and middle managers as opposed to just 6.3% of men. Although the labour force is characterised by low schooling and qualification levels – which is the rule in other sectors of the national economy – it does have a higher training level thanks to mandatory attendance of training for seafarers in order to obtain the necessary skills to carry out their work on board. Essentially, the training policy in the last decade has focused on the qualification of fishing professionals, particularly with regard to the catch, because the technological evolution of the vessels and the increasing need to sail greater distances has made it vital for workers to have training, which prepares them for the demands of their profession.

The importance of fishing is fundamentally due to the fact that fishing resources and products are essential to food supply and employment. In a country like Portugal, with an Exclusive Economic Zone of 1700 mil Km^2 and a continental coast of about 942 Km^2, fishing plays a significant role in the livelihoods of coastal populations and communities. Most of the companies in this sector of activity are located in the Algarve region (34.8%: INE; 23.4%: DGEEP), in the Centre region (22.2%: INE; 19.8%: DGEEP), in the North region (15.6%: INE; 26.1%: DGEEP) and in the region of the Azores (7.6%: INE; 22.1%: DGEEP). The number of workers in the companies in this sector is considerably higher in the Centre region (28%: INE; 38.7%: DGEEP), in the Algarve region (22.4%: INE; 18%: DGEEP) and in the north region of Portugal (18.9%: INE; 18.3%: DGEEP). Many of the work posts in the fishing industry sector are in traditional fishing communities

[203]Fisheries Statistics, INE and DGPA, 2004.
[204] Fisheries Statistics, INE and DGPA, 2003.

such as Peniche, Caxinas, Gafanhas, Fuzeta and others, which contribute to local development, to employment and to maintaining other economic activities (fish processing industry, supplying the market with products from this sector, ship building industry); the decline of fishing would imply the economic collapse of these communities that depend on fishing.

In the last three years, besides the problems of wholesale prices, the sector has had to deal with the constant rise in fuel prices which have increased about 60%. These situations have prompted a very difficult situation of pre-bankruptcy, and this has meant that there is increasing disparity between the fishermen's salaries and the salaries in other sectors; and in relation to the hard work and conditions they endure. In industrial fishery, the workers earn a small fixed amount, called fixed pay; most or even all the employees' earnings depend on the percentage or share of the vessel's total sales and therefore this situation is directly reflected in the salaries of the fishermen and other employees in fishing. The European Commission announced the European Fund for Fisheries (FEP), which has a total budget of roughly 3.8 million euros for a period of seven years. This fund, to be applied from 1 January 2007, was conceived as a response to the constraints felt in the sector and to assure the sustainability of the European sector of fisheries and aquaculture. The FEP will support the sector in adapting and modernising the fleet in order to make it more competitive and will promote measures aimed at protecting and improving the environment. It will also contribute to fishing communities most affected by the crisis diversifying their economic base. Financing will be available to all branches in the sector – sea fishing and inland fishing, aquaculture enterprises, producer organisations, the processing and commercialisation sector -, as well as to the fishing zones.

2. Description of the organisations active in the sector

2.1. Description of the workers' organisations active in the sector[205]

a) Federação dos Sindicatos do Sector da Pesca (Fpescas) –Trade Union Federation of the Fishing Industry Sector (Fpescas)
Founded on the 7th June 1981; it is financed by contributions from member Unions and sporadically from CGTP-IN solidarity. The member trade unions (all the fishermen unions and one representing land workers – unloading, sale of fish, administrative work) represent the workers from all segments (sub-sectors) of Portuguese fishing. It continues to be the only trade union structure dedicated exclusively to the fishing sector. At present, 9 trade unions are members covering all of the national territory. The Federation does not have any of its own salaried staff but is run by the workers of member trade unions and in particular those of the trade union in Lisbon, where the head office is located. The workers represented by the member trade unions are mainly the crews of fishing vessels (all categories) and the administrative staff of the fishing boat owner companies, workers in cod drying attached to ship owner enterprises and workers of all the categories of the two enterprises (Docapesca in mainland Portugal and Lotaçor in the Azores) responsible for the unloading and first sale of the catch. Although the Federation is a trade union organisation, most of its work consists of the analysis, discussion and negotiation of the conditions in which the fishing activity takes place, and not the usual and regular work of trade union organisations in general which is focussed on the working conditions in the respective sectors or enterprises and in particular the negotiation of collective labour agreements. As a result, rather than discussing and negotiating collective agreements, it is easier to find the Federation discussing, for example, questions on the mesh of the nets, the fishing areas and possibilities or questions under discussion at present that are essential for the industry's survival, namely those linked to the huge increase in fuel costs and the formation of the prices in the first sale.
The Federation is legally recognised and accepted as the special interlocutor to represent fishing workers both nationally and internationally. For the sector of Fishing, this organisation has the power to negotiate and to sign agreements at national, regional, sector and company levels. The Federation has the power to represent member trade unions in negotiating and signing collective agreements in accordance with the trade union legislation. The Federation is formally the signatory of just three collective agreements of national or regional scope (Docapesca, Trawling and, in the Algarve, Seine); the remaining agreements in the sector were signed directly by the trade unions although with the supervision and direction of the Federation. There are also some collective agreements signed by the Federation applicable to workers of some trawling enterprises that came about due to a conflict with the Employers' Association for trawling.
The Federation's national membership is CGTP-IN.

[205] Data provided by the organisations themselves unless otherwise indicated.

b) FESMAR – Federação de Sindicatos dos Trabalhadores do Mar – Trade Union Federation of Workers at Sea

Despite the efforts of the research team and insistence by letter, fax and telephone and the letters of recommendation from the European Commission and from IST, it proved impossible to obtain information about FESMAR, as there was response from its directors in time to prepare this report.

The only information available is that this organization is member of UGT at national level.

c) SINDEPESCAS - Sindicato Democrático das Pescas- Democratic Fishing Trade Union

SINDEPESCAS is a trade union organisation of national scope founded in 1889. Its statutes were changed in 1932 and 1974, and its name was changed in 1980 to its current one of SINDEPESCAS. The national sub-sectors covered are the commercialisation of preserved fish, cod drying, fish processing and the wholesale fish markets and the fishermen. It is financed entirely by members' fees. The trade union has four salaried staff. It represents skilled and unskilled workers.

SINDEPESCAS has legal and reciprocal recognition. For the sector of Fishing, this organization has the power to negotiate and to sign agreements at national, regional and sector levels. It takes part in CB for the sector, can make demands and has the power to negotiate and sign collective labour agreements for the whole fishing sector and its sub-sectors as well as to participate in formal consultations. This trade union organisation has already signed six collective labour agreements, which are mainly revised annually. The aforementioned agreements cover workers from fish processing, commercialisation, preservation, wholesale fish markets and open sea and coastal fishing. It negotiates the CLC of the fish trade with ACOPE and others (FETESE, STVSIH, SITRA, SITESC).

SINDEPECAS is a member of UGT at national level.

d) SOEMMM - Sindicato dos Oficiais e Engenheiros Maquinistas da Marinha Mercante – Trade Union of Officers and Engineers of the Merchant Navy

SOEMMM was formed in 1911 and resulted from *Sindicato dos Oficiais Maquinistas da Marinha Mercante*, - Trade union of Merchant navy Engineer officers – the former association for the class of engineer officers of the Merchant navy. It represents the Engineer Officers of the Merchant Navy (Including the Trade Fleet and the Fishing Fleet). All members started out professionally at sea (trade and fishing seamen), but today the large majority work on land in the various sectors and enterprises. The trade union is financed exclusively by its members' fees, which are 1% of gross monthly earnings over just 12 months. It has 3 administrative staff.

SOEMMM has legal and reciprocal recognition. For the sector of Fishing, this organisation has the power to negotiate and to sign agreements at national, regional and sector levels. It takes part in CB for the sector, has the power to negotiate and sign collective labour agreements. The CB is normally done with the Ship owner Associations and not with the enterprises. This trade union has never signed collective agreements with the fishing enterprises. On land, there are many Enterprise Agreements. It negotiated the CLC for trawling with ADAPI, UGT/Fisheries and others (publication BTE, 1st series, no. 10, of 15/03/1990) and the CLC for net and long line fishing with the ADAPLA (publication BTE, 1st series, no. 17, of 8/05/1990. These contracts were negotiated from scratch by this trade union because the sector had no contract; they were updated until SOEMMM started being covered by an Extension Decree following a difference between the trade unions.

In terms of trade union alignment, relative to the central trade unions, SOEMMM has been a member of UGT since 1992.

e) UGT/Pescas - Sindicato Nacional dos Trabalhadores do Sector das Pescas– National Trade Union of Workers from the Fishing Industry Sector – UGT/Fisheries

Despite the efforts of the research team and insistence by letter, fax and telephone and the letters of recommendation from the European Commission and from ISST, it proved impossible to obtain information about SINDEQ, as there was response from its directors in time to prepare this report.

The only information available is that this organisation is member of UGT at national level.

f) SEMM -Sindicato dos Engenheiros da Marinha Mercante– Trade Union of Merchant Navy Engineers

The SEMM is affiliated and represented by FESMAR, as well as SINCOMAR, SITEMAQ and SMMCMM. No more data are available[206].

[206] This organisation did not answer to the inquiry, letters, faxes and phone calls of the national team research.

g) FSM – Federação dos Sindicatos do Mar – Seafarers' Trade Union Federation

The FSM affiliated the following trade unions:

- Sindicato dos Capitães, Oficiais Pilotos, Comissários e Engenheiros da Marinha Mercante (OFICIAISMAR) - Trade Union of Captains, Pilot Officers, Pursers and Engineers of the Merchant Navy in 1976;
- Sindicato dos Trabalhadores da Marinha Mercante, Agências de Viagens, Transitários e Pesca (SIMAMEVIP) – Trade Union of Workers of the Merchant Navy, Travel Agencies, Fowarders and Fishing in 1976;
- and Sindicato dos Transportes Fluviais, Costeiros e da Marinha Mercante – Trade Union of Fluvial and Coastal Transports and of the Merchant Navy in 1990.

The FSM affiliated these trade unions in order to avoid division amongst the unions. The FSM is financed exclusively by members' subscriptions and does not have any full time employees. The trade unions that form the FSM provide the personnel necessary for it to perform its functions (trade union leaders and workers). The FSM represents senior management (Officers of the Merchant Navy Rating) and land workers, they are all skilled workers. Sub-sectors covered by the organisation are the following: Captains, Pilot Officers, Pursers, Engineers of the Merchant Navy; Merchant Navy, Travel Agencies, Fowarders and Fishing; Fluvial and Coastal Transports and of the Merchant Navy.

The FSM is legally and institutionally recognised. It develops CB with the deep-sea fishing shipowners, mainly established in the Port of Aveiro. These companies use Officers of the Merchant Navy - Commanders, Pilots and Radio Technicians, i.e. its members. The FSM takes part in the CB for the sector. There are difficulties in signing CAs, at present, due to the shipowner's blockade. It participates in meetings with the enterprises and the public Administration in Portugal. It also participates in international forums in conjunction with the ETF, where it is affiliated. Nevertheless, the FSM does not negotiate or have the power to sign any CAs at sector level for the fishing sector, but SIMAMEVIP, which belongs to FSM does negotiate CAs. At company level, for the sector of Fishing Industry, the FSM does not have the power to negotiate or to sign collective agreements. In the fishing industry, only SIMAMEVIP has this power.

FSM is a member of CGTP-IN at national level.

Trade Unions

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector Fishing Industry			European affiliations	Other affiliations
Trade Union Federation of the Fishing Industry Sector (Fpescas)	ND	ND	ND	Yes	ETF*	ND
Trade Union Federation of Workers at Sea (FESMAR)	ND	ND	ND	Yes	ETF[207]	ITF
Democratic Fishing Trade Union (SINDEPESCAS)	4,350	4,350	96,5% (DGEEP); 10% (trade union estimate)	Yes	ETF	ITF IUF
Trade Union of Officers and Engineers of the Merchant Navy (SOEMMM)	1,100	60	1,3% (DGEEP)	Yes	ETF	ITF
National Trade Union of Workers from the Fishing Industry Sector (UGT/Fisheries)	ND	ND	ND	ND	ND	ND
Marine Engineers Trade Union (SEMM)	ND	ND	ND	ND	-[208]	ITF
Seafarers' Trade Union Federation (FSM)	4,063 = 500 (OFICIAISMAR)+2,463 (SIMAMEVIP)+1,100 (Trade Union of Fluvial and Coastal Transports and of the Merchant Navy)	472: 20% (OFICIAISMAR); 12% (SIMAMEVIP); 7% (Trade Union of Fluvial and Coastal Transports and of the Merchant Navy)	10,5% (DGEEP)	No	ETF	ITF

Source: Trade Union Federation of the Fishing Industry Sector, FESMAR, SINDEPESCAS, SOEMMM, UGT/Fisheries, SEMM, FSM (2006).
* The Trade Union Federation of the Fishing Industry Sector (Fpescas)" is associated to ETF through FSM.

2.2. Description of the employers' organisation active in the sector[209]

ADAPI – Associação dos Armadores das Pescas Industriais – Association of industrial fishing ship owners
National Association founded in 1974 which represents the industrial fisheries segment: open sea fishing and trawling. It is the most representative Shipowners Association nationally and also enjoys growing legal and reciprocal recognition among community organisations for the constructive role it tries to play and its regular presence when matters relevant to fishing as a whole are discussed. At present, 38 enterprises are members of ADAPI, which have 80 ships, 23 of which are open sea fishing boats and 57 are trawlers; all are large ships, that is, they are more than 24

[207] The ETF claims that the European affiliation for the "Trade Union Federation of Workers at Sea (FESMAR)" is unknown. Further to this comment and after verification, the author of the Portuguese report maintains that FESMAR is affiliated to ETF.
[208] The ETF claims that SEMM is affiliated to its organisation. Further to this comment and after verification, the author of the Portuguese report maintains that SEMM is not affiliated to ETF.
[209] Data provided by the organisations themselves unless otherwise indicated.

metres long (between 24 and 80 metres). The association provides institutional guidance to member enterprises and provides them with information on the regulations for the activity and the defence of common interests. It has a staff of 3 full time employees.
The ADAP has published statutes and its main source of income is the fees of member enterprises. For the sector of Fishing, this organisation has the power to negotiate and to sign agreements at national, regional and sector levels. It joins the CB for the sector and has the power to negotiate and sign the collective work agreements. It is the only ship-owners association involved in the negotiation of collective regulatory instruments. It negotiates the CLC for open sea fishing with the UGT/Fisheries and other, the CLC for trawling with CGTP-IN, the CLC for trawling with the UGT/Fisheries and other, the CLC for floating long line fishing with the UGT/Fisheries and others and the CLC of open sea trawling (shell fish) with the UGT/Fisheries and other. Both nationally and at community level, ADAPI is represented in various executive committees of the Advisory Councils. It is represented nationally in the National Council of Fisheries and Aquaculture, in Obsermar – Observatory of Training and Employment for the Sea, in the Monitoring Committee of the Fisheries Operational Programme, in the General Council of IFADAP, in the Advisory Council of the Portuguese Agency for Food Quality and Safety and in the Salary Compensation Fund for Fishing Professionals. In the case of the Community Advisory Councils, it is represented in the Regional Advisory Council of the South Western Waters and in the Regional Advisory Council of the extra- community Waters. These advisory councils have been set up recently by the European Commission for the fisheries sector and are organised according to geographical intervention areas.
It has no national, European or international memberships.

Employers' organisation

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
Association of industrial fishing ship owners (ADAPI)	80	Around 1,000 crew at sea, plus the workers on land who provide support to seafaring activities.	21.1% (DGEEP)	Yes	-	-

Source: ADAPI (2006).

3. Description of the SD in the sector

3.1. Description of the tripartite SD in the sector

In Portugal, there is no tripartite SD as such. However, there are other forms of consultation or meetings between the government and the trade union organisations and the employer organisations which are considered positive but without any effect on the agreements signed. There are sometimes regular meetings with the government at the request of the trade unions or the employers' associations in response to specific questions related to the companies or the sector of activity. The Trade Union Federation for the Fishing Industry Sector participates actively in the discussions/negotiations of the political and economic conditions in which the activity is conducted in Portugal; in the opinion of its directors it obviously influences the working conditions in the fishing sector. On the other hand, SINDEPESCAS informed us that no meetings of any kind are held between the government, trade union organisations and the sector's employers' associations and that the meetings that are held with members of the government are always at the initiative and under pressure from the trade union and employers' organisations. This trade union considers that the results of these meetings are usually difficult or impossible to see and to date, no agreement has been signed. In the specific case of this sector of activity, there is an authority called the Advisory Council for Fisheries for dialogue and participation in the regulation and collective organisation for the sector's protection.

3.2. Description of the bipartite SD in the sector

CB in the fishing sector takes place only at sector level. Collective agreements do not apply to the vast majority of workers, enterprises and segments of the fleet (principally in the so-called multi purpose vessels, commonly called small-scale or *artisan* fishing, which corresponds to the majority of the Portuguese fleet). The reasons for the absence of collective agreements certainly vary. They relate, on the one hand, to the size of the vessels and the kind of working relations between the crews (small vessels, linked to traditional, so called artisan activity, frequently part of a family economy or one with very close relations) and on the other hand to the fact that salaries are calculated according to the catch (percentage of the sale value or calculated using a "share" system of the sale value, in both cases after deducting some of the costs for the use of the vessels). Whereas the regulation of the working conditions in industrial fishing tends to approach the conditions of the remaining sectors of activity, the small-scale – artisan – fishing continues to have some specificities which hinder the introduction of social innovations: the form of payment with a strong component directly depending on the amount of production and commercialisation, with risks shared between worker and employer, is basic to the definition of the working relationship.

a) At sector level

The sector's social partners are: ADAPI, UGT/Fisheries, Trade Union Federation of the Fishing Industry Sector, SITEMAQ, SEMM, SINCOMAR, SINDEPESCAS, SOEMMM. There are no social partners who, though not recognised by the main partners or by the public authorities, should be considered as playing a role in the sector's professional relations. Generally speaking, there are no conflicts in this sector between the parties related to recognition problems. However, it should be mentioned that whenever there are unions with the same scope, problems tend to arise between them regarding their representativeness. The requirement to participate in CB at sector level is determined by the Constitution of the Republic which gives parties the right to negotiation, regulated by the Labour Code. However, it is normally the trade union organisations that take the initiative to revise and update the collective labour agreements.
The Fisheries sector essentially uses a bipartite model of SD, through the negotiation of the Collective Labour Contracts (CLC):

- CLC of open sea fishing between ADAPI, UGT/Fisheries and others (SITEMAQ, SEMM and SINCOMAR): publication BTE, 1st series, no. 10, of 15/03/1990; latest alterations BTE, 1st series, no. 5, of 8/02/2002;
- CLC of trawling between ADAPI and the Trade Union Federation of the Fishing Industry Sector, representing the Trade Union of the Fishing Workers of the North, Trade Union of Fishing Workers of the Centre, Free Trade Union of Fishermen and Similar Professions and Trade Union of Fishing Workers of the South (latest alterations BTE, 1st series, no. 15, of 22/04/2000);
- CLC of coastal trawling between ADAPI, UGT/Fisheries and other (SITEMAQ): latest alterations BTE, 1st series, no. 15, of 22/04/2000;
- CLC of floating line fishing between ADAPI and UGT/Fisheries and other (SITEMAQ): publication BTE, 1st series, no. 8, of 28/02/1998; latest alterations BTE, 1st series, no. 24, of 29/06/2001;
- CLC of open sea trawling (shell fish) between ADAPI and UGT/Fisheries and other (SITEMAQ): publication BTE, 1st series, no. 20, of 29/05/1988; latest alterations BTE, 1st series, no. 24, of 29/06/2001.
- CLC of open sea trawling between ADAPI and SIMAMEVIP: publication BTE, 1st series, no. 2, of 15/01/2000;
- CLC of open sea trawling between ADAPI and SIMAMEVIP: publication BTE, 1st series, no. 25, of 8/07/1984.

The main intervention areas of the collective contract are: rights and duties of the parties, working timetables, holidays, minimum wages, the awarding of subsidies, safety, hygiene and health in the workplace and the framework of professional categories in the remuneration levels. The sector's CLCs directly cover all unionised workers and member enterprises in signatory employer associations; they also cover the remaining workers and enterprises in the sector through the extension regulations (administrative procedure in accordance with the current legislation) as a means of clarifying the sector's working conditions. The CLCs therefore have a 100% coverage rate. The extension regulations are foreseen in the Law and are put into action by the Ministry of Labour following consultation with the interested parties.
According to SINDEPESCAS, the position of the social partners towards future developments of SD in this sector is relatively reticent and not very encouraging as a result of the business culture of the employers. In contrast, according to the ship owner association (ADAPI), at the moment there is a certain amount of peace making between the parties as a result of the unfavourable socio-economic environment facing the fishing industry, with the constant decline in the fleet and the ongoing rise in fuel costs. There is no data on the duration of the collective agreements signed and which remain in force for the moment.

b) At enterprise level

Normally the CB is done with the Ship owner Associations and not with the fishing enterprises. On land, there are enterprise agreements. There is no data on the collective agreements signed and which remain in force for the moment (number, content, duration, type and share of companies and workers covered, procedures of extension) and on the players' positions with regard to future developments in the SD at company level in the sector of Fishing Industry.

There are no data on the existence of links between the sector and company levels.

Comment

The main threats, opportunities, strengths and weaknesses of the Fishing Industry sector identified in the Study on European Strategy of Fishery socio-economic diversification are as follows:

- Threats: decline of the fishing sector and decline of the profitability of the fishing industries in recent years; excessive dependence of the fishing sector on the local economies of some municipalities; decline of fishing resources; inadequate training of fishing professional; pressure from other sectors (essentially tourism) on fishing infrastructures; young people show little interest in working in the fishing industry.
- Opportunities: uniqueness of some resources/facilities related with the fishing sector which could have attractive tourist possibilities; incorporation of technology in many of the fishing units; sustainable growth of the sector in recent years.
- Weaknesses: age group of fisherman very old; inadequate training of fishing professionals; lack of collective equipment in small fishing ports; poor infrastructures supporting traditional fishing activity.
- Strengths: large variety of species; high quality of raw material; there is a Training Centre (Forpescas), which enables ongoing training plans for professionals to be made; good weather conditions to harbour boats; fishing sector is an engine of local development; legislation exists which protects resources; there is supervision; reasonable infrastructures for unloading and dispatching catch; strategic plan for on-going training; much association activity in the fishing sector.

The fishing sector, being a strategic sector for the national economy, should receive stronger government assistance for the promotion of CB, to translate into national law all the the international norms with regard to on board working conditions, resting schedules, ship capacities, security and the safeguarding of human life at sea, professional training and certification of the workers, in order to stimulate this essential sector in supplying an essential product for the feeding and welfare of the population.

Appendix: List of organisations

ACOPE – Associação dos Comerciantes de Pescado – Association of Fish Dealers
ADAPI – Associação dos Armadores das Pescas Industriais – Association of industrial fishing ship owners
CGTP-IN – Confederação Geral dos Trabalhadores Portugueses/Intersindical Nacional – General Confederation of Portuguese Workers /National Inter-Trade Union
DGEEP/MTSS – Direcção-Geral de Estudos, Estatística e Planeamento, Ministério do Trabalho e da Solidariedade Social - General Directorate of Studies, Statistics and Planning of the Ministry of Labour and Social Solidarity
DGPA – Direcção-Geral das Pescas e Aquicultura - General Direction of Fisheries and Aquaculture
FESMAR – Federação de Sindicatos dos Trabalhadores do Mar – Trade Union Federation of Workers at Sea
FETESE- Federação dos Sindicatos dos Trabalhadores de Serviços - Trade Union Federation of Service Workers
Fpescas - Federação dos Sindicatos do Sector da Pesca –Trade Union Federation of the Fishing Industry Sector
FSM – Federação dos Sindicatos do Mar – Seafarers' Trade Union Federation
IFADAP - Instituto de Financiamento e Apoio ao Desenvolvimento da Agricultura e Pescas – Financing and Support Institute for the Development of Agriculture and Fishing

OFICIAISMAR - Sindicato dos Capitães, Oficiais Pilotos, Comissários e Engenheiros da Marinha Mercante - Trade Union of Captains, Pilot Officers, Pursers and Engineers of the Merchant Navy;
SEMM - *Sindicato dos Engenheiros da Marinha Mercante* – Trade Union of Merchant Navy Engineers
SIMAMEVIP - Sindicato dos Trabalhadores da Marinha Mercante, Agências de Viagens, Transitários e Pesca - Trade Union of Workers of the Merchant Navy, Travel Agencies, Fowarders and Fishing;
SINCOMAR – Sindicato de Capitães e Oficiais da Marinha Mercante - Trade Union of Merchant Navy Captains and Officers
SINDEPESCAS - Sindicato Democrático das Pescas- Democratic Fishing Trade Union
SITEMAQ – Sindicato da Mestrança e Marinhagem da Marinha Mercante, Energia e Fogueiros de Terra – Trade Union of Merchant Navy Rating, Energy and Stokers
SITESC – Sindicato dos Trabalhadores de Escritório, Serviços e Comércio – Trade Union of Office, Service and Commerce Workers
SITRA – Sindicato dos Trabalhadores Rodoviários e Afins - Trade Union of Transport and similar workers
SMMCMM – Sindicato da Mestrança e Marinhagem de Câmaras da Marinha Mercante – Trade Union of Chambers of Merchant Navy Rating
SOEMMM - Sindicato dos Oficiais e Engenheiros Maquinistas da Marinha Mercante – Trade Union of Officers and Engineers of the Merchant Navy
STFCMM - Sindicato dos Transportes Fluviais, Costeiros e da Marinha Mercante – Trade Union of Fluvial and Coastal Transports and of the Merchant Navy.
STVSIH – Sindicato dos Técnicos de Vendas do Sul e Ilhas – Trade Union for Sales persons in the South and the Islands
UGT – União Geral de Trabalhadores – General Workers Union
UGT/Pescas - Sindicato Nacional dos Trabalhadores do Sector das Pescas– National Trade Union of Workers from the Fishing Industry Sector – UGT/Fisheries

SLOVAK REPUBLIC[210]

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

If we refer to the NACE code, the sector corresponds to NACE categorisation (NACE 05). However, even if the employers' activities correspond with the NACE categorisation, the representation of the workers is performed by a section of the Agriculture trade union.

1.2. Socio-economic features of the sector

Fishing in Slovakia goes back to the 13th century with the first pond being built up in the 16th century. Nowadays Fisheries are organised along the guidelines and directives of the European Union. The Fishing Industry in the Slovak Republic covers exclusively fresh water fishes NACE 05.00.0.

GDP share is not statistically significant and therefore not recorded. There is no underground economy present in the sector. There are 481 ponds plus 6 other water areas used for aquaculture in Slovakia. The average volume of fresh-water fish processed in Slovakia accounts for approximately 500 tons per year².

The sector structure consists of 6 SMEs. All fishing industry companies have been privatised and there are only SMEs. Geographical spread is evenly balancedthroughout the territory. There are no changes in the size of companies. The Fishing industry has been stable in the recent years.

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Total of the sector	6	ND	ND	ND	ND	ND

Source: Slovak Association of Fishermen

The number of employees accounted for 185 (males) and 46 (females)[211] in 2004 out of which 128 and 23 respectively were blue-collars. In addition there were 28 craftsmen active in the field. 27 workers worked under seasonal and 502 under fixed-term contracts in the same year. Unfortunately, there is no data on the qualification level and wages of the workers.

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	28	231[212]	0.0087 %	ND	ND	ND	ND

Source: Statistical Yearbook of the Slovak Republic 2004.

[210] The Fishing Industry is part of the Sector of Agriculture in Slovakia and it is difficult to collect the data related exclusively to it.
[211] Data provided by Mr Regenda, Ministry of Agriculture of the Slovak Republic. Data as of the year 2004.
[212] Full-time employees in the sector (do not include fixed-term and seasonal employees)

2. Description of the organisations active in the sector at national level[213]

2.1. Description of the workers' organisations active in the sector

As there is no direct involvement in sector bargaining in the fishing industry, we will briefly present an enterprise trade union unit operating within the context of the Slovak Union of Fishermen-Council in Zilina. Note that this unit functions only as the sole representative of the Council's employees to its management.

Workers' organisation

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Trade Union Unit of the Slovak Association of Fishermen	60 (of which 2 pensioners)	58	0.002 %	No	-	-

Source: Trade Union Unit of the Slovak Association of Fishermen, *(February, 2006)*; Statistical Yearbook of the Slovak Republic 2004

2.2. Description of the employers' organisations active in the sector

The Slovak Fishermen's Association (*Slovensky rybarsky zvaz*) was established in 1990 as an association of citizens registered at the Ministry of the Interior of the Slovak Republic. It employs 58 full-timers. All the employers (i.e. 6 companies) are members of it. The association is registered as an association of citizens interested in development and implementation of sports fishing at the Ministry of the Interior of the Slovak Republic. Funding of the Association is based on membership subscriptions. The membership is individual and no categorisation by the types of workers, age and qualification levels or gender is recorded. The membership of local organisations of the association consists exclusively of sports fishermen as individuals and thus no social partnership is applicable here.

As mentioned above, the Council of the Association in Zilina has concluded one enterprise collective agreement covering the following: definition of the relationship between the social partners; definition of employee relations; working hours (shifts), breaks, overtime, holidays, termination of employment and redundancy pay; pay; social fund, its generation; meals; health and safety. This collective agreement covers only the 58 mentioned employees.

Employers' organisation

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
The Slovak Fishermen's Association	6	259	ND	No	-	-

Source: Slovak Fishermen's Association, *(February, 2006)*; Statistical Yearbook of the Slovak Republic 2004

[213] As there is no direct CB at sector level and in company level in the fishing industry in Slovakia, all organisations taking part in CB that are relevant for the sector are presented in the report.

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

There is no tripartite social concertation specifically for the sector of Fishing Industry, or for the Agriculture sector. There are no other kinds of consultation or meetings between the government and the organisations specifically for the sector of Fishing Industry.

3.2. Description of the bipartite SD in the sector

There is no direct involvement in sector bargaining in the fishing industry. This is due to the low number of fishermen members and their professional status. However, as the Fishing Industry is included within the Agriculture Sector and as the workers and employers belonging to the fishing sector are covered by the collective agreements of the agriculture sector, sector CB for the sector of agriculture will be explained.

a) At sector level

There is no CB at sector level for the Fishing Industry. Currently, the climate for efficient SD is absent in the sector. The reason is that new private companies are not interested in SD. There is no obligation to participate in CB at sector level and participation is voluntary, even if usually – if the SD is well-established – participation is expected. As far as the players' position with regard to future developments in the SD at sector level in the sector of Fishing Industry is concerned, there is no intention to create a separate fishing industry.

In the Agriculture Sector, the cooperatives, farms and craftsmen operate in small numbers (3-4 people) and therefore they are represented only at sector level. The Trade Union of the Workers in Agriculture of Slovakia and the Association of the Employers in Agriculture of the Slovak Republic yearly conclude 2 sector collective agreements as follows:

- 1 sector collective agreement for the sphere of production;
- 1 sector collective agreement for the non-production sphere comprising research and secondary vocational schools.

Both sector collective agreements cover : identification and definition of the relationship between the social partners (Trade Union of the Workers in Agriculture on the one hand and the Association of the Employers in Agriculture on the other); grievance settlement; working hours; employment; health and Safety; remuneration; redundancy pay; welfare. All employees of the represented companies are covered by these collective agreements. In total, this represents 36 companies and 2,570 employees. Under paragraph 7 of the Act on CB, the Ministry of Labour, Social Affairs and Family of the Slovak Republic (MPSVaR) can declare a higher-level collective agreement as binding also for the employers who are not members of the employers' organisation which concluded the agreement in question. Based on the above mentioned legal provision, the coverage of collective agreements can be extended only upon the employers who operate in the similar field of business under similar economic and social conditions, whose headquarters are located on the territory of the Slovak Republic, and no higher-level collective agreement covers them. The motion to extend the coverage of a collective agreement can be submitted to the Ministry of Labour, Social Affairs and Family (MPSVaR) a minimum 6 months before the valididty of the current collective agreement terminates. Currently, there is no will, on the part of the Ministry, to implement the extension.

SD is promoted by the parties concerned (at bipartite level they are employees and trade unions). In the agriculture sector, there is an obligation to participate in CB at sector level, based on the Act on Collective Agreement No 2/1991 Coll. of Laws and its amendments. There are no conflicts between players regarding recognition issues. There are no players who, although not recognised (or only partially recognised) by the dominant players or by public authorities, must be regarded as playing a role in industrial relations in the sector.

b) At company level

There is no CB at company level for the Fishing Industry.

In the Agriculture Sector at enterprise level, there are approximately 50 collective agreements concluded in schools, research institutes etc. yearly[214]. Approximately one third of all the enterprises in the sector conclude enterprise collective agreement, others refuse to do so. The effective enterprise collective agreement was concluded on 1 April 2004 and is in effect until 31 March 2007. It is binding for the following employers' organisations:

- Slovak Fishermen's Association – Council (Slovensky rybarsky zvaz – Rada) and
- Trade Union Unit of the Slovak Fishermen's Association– Council Zilina (Odborova organizacia pri Slovenskom rybarskom zvave-Rada Zilina).

Content of the collective agreement consists of the definition of the relationship between the social partners, the definition of employee relations of working hours (shifts), breaks, overtime, holidays, termination of employment and redundancy pay, pay, social fund, its generation, meals, health and safety. The enterprise collective agreement covers the members (58 employees) of the Slovak Fishermen's Association– Council in Zilina. The share of employees in the sector covered by a company collective agreement is 25.1%. Procedures for extending collective agreements to parties that are not signatories to the agreement are the same as the extension presented at the sector level. There is no obligation to participate at CB at company level; participation is voluntary, but common if there is a trade union organisation present. There are no conflicts between players regarding recognition issues. Promotion of the bipartite SD at this level stems from the legislation (see above).

Collective agreements which remain in force for the moment have been signed by private SMEs. All types of employees (e.g. craftsmen, full-time worker, part-time workers, seasonal workers etc.) are covered by these collective agreements. Private share of employees in the sector covered by a company collective agreement is 4.8% (2,570 employees to 53,000 in total). There are no unrecognised players present in SD in agriculture.

Comment

The SD in the fishing industry in Slovakia is part of the SD in agriculture as such. The small companies and numbers of the self-employed in fishing do not allow for wider introduction of SD.

Annex: List of organisations

Konfederacia odborovych zvazov Slovenskej republiky (KOZ SR)	Confederation of Trade Unions of the Slovak Republic
Asociacia zamestnavatelskych zvazov a zdruzeni Slovenskej republiky (AZZaZ SR)	Federation of the Employers' Associations of the Slovak Republic
Republikova unia zamestnavatelov (RUZ)	Republic Union of Employers
Odborový zvaz pracovníkov poľnohospodárstva na Slovensku	Trade Union of the Workers in Agriculture of Slovakia
Poľnohospodársky zamestnavatelsky zvaz Slovenskej republiky	Association of the Employers in Agriculture of the Slovak Republic
Slovensky rybarsky zvaz	Slovak Fishermen's Association
Slovensky rybarsky zvaz – Rada v Ziline	Slovak Union of Fishermen – Council in Zilina

[214] There is almost no CB at company level in agriculture. Sector (bipartite level) collective agreements are used as binding documents by the signatories.

SLOVENIA

1. Description of the sector's characteristics at national level

1.1. <u>Delimitation and scope of activities in the sector</u>

In Slovenia the sector B 05.0 includes only the activities of fishing (05.010) and fish farming (05.020), while the classification is consistent with the NACE classification, as well as the classification of the Statistical Office of the Republic of Slovenia. From the point of view of employers' organisations as well as workers' organisations activities in the sector includes (beside B05.0) the following sectors: A 01.1, 01.2, 01.3, 01.4; DA 15,16 (correspond to NACE classification).

In Slovenia there is no special collective agreement concluded for the fishing sector (05.010), but the sector is incorporated in a broader collective agreement that covers the sectors A 01.1, 01.2, 01.3, 01.4; B 05.0; DA 15, 16.

1.2. <u>Socio-economic features of the sector</u>

The size and significance of the fishing sector in the whole economy is hard to assess, since according to the opinion of all the interlocutors fishing is a very small and unimportant sector. Fishing industry (05.0) represents 0.014 % of GDP and 0.016 % in added value (Source: Institute for Macroeconomic Analysis and Development; Ekonomsko ogledalo, 2/2006). It is equally hard to assess the fishing sector with regards to added value. The fishing sector represents 0.005 % of employees in Slovenia. When it comes to the grey economy in fishing, the interlocutors agree that there are no estimates on this.

The fishing sector (05.010) in Slovenia is characterised by the fact there are no multinationals involved, all together there is only 99 companies, of which all of them are small, with a total number of employees in all of the registered companies amounting to 41. Altogether there are only 7 companies that employ workers (maximum number of employees in a company is 29), while other companies (92) have the status of entrepreneurs, while these individuals can perform the fishing activities as complementing operations. All companies are private, while all the fishing is concentrated in the coastal region on the Adriatic Sea (Primorska). The fishing employees are mainly blue collar workers, the representatives of the Trade Union of Agricultural and Food Industry of Slovenia and the Food Industry Association have estimated however, that white collars workers very often go on board to fish (and thus become blue collars). In the studied sector we find low levels of education, mostly we can talk about experienced workers; moreover, workers are almost exclusively men. The average wages in the fishing sector for blue collars amount to 773 EUR (the wages are just below the average in comparison to other sectors, which are covered by the same collective agreement), whilst for the very small amount of white collar workers it amounts to 2.339 EUR. Data for 2004 (data are collected and processed considering international classifications – ILO and FAO) shows that full-time and part-time work is very similarly divided (app. 50 % : 50 %) (Source: Statistical Information, 100/2005).

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Sub-sector 05.010	99	92.9	6.0	1.1	0	0
Sub-sector 05.020	ND	ND	ND	ND	ND	ND
Total of the sector	ND	ND	ND	ND	ND	ND

Source: Chamber of Commerce and Industry; 24.2. 2006

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of Employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Sub-sector 05.010	92*	41	0.005	29.3	70.7	0	0
Sub-sector 05.020	ND	ND	ND	ND	ND	ND	ND
Total of the sector	ND	ND	ND	ND	ND	ND	ND

* Number of companies without employees. It is not possible to get reliable data on the number of self-employed workers since companies without employees can only carry out fishing activities as a supplementary activity.
Source: Chamber of Commerce and Industry; 24.2. 2006; Statistične informacije (Statistični urad Republike Slovenije), št. 5, 15.2. 2006

The interlocutors were not exactly optimistic about the future development of the fishing sector, for it has been in decline ever since 1991; therefore they are hoping that fishing in Slovenia would at least maintain the current level. In this respect all of the interlocutors exposed the limited fishing area and inability of fishing in high seas (due to the non-existence of a serious fishing fleet) as the main problem of the fishing sector. Furthermore, the representative of the Food Industry Association mentioned another problem, that of staffing, since there are very few people willing to work as fishermen.

2. Description of the organisations active in the sector at national level

The organisations are legally recognised as being representative in the sector of agriculture and food. As such they are legally partners as well as partners on the basis of reciprocity (only partners recognised as representative unions and on the basis of reciprocity from other partners can take part in negotiations in order to conclude collective agreement).

2.1. Description of the workers' organisations active in the sector

a) TRADE UNION OF AGRICULTURE AND FOOD INDUSTRY OF SLOVENIA / SINDIKAT KMETIJSTVA IN ŽIVILSKE INDUSTRIJE (KŽI)

This trade union already existed and was in operation under the Yugoslav state. Following the transformation of that state, a re-affiliation and re-registration of its members took place in 1990. Amongst its members the trade union has workers from sectors A and DA as well as B (only from fish farming). Thus, we can ascertain that workers from the sector in question, fisheries, are not among its members, therefore the density of members with regard to all employees in the fishing sector is 0 %. The trade union is financed on the basis of membership subscriptions from all its nearly 13,000 members, which are mainly blue collar workers.. The trade union employs two people.

The trade union participates in the negotiations for a collective agreement at sector level. This contract, apart from fishing, also covers sectors A and DA. The union is also a signatory of collective agreements. Up to now, it has signed all of them (i.e. 3 collective agreements+ their annexes, in the years 1991, 1995 and 2001) as well as all of their annexes. Furthermore, the trade union occasionally participates in negotiations at company level (in enterprises from sectors A and DA) – when one of their trade unions needs help within an undertaking. The branch of the trade union which operates in the company has the power to sign collective agreements at company level but national organisations of the trade union sometimes try to help their trade unions in the negotiations at company level. No collective agreements at this level have been signed by the organisation yet. Since, in their opinion, there had been no tripartite concertation in the fisheries sector, the trade union had not signed any contract up to now.

At national level, the trade union is a member of the Association of Free Trade Unions of Slovenia.

b) TRADE UNION OF AGRI-FOODSTUFFS OF SLOVENIA / SINDIKAT AGROŽIVILSTVA SLOVENIJE

The trade union was established in 1990, first at regional level and later on, with the merger of certain trade unions from other parts of the country, it transformed itself into the Trade Union of Agri-Foodstuffs of Slovenia; it is financed only with the help of membership subscriptions and they have no employees. Among its members are workers from sectors A, DA and B. Altogether, the trade union has 1200 members (75 % of which are blue collars), of which 20 are from the fishing sector.

The trade union participates in the negotiations for the collective agreement at sector level (this includes sectors A, DA and B) and also has the power to sign collective agreements. Up until now, it has signed all (i.e. 3 collective agreements+ their annexes) existing collective agreements (1991, 1995 in 2001) as well as all their annexes. The trade union also participates in negotiations at company level in the only enterprise in the fishing sector, in which a collective agreement has been signed. At the beginning of the 1990s, the trade union initially participated in talks in the framework of a tripartite concertation in the fishing sector, but then withdrew from these talks, as it was convinced it had achieved what it could and what it needed.

At the national level, the trade union is a member of the Confederation of Trade Unions '90, while due to lack of financial resources it is not a member of any organisations at either European or international level.

Workers' organisation(s)

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Trade Union of Agriculture and Food Industry of Slovenia	13,000	0	0	yes	EFFAT	IUF-UITA-IUL
Trade Union of Agri-Foodstuffs of Slovenia	1,200	20	41 (all employees in the 05.10 in Slovenia) / 20 members of the TU working in the 05.10 (%) = 48.7 %	yes	-	-

Source: Interview with representative of The Trade Union of Agriculture and Food Industry of Slovenia (17.2. 2006) and with representative of The Trade Union of Agri- FoodStuffs of Slovenia (13.2. 2006).

2.2. Description of the employers' organisations active in the sector

a) FOOD INDUSTRY ASSOCIATION / ZDRUŽENJE ŽIVILSKE INDUSTRIJE

The association in its current form started operating in 1997 and before that, other forms of operation were established. The association covers enterprises from sectors A, DA and B. Since membership is obligatory for all undertakings, all undertakings from the fishing sector are members of the association (all of which being in the private sector and mainly small enterprises). The association is financed by membership subscriptions and through provision of paying services for its members (these services are related mainly to the operation of the enterprises and the sector as a whole, covering A, DA and B in the EU). The association employs 5.5 people.

The association participates in sector bipartite dialogue and also has the power to sign collective agreements. Until now, the association or its previous forms of operation had signed all collective agreements (i.e. 3 collective agreements1991, 1995 in 2001) and their annexes. The organisation does not take part in CB at the company level and does not have power to sign collective agreements at company level. The reason is firstly legal; at the company level partners are the management of the company and the representative trade union(s) in the company. Since, in their opinion there has been no tripartite concertation in the fishing sector, the association has not signed any contracts up to now.

At national level, the association is a member of the Chamber of Commerce and Industry of Slovenia, while on the European level, it is only a member of professional organisations, and not of employers' organisations.

b) SECTION ON AGRICULTURE AND FOOD INDUSTRY / SEKCIJA ZA KMETIJSTVO IN ŽIVILSTVO

The section was founded in 1994 and it covers sectors A, DA and B (only aquaculture). It is financed by membership subscriptions, but has no employees (however, within the framework of the Employers' Association of Slovenia, of which it is a member, 7 people are employed). Among the section's members there are no enterprises belonging to the fisheries sector; thus the density of members in this respect is 0 %.

The section participates in the bipartite dialogue for concluding a collective agreement, which apart from fishing also covers sectors from A and DA, and within this scope also has the power to sign collective agreements. However, the section does not participate in the bipartite dialogue at company level. The reason is first of all legal; at company level, the partners are the management of the company and the representative trade union(s) in the company.

Furthermore, the section did not take part in the tripartite concertation, which according to the representative of the section at sector level actually never took place.

At national level, the section is a member of the Employers' Association of Slovenia.

Employers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation(data only for 05.1)			European affiliations	Others affiliations
Food Industry Association	1,048	41 employees	99 (all companies in 05.010 in Slovenia) / 99 members of Food Industry Association from 05.10 (%) = 100 %	yes	CIAA, CAOBISCO, GAM, FEFAC, EHPM	IADSA
Section on Agriculture and Food Industry	82	0	0	yes	-	-

Source: Interview with representative of Food Industry Association of Slovenia (24.2. 2006) and representative of Section on Agriculture and Food Industry (17.2. 2006, 6. 3. 2006)

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

All of the interlocutors informed us that no tripartite concertation exists in the sector concerned. Moreover, almost all of the interlocutors considered that there had never been any organised meetings or consultations between the Government and social partners. The only one to consider that occasional talks between the Government and social partners did take place is the representative of the Trade Union of Agri-Foodstuffs of Slovenia. He said that such talks had taken place in the early 1990s, when fishing was suddenly faced with the problem of fishing zones. Slovenian fishermen had, in fact, lost their fishing zone after Slovenia became independent and the border between Slovenia and Croatia was established. At that point, talks took place with the Government about the problems of this sector, the possibilities for its continued existence, the recognition of the qualifications of the employees and the purchase of new ships, with which they could fish in international waters. They also concerned consultation regarding the so-called fishing quotas between Slovenia and Croatia. Later this tripartite concertation was organised only on the level of state secretaries and management of the companies (comment from representative of the Trade Union of Agri-Foodstuffs of Slovenia on presented report).

3.2. Description of the bipartite SD in the sector

a) At sector level

At sector level, the actors of the negotiations for the collective agreement, which also covers the fishing sector, are the following: the Food Industry Association, the Section on Agriculture and Food Industry, the Trade Union of the Agriculture and Food Industry of Slovenia and Trade Union of Agri-Foodstuffs of Slovenia. However, as our interlocutors made clear, the negotiating framework for the collective agreement, that incorporates also the fishing sector, does not specifically refer to the sector in question. Also, the negotiating group for the collective agreement, in which the fishing sector is included, has no representatives of this sector in it. All interlocutors were of the opinion that no obligation to participate in a bipartite dialogue subsists, but rather that dialogue is subject to the interests of all social partners. The actors of a bipartite dialogue are basically recognised as partners. The question only concerns some occasional conflicts on recognition issues, i.e. if an organisation does not want to recognise another organisation and thus, does not want to recognise its power to negotiate and sign agreements. The trade unions have only voiced criticism towards the compulsory membership of companies in the Chamber of Commerce and Industry of Slovenia, whilst always regarding the Association, which forms part of this Chamber, as a negotiating partner. The representative of the Section for Agriculture and Food Industry mentioned last year's conflict between the two trade unions, when the Trade Union of the Agriculture and Foodstuffs industry of Slovenia questioned the participatory role of the Trade Union of Agri-Foodstuffs of Slovenia in the bipartite dialogue. At that time, there was a dispute that Trade Union of Agri-Foodstuffs of Slovenia was not representative for the field of agriculture and food industry at state level[215]. The representatives of the trade unions did not mention this conflict. The representative of the Trade Union of Agriculture and Food Industry of Slovenia emphasised, that the incorporation of the Trade Union of Agri-Foodstuffs of Slovenia in the negotiations is a tradition, since the trade union had been included already in the negotiations over the first collective agreement, when there was still no Law on the representation of trade unions. According to the opinion of the representative of the Food Industry Association, apart from the players mentioned, some other trade unions still exist, which would like to participate in the bipartite dialogue on the collective agreement, which also covers fishing. However, these trade unions are not representative and therefore do not meet the conditions to be included in the dialogue. There is also an organisation (Chamber for Agriculture and Forestry of Slovenia) which is trying to put forward interests of fishing sector, especially fish farming part of the sector. But the organisation cannot be accorded representative status so it is not formally recognised reciprocally as a partner in the SD. According to the representative of the Chamber for Agriculture and Forestry of Slovenia it is specifically workers and companies from fish farming that are identified with the organisation in question.

Three collective agreements have been signed and at present the collective agreement signed in 2001 and its annexes are still in force (but negotiations on new collective agreement are underway). These collective agreements cover all the workers and companies in the sector. Prior to this, two collective agreements had been signed, in 1991 and 1995 respectively, both of which had also been amended on several occasions. Collective agreements were normally valid for two years, and if no-one cancelled the contract or demanded an amendment it was automatically renewed for two more years. Now, the partners have begun to stipulate that the validity of the newly signed contract should be one year, since the agriculture and foodstuffs industry is so dynamic that a shorter period of validity would be needed. The last valid contract was signed by all the above mentioned participants in the bipartite dialogue. In Slovenia, there is automatic extension of the content of the agreement to parties in the sector that are not signatories to the agreement.

b) At company level

In Slovenia, the bipartite dialogue is also established at company level. The participants in the bipartite dialogue are representative trade unions within the company and the management of the undertaking. If a collective agreement is agreed in a certain company, it applies to all the employees of that company (automatic extension to all employees). There is no obligation to participate in CB at company level. There are no conflicts between participants regarding recognition issues. In the fishing sector, there is only one signed collective agreement in the 05.010 sector at company level (in 2001 in Riba d.o.o. – signed by management or leadership of the company and branch of the Trade Union of Agri-Foodstuffs of Slovenia in the company); its duration is 2 years (with possibility of automatic renewal). This company is the biggest one and has 29 employees. Otherwise, in companies of sectors A and DA, which are covered by the same sector, collective agreement as the fishing sector, the collective agreements that have been concluded are mainly in large enterprises. Yet, the latter amount to just 5 % (40 companies) of all enterprises in the sectors mentioned. Nonetheless, the representatives of the Trade Union of the Agriculture and Foodstuffs Industry of Slovenia and the Food Industry Association are of the

[215] It is, however, representative of the fisheries sector and at state level the trade union Confederation of Trade Unions '90, of which the Trade Union of Agri-Foodstuffs of Slovenia is a member, is representative. The representative of this trade union held that the employers' representatives never questioned the participation of the trade union in the bipartite dialogue, particularly since the trade union is the only one covering the fisheries field.

opinion that the collective undertaking contracts in sectors A and DA 'cover' almost half of the employees in A and DA. The representative of this employers' association estimates that in the future the number of undertaking contracts in enterprises from the sectors A and DA might increase, since the management of the undertakings would want to offer its employees the best conditions and so encourage people to work in the sectors mentioned.

Collective undertaking contracts should enable the workers to achieve an upgrade in their rights and privileges compared to those under the sector collective agreement. With the help of undertaking contracts, the companies should have the possibility of adjusting to specific situations which cannot be addressed by or reflected in a sector collective agreement. Therefore, there is a hierarchy between collective agreements at sector and company level. However, the representative of the Trade Union of Agri-Foodstuffs of Slovenia confirms that within the fishing sector, negotiations are more developed at company level than at sector level. At company level at least negotiations take place, whilst for sector collective agreements, in the field of fisheries, they don't even exist, fishing being simply included in the collective agreement. The representative of the Chamber for Agriculture and Forestry of Slovenia is very critical of the employers' organisations. He believes that none of the employers' organisations included in the SD strive to represent the interests of the fishing sector in the SD beyond the broader collective agreement.

Comment

In Slovenia, the sector B 05.0 includes only the activities of fishing (05.010) and fish farming (05.020), while the classification is consistent with the NACE classification, as well as the classification of the Statistical Office of the Republic of Slovenia. In Slovenia, there is no special collective agreement concluded for the fishing sector (05.010), but the sector is incorporated into a broader collective agreement that covers the sectors A 01.1, 01.2, 01.3, 01.4; B 05.0; DA 15, 16. The fishing sector is not an important sector since it represents 0.014 % of the GDP and 0.016 % of added value and it represents 0.005 % of employees in Slovenia.

At sector level, the participants in negotiations for the collective agreement, which also covers the fishing sector, are the following: Food Industry Association, Section for Agriculture and Foodstuffs, the Trade Union of the Agriculture and Food Industry of Slovenia and Trade Union of Agri-Foodstuffs of Slovenia.

All interlocutors were of the opinion that no obligation to participate in a bipartite dialogue exists, but rather that dialogue is subject to the interests of the social partners, having recognised each other mutually as partners. Currently, the collective agreement for the year 2001 (which contains both a tariff and a section on norms) is still in force, but it has already been amended by annexes several times. Social partners are at present negotiating a new collective agreement.

In Slovenia, bipartite dialogue is also established at company level (participants are representative trade union(s) within the company and the management). Collective undertaking contracts should guarantee better working conditions and higher payment etc. for workers; in short they should enable the workers an upgrade of their rights and privileges compared with the sector collective agreement. In the fishing sector there is only one collective agreement at company level.

SPAIN

1. Description of the sector’s characteristics at national level

1.1. Delimitation and scope of activities in the sector

According to the Spanish National Union of Maritime Cooperatives (Unión Nacional de Cooperativas del Mar de España, UNACOMAR) and the trade unions consulted, the delimitation of the sector in Spain corresponds to NACE 05. However, a distinction is also made and used by the different actors in the sector between coastal fishing (small seiners and trawlers working less than 60 miles from the coast) and deep-sea fishing (fairly close to the coast and on the open sea), and between national and international fishing grounds, because the problems involved are different. Tuna is not differentiated from other fish catches, but crustaceans and shellfish are. Since CB is practically non-existent in this sector in Spain, the activities included from this point of view are the concrete sub-sectors covered by the specific agreements.

1.2. Socio-economic features of the sector

In Spain, 10 of the 17 autonomous communities (or administrative regions) that make up the State have a coastline. Of these ten, three have the most important international fishing industry: Galicia, the Basque Country and the Canary Islands. Andalusia and Catalonia fish red tuna in non EU waters of the Mediterranean. The other regions only have coastal fishing industries. Spain has the largest fishing fleet in the European Union and is the country that consumes most fish. In general, commercial fishing is increasingly giving ground to fish farming. Commercial fishing in Spain is practised with a variety of techniques: trawling (for hake and prawns), seining (for sardines and anchovies), deep-sea long-liner fishing (for hake in places inaccessible to trawlers), and tuna seining. Other minor techniques are also used, such as dredging for molluscs and several types of artisan fishing. 80% of the Spanish fleet is artisan. The underground economy in the sector is practically non-existent according to UNACOMAR, but the CIG states that payments “in black money” are fairly common, particularly in deep-sea fishing. The Fishing industry represents about 0.4% of the Spanish GDP.
The size of companies in the Spanish fishing sector varies greatly, but the majority of them are small. Companies of mixed nationality are increasingly being created to exploit fishing grounds outside the European Union.

Companies

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Total of the activities included in NACE 05: Fishing and related service activities, excluding fish farming.	6,064	55.6% (3,374)	28% (1,700)	15.7% (950)	0.7% (40)	-

Source: FCT-CCOO

In 2004, coastal fishing represented 83% of the total employment in the fishing sector, and deep-sea fishing 17%.[216] The Spanish fishing sector is male dominated, particularly in deep-sea fishing, in which 90% of the people employed are men; in coastal fishing, and particularly in shellfish fishing, the proportion of women is higher. The average age is 40 and the level of education is medium-low (though a small proportion of the workers have a high level of technical training). Pay is low in most sub-sectors of the fishing sector compared with other sectors. The contracts are mostly permanent (80% compared with 20% on temporary contracts), though the number of temporary contracts shows an increasing trend. The CIG (Confederación Intersindical Gallega) states that in Galicia the employment in the fishing sector is very stable but that in other parts of Spain, contracts for work and service (which are illegal according to the trade union) are more common, and fixed-discontinuous contracts are used in specific fleets. The low level of pay in the fishing sector is leading to an increasing shortage of manpower, as workers choose better paid

[216] Figures obtained from the article: *Las cofradías en España: papel económico y cambios estructurales*, by Ramon Franquesa (Gabinete de Economía del Mar-Universitat de Barcelona, 2004).

jobs on land and employers are increasingly recruiting workers from non-EU countries. The union, CIG, claims that this sometimes leads to abusive practices and that the government has failed to take clear measures to tackle this problem. In the last ten years, deep-sea fishing in particular, has undergone major restructuring, with a decrease in quotas and a loss of fishing grounds (due to the lack of interest in political bargaining, according to the CIG), which has led to major job losses that have not been accompanied by social measures. In Spain there is a Special Social Security System for Seamen that is managed and administered through the Social Institute of the Merchant Navy (Instituto Social de la Marina), a national organisation that operates under the management and guidance of the Ministry of Labour and Social Affairs within the Secretariat of State for Social Security. The competences of this institute include health care of maritime workers and their beneficiaries within the national territory and of seamen on board ships and in other countries, health information for seamen, inspection and control of health and hygiene on board ships, training and professional promotion of maritime workers and the fulfilment of Convention 9 (the Placing of Seamen Convention) of the International Labour Organisation (ILO).

Workers

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	18,000	29,000 (of these more than 19,000 work on a "share of catch" basis)	0.18% *	39.7% (11,500)	53.4% (15,500)	6.9 % (2,000)	0

Source: FCT-CCOO
* 29,000 / 16,111,500 (source: Instituto Nacional de Estadística, II Trim. 2006)

There is some concern in the sector about the increasing shortage of species to catch due to the depletion of the fishing grounds, the low profitability of the sector, and the increase in the price of the fuel. The trade union LAB states that the fishing sector in the Basque Country has lost 70% of its fleet and an important proportion of direct and indirect employment in the last 20 years (since Spain joined the European Community). CCOO also states that the Common Fishing Policy contributes to the downward trend in the size of the Spanish fleet (15,000 fewer workers since 1995). The figures of the National Statistics Institute confirm the fall in the catch. In 1992, it was 1.79 million metric tons of live weight, and remained at a similar level before rising in 1995 to 1.179 million tons and in 1998 to 1.263 million tons. It then began to fall until it reached 845 million tons in 2003.

2. Description of the organisations active in the sector at a noational level

As far as employers' organisations are concerned, Spanish legislation establishes that representativeness to defend the general interests of sector employers depends on the number of companies affiliated to the organisation and their workers. Representativeness of the union depends on staff delegates or members in workers' committees elected at the workplace.
Note that in Spain, extension of collective agreements to parties that are not a signatory to the agreement is automatic provided that the collective agreement is signed by a majority of the representatives of each party to the agreement. Indeed, Spanish legislation establishes the criteria to be followed to constitute the negotiating commission in collective agreements: all organisations (union and employers') authorised to take part in the bargaining committee will take part according to their percentage of representativeness and the committee will be validly constituted when unions, federations or confederations and employers' organisations respectively represent at least the absolute majority of the members of the workers' committees and staff delegates, on their part, and employers employing the majority of workers affected by the agreement. For collective agreements at company level or below, the parties authorised to bargain are the workers' committees or staff delegates or union representatives, if they exist, and the employer or his representative. So, in Spain, extension of collective agreements is automatic provided the collective agreement is signed by a majority of the representatives of each party to the agreement.

2.1. A description of the trade unions active in the sector

The following table shows the distribution of delegates in the sector between the different trade unions:

NACE 05 (*): number of delegates and their distribution

Trade union	Number of delegates	Distribution
ELA-STV	59	8.7%
LAB	55	8.1%
CIG	48	7.1%
CCOO	248	36.6%
UGT	253	37.3%
Others	15	2.2%
TOTAL	678	100%

Source: Ministry of Labour and Social Affairs. 2005.
(*) Figures excluding fish farming were not available.

a) Solidarity of Basque Workers – Diversity / Euzko Langileen Alkartasuna – Hainbat (ELA-HAINBAT)

ELA-Hainbat is a federation of the trade union ELA, that represents members belonging to several sectors, mainly industrial ones. ELA was created in 1911, though it went underground during the dictatorships of Primo de Rivera and Francisco Franco. The Hainbat Federation was founded in June 2004 through the merging of four other federations, and is funded by the subscriptions from its 25,300 members (23% of the 110,000 members of ELA, all due-paying), of whom 327 (1.3% of the federation) are workers of the fishing sector, which represented 10-15% of the workers of the fishing sector in the Basque Country in 2005. All types of workers are affiliated. The Hainbat Federation covers the chemical, textile, graphic arts, transport, construction, wood, naval, fishing, energy, telecommunications, media and paper sectors. It has 31 employees.

ELA-Hainbat participates, negotiates and signs agreements in the bargaining of several provincial agreements of the Basque Country (e.g. the Fishnet Makers Agreement of Ondarroa, the Deep-Sea Trawling Agreement of Vizcaya, and the Cod Pair Fishing Agreement of Guipúzcoa). In fact, for the sector of Fishing, this organisation has the power to negotiate and to sign agreements at all levels of the autonomous community of the Basque Country (provincial, regional, sector and company levels). On the other hand, this organisation has not the power to negotiate and to sign national agreements or any agreement out of the Basque Country. ELA is an integral part of the Social Institute of the Merchant Navy, and has regular consultative meetings with the Ministry of Agriculture, Fisheries and Foodstuffs of the Basque government.

At national level, this organisation is affiliated to ELA.

b) Transport and Sea Sector / Langile Abertzaleen Batzordeal (LAB) – Garraioak Eta Itsasoa[217]

LAB is a Basque trade union that was founded in 1976 and is funded independently. The Transport and Sea Sector of LAB was founded in 1996 and covers the sub-sectors of fishing, ports, airports, telephony, railways, goods transport and passenger transport, among others; three full-time organisers work in this sector of the trade union. All types of workers are affiliated.

For the sector of Fishing, this organisation has the power to negotiate and to sign agreements at all levels of the autonomous community of the Basque Country (provincial, regional, sector and company levels). On the other hand, this organisation does not have the power to negotiate and to sign national agreements or any agreement outside of the Basque Country.

At national level, this organisation is affiliated to LAB.

[217] This means “Transport and Sea”, it is written in Euskera, which is an official language in the Basque Country.

c) Galician Multi-Union Confederation / Federación Gallega de Alimentación, Mar, Transporte, Textil y Telecomunicaciones y actividades afínes de la Confederación Intersindical Gallega (FGAMT-CIG)

The FGAMT resulted from the merging of the Maritime, Transport and Foodstuffs federations within the CIG. The Maritime Federation was created in 1975 and won the last trade union elections in Galicia for NACE 05. The Federation is funded by members' subscriptions and covers the sub-sectors of fisheries, fish farming, shellfish fishing, loading and unloading. According to the CIG, about 40-50% of workers in Galician fisheries tend to be trade union members, depending on the incidents that arise in the sector. All types of workers are affiliated. No data are available on the number of people which are part of the staff.

For the sector of Fishing, this organisation has the power to negotiate and to sign agreements at all levels of the autonomous community of Galicia (provincial, regional, sector and company levels). On the other hand, this organisation does not have the power to negotiate and to sign national agreements or any agreement outside of Galicia. CIG takes part in the following advisory bodies: the Galician Industrial Relations Council, the Galician Economic and Social Council, the Galician Fisheries Council, the Spanish Economic and Social Council, the Advisory Committee of the Fishing Sector, the Social Institute of the Merchant Navy and the International Labour Organisation.

At national level, this organisation is affiliated to CIG.

d) Federation of Communication and Transport of Trade Union Confederation of Workers' Commissions / Federación de Comunicación y Transporte de Comisiones Obreras (FCT-CCOO)

FCT-CCOO belongs to the Confederación Sindical de Comisiones Obreras (Central Trade Union Confederation of Workers' Commissions), a national trade union created in the late 1950s. The federation is mainly funded by members' subscriptions. The Communication and Transport Federation of the Trade Union Confederation of Workers' Commissions represents workers in the communications and transport sectors. The Maritime Sector of the Communication and Transport Federation of the Trade Union Confederation of Workers' Commissions represents the workers in the fishing industry, divided into the following sub-sectors: state-owned ports, the merchant navy, loading and unloading, fishing, internal traffic (mooring, piloting and navigation aids) and external traffic. Six employees, three in Galicia and three in Andalusia, work in the Maritime Sector. Membership is voluntary in Spain, and only workers on boats with a crew of over six join trade unions. Self-employed workers, who are very common in the section, do not. All types of workers are affiliated.

CCOO takes part in all types of CB, at different levels, in the fishing industry. It also it takes part in the tripartite concertation, when it occurs. CCOO is, jointly with UGT, the most important trade union in Spain, acting at national level. The Communication and Transport Federation of CCOO is represented in a variety of forums and institutions: the Economic and Social Council (CES), the Advisory Council for Telecommunications and the Information Society, the Postal Advisory Council, the Higher Road Traffic and Safety Council, the Social Observatory for Road Transport, the Tripartite Foundation for Lifelong In-Company Training, and the Social Institute for the Environment and Health at Work. FCT-CCOO is also represented in all Spanish, EU and international organisations with trade union representation.

e) General Workers' Confederation - Federation of Transport, Communications and the Sea / Federación de Transportes, Comunicaciones y Mar de la Unión General de Trabajadores (FETCM-UGT)

FETCM-UGT did not respond to our questionnaire.

At national level, this organisation is affiliated to the General Workers'Confederation (Unión General de Trabajadores, UGT).

Workers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/ No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Basque Workers' Solidarity – General Industrial	25,300	327	1.1% (327 / 29,000) in Spain and between10-15% in the Basque Country	yes	ETF, ETUC	ITF, ICFTU
LAB-Transport and Sea Sector	2,300	385	1.3% (385 / 29,000)	yes	ND	ND
Galician Multi-Union Confederation	7,900	2,300	8% (2,300 / 29,000) in Spain and between 40-50% in Galicia	yes	ND	ND
Federation of Communication and Transport of Trade Union Confederation of Workers' Commissions	107,000 (of whom 5,000 belong to the Maritime Sector)	1,700	5.9% (1,700 / 29,000)	yes	ETF, ETUC	ICFTU
General Workers' Confederation - Federation of Transport, Communications and the Sea	ND	ND	ND	yes	ETF, ETUC	ICFTU

Source: Information provided by the organisations themselves. 2006.

2.2. Description of the employers' organisations active in the sector

a) Fishermen's associations / Cofradías de pescadores

Fishermen's associations (*cofradías*) have existed in Spain since the Middle Ages, when agreements were established between the community of fishermen and the king or the Church to exploit fishing resources. The *cofradías* are guild-like organisations that became widespread in the 17th century. At present, almost all Spanish fishing towns have their own *cofradía*, with different levels of power and influence. As it is not an organisation, it is hardly possible to know the staff of each (there were 229 *cofradías* in Spain in 2004). In the present-day *cofradías* the ship-owners and seamen have a fairly similar status. The system operates only in coastal fisheries and not in the industrial fleet. It therefore represents the vast majority of the workers but only just over half the output and investment. In 2004, there were 229 *cofradías* in Spain. Cofradías are not recognised as actors in CB (they are not trade unions nor employers organisations, they are a special kind of organisation of workers and employers)[218].

b) Cooperative of Fishing Ship-owners of the Port of Vigo / Cooperativa de Armadores de Pesca del Puerto de Vigo, S. Coop. Ltda (ARVI)

This Cooperative was set up in 1964 with the aim of fostering the economic and social improvement of its members, and is currently the most important ship-owners' group in Spain. It offers its members services such as accountancy, assistance with labour issues and social security and taxation, dealing with fishing permits, management and procession of structural funds, legal

[218] The cofradías function as follow: The *cofradías* include all the fishermen who work in their geographic area; They have two representative groups: owners and seamen; Their members must sell at the auction (fish market) of the *cofradía*, which charges a commission on sales of between 1.5 and 3% to meet administrative costs; They may not make a profit. The surpluses are either used to improve infrastructures or distributed among the members. In their area, they can establish additional rules to those of the European Commission, the Ministry of Agriculture, Fisheries and Food (Ministerio de Agricultura, Pesca y Alimentación, MAPA) and the autonomous communities (rules on fishing time, gear, reserves and seasons, and acceptance of new members). All the members participate in the monitoring of collective agreements; They may not regulate industrial fishing. They are normally regulated by the autonomous communities (Information on *cofradías* in Spain obtained from the article: *Las cofradías en España: papel económico y cambios estructurales*, by Ramon Franquesa (Gabinete de Economía del Mar-Universitat de Barcelona, 2004).

advice, management of unloading of fresh fish, renting of digital scales, provision of reusable plastic boxes, management of ship's certificates, supply of marine fuel and lubricants, specialised divers, high-quality bait at very competitive prices, storage for ships, management and processing of moorings, joint purchases of ship's materials to obtain better prices, civil liability insurance and statistics, planning and catch plans. At present ARVI is composed of 271 companies with a fleet of 397 ships, of which 225 are freezing ships, 170 are fresh fish ships and two are cod fishing ships. The catches of these companies are in excess of 400,000 metric tons per year, including fresh, frozen and salted fish.
ARVI is a voting member and is affiliated at national level to the following Spanish entities and institutions: the General Union of Maritime Cooperatives of Spain (UNACOMAR), the Spanish Federation of Fishing Organisations (FEOPE), the Spanish Economic and Social Council (CES) and the Federation of Entrepreneurs of the Province of Pontevedra (CEP). This organisation participates to discussion in the Fish Advisory Committee of the EU.

ARVI also deals with the administrative management of nine professional associations and two organisations of producers operating at national, regional or provincial level and based in the Port of Vigo:
- **The National Association of Hake Freezer Vessel Owners (ANAMER):** an association operating at a national level. The fleet associated with ANAMER catches mainly hake, but also squid, gurnard, black halibut and other species. This association represents the largest and most technologically advanced ships of the Spanish fishing fleet.
- **The National Association of Freezer Vessel Owners of Various Fisheries (ANAVAR):** an association operating at a national level. The vessels that belong to ANAVAR are medium-size freezer-trawlers. The main species fished are squid, octopus, cuttlefish, hake, plaice, meiga, skate, gurnard, forkbeart, halibut and prawn.
- **The Association of Community Companies in Joint Fishing Enterprises:** this association represents owners of large and medium-size freezer vessels that have set up joint enterprises in other countries of the world (Argentina, Chile, Peru, Namibia, Falkland Islands, South Africa, Morocco, etc.).
- **The National Association of Distant Water Longliner Vessel Owners (ANAPA):** an association operating at a national level, founded in 1988. These are all freezer vessels which undertake longliner surface fishing, though they can operate with other fishing gear. They fish essentially for swordfish, mako shark and other dogfish.
- **The National Cod Fishing Boat Owners' Association (AGARBA):** an association operating at a national level that represents cod fishing boats.
- **The Gran Sol Fishing Boat Owners' Association (ANASOL):** this association represents owners of fishing boats working in waters of the European Union. Most boats in the fleet are trawlers, though there are also longliner vessels. Most undertakings in this association are family enterprises and they bring in a variety of fresh fish.
- **The Pontevedra Provincial Association of Spanish Shore and Southern Portugal Fishing Boat Owners (ARPOSUR):** an association of the province of Pontevedra, whose boats fish alternately in Galician and Portuguese waters and land fresh fish.
- **The Pontevedra Provincial Association of Longliner and Other Fishing Vessels (ARPOAN):** an association covering the province of Pontevedra and consisting of longliner surface fishing vessels. The activity of the ARPOAN fleet depends directly on the species fished for, all of which are migratory: sword fish, mako shark, blue shark, travellay and skipjack.
- **The Pontevedra Provincial Fishing Boat Owners' Assocation (CERCO):** an association of the province of Pontevedra, representing inshore seining vessels. The fleet operates in the estuaries and along the coast of Galicia. The main species fished for is sardine, and it lands fresh fish caught the same day.
- **The Organisation of Producers of Freezing Vessels of Merluccids, Cephalopods and Various Species (OPPC-3):** an organisation operating at a national level that was set up in 1986, after Spain joined the European Community. The OPPC-3 represents about 60% of the freezing fleet of the EU and its main aim is to rationalise fishing and to improve the conditions of sale of its members. Every year it develops catch plans to adapt the supply to market needs.
- **The Organisation of Fresh Fish Producers of the Port of Vigo (OPPF-4):** an organisation operating in the province of Pontevedra that was set up in 1986 and represents boats that land fresh fish. The organisation draws up catch plans and establishes catch limits for some species when necessary.

ARVI approved the present report and did not provide more information.

c) National Union of Spanish Maritime Cooperatives / Unión Nacional de Cooperativas del Mar (UNACOMAR)
UNACOMAR was set up in 1939 and represents 200 Spanish maritime cooperatives, all of which have the status of maritime fishing cooperatives. These cooperatives represent and defend the professional fishing interests of the ship-owners and fishermen who are members, and carries out all types of activity related to the sea. The cooperatives of deep-sea fishing vessel owners tend to represent large ship-owning enterprises, whereas the cooperatives for shellfish fishing, fish farming and activities related to the use of boats tend to represent small enterprises. In total, the

cooperatives represent approximately 20% of the workers in the Spanish fishing sector. The economic activities that UNACOMAR covers are: deep-sea and coastal fishing, marketing of fish products, purchase and sale of fishing gear, shellfish fishing, fish farming and services associated with these activities. The sub-sectors covered are all those of commercial fishing, shellfish fishing and fish farming, and the marketing of sea products. The organisation is funded by the fees of its members and by a subsidy from the Ministry of Labour and Social Affairs. None of the staff working for UNACOMAR are wage-earners.
UNACOMAR does not take part in sector CB.
UNACOMAR belongs to and is affiliated to at national level the CEPES (Spanish Employers Confederation of the Social Economy) and has representation in the Social Economy Advisory Council of the Ministry of Labour and Social Affairs and on the Fisheries Advisory Committee of the Ministry of Agriculture, Fisheries and Food.

UNACOMAR did not provide more information.

d) Spanish Federation of Fishing Organisations / Federación Española de Organizaciones Pesqueras (FEOPE)
FEOPE was created in 1999 and is a national federation composed of 17 associations/organisations that represent 471 companies. Three staff is working on FEOPE nowadays. The Federation is funded by members' dues and sometimes by organising conferences or congresses. It also receives some subsidies. All its members are associations of the extractive fishing sector, and are the following:

- Asociación Nacional de Armadores de Buques de Pesca de Bacalao (AGARBA). It has 1 firm with 2 vessels. It operates in Svalbard, NAFO and Hatton Bank, catching cod.
- Asociación Nacional de Armadores de Buques de Pesca en el Gran Sol (ANASOL). It has 60 firms and 73 vessels. It operates in international waters.
- Asociación Provincial de Armadores de Buques de Pesca del Litoral Español y Sur de Portugal de Pontevedra (ARPOSUR). It has 3 firms and 3 vessels. It operates in Spanish and Portuguese waters.
- Asociación Provincial de Armadores de Buques de Pesca de Palangre y otras Artes de Pontevedra (ARPOAN). It has 23 firms and 24 vessels. It operates in the North Atlantic and in not UE countries.
- Asociación Provincial de Armadores de Buques de Cerco de Pontevedra (CERCO). It has 25 firms and 25 vessels. It operates in interior waters and Portugal.
- Asociación Nacional de Armadores de Buques Congeladores de Pesca de Merluza (ANAMER). It has 27 firms and 43 vessels. It operates in international waters. The most advanced technology in the sector is in these vessels.
- Asociación Nacional de Armadores de Buques Congeladores de Pesquerías Varias (ANAVAR). It has 13 firms and 17 vessels. It operates in international waters.
- Asociación Nacional de Armadores de Buques Palangreros de Altura (ANAPA). It has 39 firms with and 45 vessels. It operates in the Atlantic Sea, the Indic and the Pacific Ocean.
- Organización de Productores Asociados de Grandes Atuneros Congeladores (OPAGAC). It has 6 firms and 12 vessels. It operates in the Atlantic Sea, the Indic and the Pacific Ocean.
- Asociación Empresarial de Espaderos Guardeses (E&G). It has 22 firms with 250 employees and 22 vessels. It operates in the Atlantic Sea and the Indic.
- Asociación de Armadores de Arrastre de Tarragona. It has 31 firms with 200 employees and 31 vessels. It operates in the Mediterranean Sea.
- Asociación de Armadores de Buques de Pesca de Barcelona y Gerona. It has 37 firms with about 200 employees and 40 vessels. It operates in the Mediterranean Sea.
- Asociación Local de Empresarios de Pesca Costera o Litoral de Castellón de la Plana. It has 44 firms and 48 vessels. It operates in the Mediterranean Sea.
- Asociación de Armadores de Pesca de Atún con Artes de Cerco (L'Ametlla de Mar). It has 6 firms and 6 vessels. It operates in the Mediterranean Sea.
- Organización de Productores Pesqueros de la Marina Alta (Denia, Calpe y Jávea). It has 80 firms and 85 vessels.
- Organización de Productores Pesqueros de Peix Blau de la Provincia de Tarragona. It has 22 firms and 23 vessels.
- Puerto de Celeiro S.A. It has 32 firms and 36 vessels.

FEOPE does not take part in CB of the sector at sector and company levels. As tripartite concertation is not very important in this sector in Spain, it is not so sure for this level of bargaining.
FEOPE, together with ONAPE (National Organisation of Fishing Associations), represent almost the whole Spanish fleet operating in international waters. Under the fishing agreements of the European Union it has agreements with 13 African countries and one in the Pacific. It represents the most of the extractive fishing sector in Spain. FEOPE participates in the following organisms: Comité Consultivo del Sector Pesquero, Consejo Económico y Social, Consejo General del Instituto Social de la Marina, Comité Consultivo del Sector Pesquero, Comisión Ejecutiva

Provincial del Instituto Social de la Marina, Consejo General de Organizaciones Interprofesionales Agroalimentarias, Observatorio de Precios de los Alimentos, Consejo Rector del Instituto Español de Oceanografía, Comisión Paritaria de la Fundación Tripartita para la Formación en el Empleo, Grupo de Trabajo sobre el Sector Pesquero created by the Secretaría General de Comercio Exterior, Comisión de Coordinación con las Instituciones Comunitarias, Comité de Seguimiento del IFOP, Patronato de la Fundación Instituto Tecnológico para el Desarrollo de las Industrias Marítimas "INNOVAMAR", Foro Científico de la Pesca en el Mediterráneo and the Comisión Denominaciones Comerciales de las Especies Pesqueras de España.
At national level, it is member of the CEOE (Confederación Española de Organizaciones Empresariales).

e) Spanish Federation of Fishing Vessel Owners / Federación Española de Armadores de Buques de Pesca (FEABP)
FEABP did not respond to our questionnaire.

f) Commercial Maritime Union / Unión Comercial Marítima (UCOMAR)
UCOMAR did not respond to our questionnaire.

g) The National Federation of Cofradías of Fishermen / Federación Nacional de Cofradías de Pescadores
The National Federation of Cofradías of Fishermen did not respond to our questionnaire.

Employers' organisations

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
Fishermen's Associations	ND	ND	ND	ND	ND	ND
Cooperative of Fishing Ship-owners of the Port of Vigo	397 vessels (ND for the number of companies)	8,500 crew	ND	Yes	COGECA-Fisheries, AEOP	-
National Union of Spanish Maritime Cooperatives	200 maritime cooperatives	10,000 employees	3.3% (200 / 6,064)	*Yes*	COPA COGECA-Fisheries	MEDISAMAK
Spanish Federation of Fishing Organisations	471 companies, with a fleet of 535 fishing vessels	9,500	7.8% (471 / 6,064)	Yes	Europêche	MEDISAMAK
Spanish Federation of Fishing Vessel Owners	ND	ND	ND	Yes	Europêche	-
Commercial Maritime Union	ND	ND	ND	Yes	COGECA-Fisheries	-
National Federation of Cofradías of Fishermen	ND	ND	ND	No	Europêche	-

Source: July 2006, information provided by the organisations themselves

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

Tripartite bargaining in the Spanish fishing sector is practically non-existent and has only occurred in very exceptional cases. However, there are processes of information and consultation between the government, the employers' organisations and the trade unions through the General Secretariat for Sea Fisheries (SGPM), which depends on the Ministry of Agriculture, Fisheries and Food (MAPA) and through the Advisory Committee on Fisheries and Aquaculture (ACFA), created by the European Commission in 1971 and renewed in 1999. The aim of these processes is to bear in mind the opinions of the stakeholders and to foster analyses based on the application of the Common Fishing Policy. The ACFA is composed of 21 representatives of professional organisations representing the sectors of production, processing, distribution fish farming, and non-professional organisations representing the interests of consumers, the environment and development.

Specific agreements are also established in the institutional bodies of the Special Maritime Social Security System and in the training agreements of the fishing sector. Because of the importance of the sector in the region (fisheries represent 10% of its GDP), the Xunta de Galicia (the Galician regional government) has a Ministry of *Fisheries and Maritime Affairs*. Employers' associations, cofradías[219] and trade unions participate in the sector through the Galician Fisheries Council, which has 50 members and is chaired by the Minister for Fisheries. Other autonomous communities had similar institutions.

3.2. Description of the bipartite SD in the sector

a) At sector level

In general, the trade unions consulted state that CB has little impact in the sector; UNACOMAR claims that it is practically non-existent. There are only sector or sub-sector agreements, all at a provincial or regional level and signed by the trade unions (ELA, LAB, CIG, CCOO and the UGT in their respective regional spheres) and by provincial employers' organisations. According to the CIG, the main subjects of interest from the viewpoint of CB are occupational risk prevention, health and safety at work, relocation of companies and training of seamen. There is no obligation to participate at CB at sector level. There are no conflicts between players regarding recognition issues.

Some sectors and sub-sectors with provincial agreements are seining and fresh fish trawling (the 2004 Collective Agreement for Fresh Fish Trawlers of the Autonomous Community of Cantabria), deep-sea trawling (the 2006 Deep-Sea Trawling Agreement of Vizcaya), fresh-fish trawling (the 1997 Collective Agreement for Fresh-Fish Trawling in the Gran Sol), fishnet makers (the 2006 Fishnet Makers Agreement of Ondarroa), and pair fishing (the 2005 Cod Pair Fishing Agreement of Guipúzcoa). There are also several agreements for activities related to fisheries:

- The Collective Agreement for the Sector of Preserved, Semi-Preserved, Smoked, Boiled, Dried, Processed and Salted Foodstuffs and Oil and Flour from Fish and Shellfish, a national agreement for the period 2001-2005.
- The National Collective Agreement for the Industrial Cooling Sector. 2001-2003.
- The 4th Framework Agreement of the Loading and Unloading Sector, which is currently pending agreement after many disputes and setbacks in the bargaining process.

Finally, there are agreements on life-long training in the sector.

b) At company level

There are also some agreements of specific fleets. For example, for these specific fleets, there is the National Agreement of the Shellfish Freezing Fleet signed by the National Association of Cephalopod Freezing Ship Owners (ANACEF) for the period 1996 to 1999.

[219] The cofradías are another common forum of dialogue between the actors in the sector.

Comment

The trade unions have a negative view of the SD in the sector, stating that there are many obstacles and little desire for dialogue. The trade union CIG states that there is a lack of interest by the government, the employers' associations and sometimes even the trade unions, because fishing is not important at a national level. For Galicia, however, it is a fundamental sector of the regional economy (10% of its GDP). The CIG states that the employers only understand bargaining aimed at obtaining state subsidies. CCOO also mentions the need to foster a better articulated, more rational and less atomised CB in the sector; the content of CB must be better developed and problem-solving mechanisms must be established and improved. CCOO agrees with the CIG that the employers in the sector show a lack of interest in developing the SD, and that the government must be more active in this direction.

CCOO claims that there is an urgent need for modernisation of businesses and regulation of employment in the sector. Young people are not joining the sector and the number of students on nautical and fishing courses is falling dramatically. CCOO warns that the new EU fishing policy (2007-2013) may bring about major changes for Spain, and that there is a need for an ILO convention for fishing, as there is for the merchant navy. It also stresses the importance of training and employment aimed at attracting young people to the sector, and the need for specific studies on industrial accidents in the sector.

FEOPE claims that is necessary that the Spanish fishing sector choose to specialise, because the globalisations of markets permit the entrance of cheap fish to Spain, from other countries.

SWEDEN

1. Description of the sector's characteristics at national level

1.1. Delimitation and scope of activities in the sector

From a statistical point of view, the fishing sector includes activities classified under the section B, division 05 of the NACE categories. In order to stay within the recommended delimitation set out in the programme schedule, we have restricted the quantitative analysis of the sector to the following sub-sections:

- Trawling, in sea water
- Other sea water fishing
- Fresh water fishing

There is no conventional field of activity which corresponds to the fishing sector and it does not have employers' and trade union organisations, in the strict sense, which are signatories to the collective agreements.

1.2. Socio-economic features of the sector

Sweden has two large seaboards, one on the Baltic sea and the Gulf of Bothnia and the other on the North Sea (Skagerrak, Kattegat) to which must be added lakeland areas and other considerable bodies of water (38,558 km^2 of inner waterways), which enable professional haleutic activity to be carried out. The activity of the Swedish fishing fleet is spread from the north east Atlantic to the Gulf of Bothnia. The 2,862 km of coastline have meant that Sweden has long been a maritime nation. Cod, herring, sprat (anchovies), shrimps and langoustine (Dublin Bay prawns) are the main species caught in terms of tonnage and account for ¾ of the value of the catches. The Baltic Sea coast is where 50% of the revenues of professional fishing are earned.[220]
In 2005, the share of the fishing sector in the Swedish GDP was 0, 1%. Between 1995 and 2005 the volume of production of the sector went up by approximately 13%. Given that employment and the number of vessels decreased over the same period, the productivity of the sector went up.

a) Continental Fishing

In 2005, professional fishing in fresh water produced a volume of 1,418 tons[221] for a wholesale value of 51,926 millions Swedish Kroner[222]. From an economic point of view, the most sought after species are pike-perch, eels, and crayfish whose value was 21 million for the pike-perch, 11.1 million for crayfish, and 7 million for eels. Production is mainly concentrated in the area of the four big lakes (Vänern 29%, Hjälmaren 23%, Mälaren 21 %, and Vättern 17 %, with the other lakes accounting for 12% in total). Around 200 professional fishermen are responsible for this production.

b) Haleutic production methods

b.1) The Fleet

The Swedish maritime fishing fleet is essentially artisan in character. Coastal and small-scale fishing are the main activities. The fleet is composed of around 1,589 vessels with a total tonnage of BT 44,110, divided into six segments according to type of catch, the techniques used and the size of the trawler. The major part of the fleet is composed of boats below 12 metres in length (around 1,300 of the licensed vessels). It represents 1.77 % of the European fleet[223]. The capacity of the Swedish fleet has decreased over recent years, particularly as a result of measures taken to reduce it, in the context of the Community Multi-annual Orientation Programmes (POL) to reform and adapt fishing capacity. The crews are never more than 20 people.

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[220] Source : Ministère de l'Agriculture- Jordbruksdepartementet, Skrivelser Skr.2005/06:171
[221] Source : Fiskeriverket/Statistics Sweden, (SCB), JO 56 SM 0601, 2006.
[222] 1SEK=0,1099 €.
[223] 1,589/89,295- Estimation based on data for 2004-2005 from FAOSTAT and from the Fishing and Maritime Affairs department of the EU.

b.2) The Techniques

The fishing techniques in Sweden are classified according to two criteria relating to the equipment used, which are « stationary equipment » (fish-pots) and «drag equipment » (drag-net fishing boats, trawl net boats, seine net boats and the nets). These techniques depend on the species being sought, their size and the fishing zones.

There is no data available on the estimated importance of the underground economy.

The distribution by size of enterprise in the sector contrasts remarkably with that of the total economy, in particular with regard to the proportion of of enterprises with no employees, which is considerably higher in the fishing sector (75% for the total economy). The number of fishing vessels went from 2,508 in 1995 to 1,630 in 2005, a reduction of nearly 30%.

Companies (2005)

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-499 employees	% companies with › 500 employees
Total of the sector (section B de la nomenclature NACE sous section 05.011-05.012)	1,424	1,323/1,424= 92,91 %	99/1,424=6,95%	2/1,424= 0,14 %	0	0

Source: Fötetagsdatabaser, Statistics Sweden SCB, 2006

In 2005, the fishing sector represented about 0,037% of the active working population in Sweden (and 0.008 % of the paid employment, being about 280 paid employees). Paid employment was 17% of total employment in the sector, with the othjer 83 % consisting of self-employed workers. At the same date, the percentage of women employed in the sector was 1%.[224] Over the period 1995-2005, employment in the fishing sector went down by nearly 51%. There is no data available on the characteristics of the employment in the sector in terms of categories of workers, qualification levels, wages[225] and atypical work.

Workers (2005)

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-499 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›500 workers in the sector/ number of employees in the sector (%)
Total of the sector	1,323	282	0.0075 %	261/282 = 92.6 %	21/282 = 7.4%	0	0

Source: Fötetagsdatabaser, Statistics Sweden SCB, 2006

[224] According to the Ministry opf Agriculture (*Jordbruksdepartementet)*, sweden had about 1,913 licensed sea fishermen, of which 186 were licensed for continental fishing. According to the same source, there were 17 women in the fishing industry.

[225] As noted int he report, the SFR association has set up a standard contract, which sets out the status of the sea fisherman and the conditions of remuneration. All sea fishermen with an activity on board a fishing boat, must be considered as a self-employed person (*enskild näringsidkare*). In this respect, they are expected to pay their own employer's contribution and their social security contributions (retirement, unemployment fund, etc.). All fishermen are remunerated by a share in the catch and the remuneration is a function of the result of the fishing expedition, whether they work in the industrial fishing sector or in the artisanal sector.

2. Description of the organisations active in the sector at national level

The fishing sector does not have an employers' organisation, in the strict sense of the word, that is an organisation that can sign collective agreements. However, the fishing industry does have a fishermen's association which looks after the interests of the sector and which is the main interlocutor with the authorities, *The National Board of Fisheries* (Fiskeriverket), the Ministry of Agriculture (*Jordbruksministeriet*) and the European Union. Because of the specificities of the sector, that is the extremely low number of paid employees and the preponderance of self-employed workers, the fishing industry does not have a trade union organisation either.

The Swedish Fishermen's Federation / Sveriges Fiskares Riksförbund (SFR)

This federation was set up in 1948 and is an independent non-profit making association, which looks after the interests of the fishing sector. It finances its activities essentially through members' subscriptions. The headquarters of the association is on the west coast (Gothenburg) and has five permanent staff. It should be noted that this association includes both employers (fishing boat owners) and self-employed sea fishermen.

It is recognised by the public authorities. It is the main interlocutor with the authorities, which are *The National Board of Fisheries* (Fiskeriverket), the Ministry of Agriculture (*Jordbruksministeriet*) and the European Union, particularly with regard to the application of the directives and regulations governing the fishing industry. As previously mentioned, the fishing sector does not have a collective agreement. On the other hand, the SFR association has set up standard employement contract which sets out the status of the sea fisherman and his conditions of remuneration. All sea fishermen with an activity on board a fishing boat, must be considered as a self-employed person (*enskild näringsidkare*). In this respect, they are expected to pay their own employer's contribution and their social security contributions (retirement, unemployment fund, etc.)[226]. All fishermen are remunerated by a share in the catch and the remuneration is a function of the result of the fishing expedition, whether they work in the industrial fishing sector or in the artisanal sector.

At national level, the federation is not affiliated to any other organisation.

Organisation (English name)	Active Members	Estimation of the density	CB (Yes/No)	Affiliations	
				European affiliations	Others affiliations
Swedish Fishermen's Federation	1,540*	1,540/1,605** =95,9%	No	Europêche	Baltic Fishermen Association, Bfa, RAC north sea and Baltic, Pelagic RAC

Source: *Interviews with the SFR representative (2006)

**SCB: National Institute for Statistics and Economic studies, Statistics Sweden (2005).

3. Description of the SD in the sector at national level

3.1. Description of the tripartite concertation in the sector

There is no tripartite concertation in the sector at any level. Consultations take place between the SFR and the public authorities particularly concerning the application of directives and fishing regulations.

3.2. Description of the bipartite SD in the sector

There is no bipartite SD in the sector at any level (sector, company or other).

226 Sea fishermen qualify for temporary unemployment benefit in the case of storms and bat weather. Furthermore, they qualify for unemployment benefit in the case of bankruptcy and breach of contract. In 2005, 959 sea fishermen received unemployment benefit (50,647 days compensated). The average level of compensation was 595 SEK per day.

There is no evaluation of the bipartite SD at sector level since there are no social partners, strictly defined, in the sector. Nor is there any promotion of the bipartite SD by the public authorities at sector level.

Comment

In general terms, even if the fishing products sector accounts for a marginal part of the Swedish economy with approximately 0,1% of GDP, it does have a certain importance in terms of socio-economic and environmental factors. Coastal fishing contributes to the tissue of socio-economic activity of the coastline through the ancillary activities that it generates (i.e. the agro-alimentary processing industry, ship repairing, development and maintenance of harbour infrastructure etc.). Over the last decade, employment numbers have declined significantly while the volume of production has gone up consistently, which implies a remarkable increase in productivity. The fishing sector typically has a large number of self-employed workers (about 85 % of total employment) and high proportion of small enterprises (no company with more than 10 employees).

Because of the specificities of the sector, the fishing industry does not have any employers' or trade union organisations and consequently there are no collective agreements in the sector. However, the fishing industry does have a fishermen's association, *t*he *Swedish Fishermen's Federation – Fisheries in Sweden,* which looks after the interests of the the sector and which constitutes the privileged interlocutor with the public authorities, both at national and European level. It should be noted that this organisation includes both fishing boat owners and self-employed workers.

THE UNITED KINGDOM

1. Description of the Sector's Characteristics

1.1. Delimitation and scope of the activities in the sector

From a statistical point of view, the Fishing sector represents group 05 in section B within the NACE classification which includes fishing and related services activities. From the point of view of the organisations that take part in this report, the sector includes catch of sea fishing. The activities taken into account are those considered from a statistical point of view.

1.2. Socio-economic features of the sector

In 2004, the Sea Fishing sector represented about 0.03% of total turnover. The total turnover has increased 8.2% between 2000 and 2004. Compared to the whole economy, the fishing sector represents 0.03% of the GDP. There is no data available on the importance of the underground economy.

Employment and output in the Fishing Sector: Section B: Group 05 – Fishing and related services activities

Year	Number of enterprises	Total Turnover	Approximate gross value added at basic prices	Total employment- point in time	Total employment average during the year	Total employment costs
	Number	£ million	£ million	Thousand	Thousand	£ million
2000	3,608	691	293	8	9	63
2001	3,792	676	311	10	10	58
2002	3,686	661	254	8	8	45
2003	3,494	651	255	9	9	57
2004	3,402	753	367	8	8	56

Source: Annual Business Inquiry, Office for National Statistics, December 2005.

The Fishing Industry is comprised almost exclusively of SMEs and family owned enterprises. The companies are spread in the costal periphery and the great majority of employees are male. The average employment size of firms in the sector is about 2.4 employees. The sector is characterised by share fishing, where remuneration is based on a share of the catch. There is no data available on the characteristics of the employment in the sector in terms of categories of workers, qualifications level and atypical work.

Companies NACE Section B Group05 – Fishing (2004)

Sub-sectors	Number of companies	% companies without employees	% companies with ‹10 employees	% companies 10-49 employees	% companies 50-249 employees	% companies with › 249 employees
Total of the sector	3,402	ND	ND	ND	ND	ND

Source: Annual Business Inquiry, Office for National Statistics, December 2005.

Workers (2004)

Sub-sectors	Number of self-employed workers in the sector	Number of employees in the sector	Number of employees in the sector/ total number of employees in the country –all sectors- (%)	Number of employees in companies ‹10 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 10-49 workers in the sector/ number of employees in the sector (%)	Number of employees in companies 50-249 workers in the sector/ number of employees in the sector (%)	Number of employees in companies ›249 workers in the sector/ number of employees in the sector (%)
Total of the sector	ND	8,000	0.03%	ND	ND	ND	ND

Source: Annual Business Inquiry, Office for National Statistics, December 2005.

There is no data available on evolutions and trends in the sector.

2. Description of the Organisations Activities in the Sector at National Level

2.1. Description of the workers' organisations in the sector

a) Transport and General Workers' Union - TGWU

The TGWU was founded in 1922 and it has 820,118 members across all sectors. There is no data on the number of staff employed. Its roots lie in the transport sector, but it has grown considerably through mergers with other unions into one of Britain's largest trade unions covering a wide range of occupations and economic sectors. The Docks, Waterways and Fishing Trade Group are an amalgamation of two trade groups, which have played a historic role in the life of the union. It is funded by members' subscriptions. Most port-based or coastal maritime activity, as well as the British Waterways canals, are all organised by the TGWU which by virtue of its dominance in this sector is actually the biggest maritime union in British waters, uniting masters and ratings. About half the trade group is in the Waterways section and data on the number of members in the fishing industry is unavailable.

The TGWU is reciprocally recognised. It has not replied to emails or phones calls and therefore did not demonstrate interest in participating in the research. As the employers' organisations affirmed that there is no CB in the sector, it seems clear that this organisation does not take part in consultations for the sector. They may take part in consultation in the maritime section but not in the fishing group. At national level, TGWU is affiliated to Trade Union Congress (TUC).

Workers' organisation

Organisation (English name)	Members		Estimation of the density	CB (Yes/No)	Affiliations	
	Total number of the members of the organisation	Number of members who are working in the sector of Fishing Industry			European affiliations	Others affiliations
Transport and General Workers' Union - TGWU	820,118	ND	ND	No	ETF	ND

Source: union websites and communications with the unions.

2.1. Description of the employers' organisation activities in the sector

The biggest and most important employers' organisations in the Fishing Industry -more specifically in the catching sector- are the following.

National Federation of Fishermen's Organisations – NFFO
The NFFO was founded in 1977 and is the representative body for fishermen in England, Wales, Northern Ireland and the Channel Islands. It is funded by member's subscriptions. The NFFO is constituted by 46 organisations and associations members. Most of the companies are small and family owned enterprises. The NFFO has 7 employees working for the Federation.
This organisation is recognised as a voluntary association. As there is no bipartite or tripartite CB for the Fishing sector, this organisation does not negotiate collective agreements over pay or take part in consultations at any level for this sector. The organisation negotiates on behalf of the sector on issues related to quotas, licences and technical measures at national level for England and Wales. At national level, the NFFO is affiliated to the North Sea Regional Advisory Council (NSRAC) and the North Western Waters Regional Advisory Council (NWRAC).

Scottish Fishermen's Federation – SFF
The Scottish Fishermen's Federation was formed in 1973 to preserve and promote the collective interests of Fishermen's Associations. It is funded by member's subscriptions and has 10 employees on its staff. The Federation plays an active role in advancing the interests of Scottish fishermen at national and international levels by lobbying government officials in Edinburgh, London and Brussels. The Federation also plays an important role in helping to inform fisheries science, marine environment management, inshore fisheries management; marine safety regulations and industry training/recruitment programmes. The Federation has 8 constituent Association members: Anglo-Scottish Fishermen's Association; Clyde Fishermen's Association; Fish salesmen's association (Scotland) Limited; Malling and North-West Fishermen's Association; Orkney Fisheries Association; Scottish Pelagic Fishermen's Association Limited; Scottish White Fish Producer's Association Limited; and Shetland Fisherman's Association.
This organisation is recognised nationally as the leading Trade Association at sector level for the Fishing Sector. As there is no bipartite or tripartite CB for the Fishing sector, this organisation does not negotiate collective agreements, over pay, or take part in consultations at any level for this sector. The SFF does not negotiate for employees' conditions. It represents the employers in lobbying for maximum sustainable fishing opportunities (quotas, licences and technical measures) at national level in the Scotland. At national level, the SFF is affiliated to NSRAC, NWRAC and the Pelagic Regional Advisory Council (Pelagic RAC).

Employers' organisations

Organisation (English name)	Members		Estimation of the density	Collective Bargaining (Yes/No)	Affiliations	
	Total number of companies that are members of this organisation	Total number of workers who are working in the companies members of this organisation			European affiliations	Others affiliations
National Federation of Fishermen's Organisations – NFFO	46	ND	46/3,402 = 1.4%	No	Europêche	-
Scottish Fishermen's Federation – SFF	8	ND	8/3,402 = 0.2%	No	Europêche	-

Source: Companies' websites, 2006.

3. Description of the Bipartite SD in the Sector

3.1. Description of the tripartite activities and concertation in the sector

The UK Fishing Industry is administered by the Fisheries Departments which are comprised of the Department for Environment, Food, and Rural Affairs (Defra), the Scottish Executive Environment & Rural Affairs Department (SEERAD), the National Assembly for Wales Agriculture Department (NAWAD), and the Department of Agriculture and Rural Development for Northern Ireland (DARD). Departments in the Isle of Man, Jersey and Guernsey are responsible for administering fishing activity in their respective areas.

There are no tripartite activities in the sector. However, employers' organisations work closely with the Fisheries Departments in the UK contributing with the improvement of the Common Fisheries Policy (CFP). The primary aim of CFP is to ensure rational and sustainable exploitation of fish stocks through conservation and management policies designed to protect resources and reflect the needs of the fishing industry. Structural policies are aimed at improving the balance between catching capacity and available resources by addressing fishing effort. Conservation policies are aimed at regulating the quantities of fish caught, through a system of Total Allowable Catches (TACs) based on scientific advice. These TACs are allocated as quotas to Member States in accordance with fixed keys based on historic fishing rights. They are complemented by a series of technical conservation measures intended to achieve more selective fishing, for example by setting rules on minimum landing sizes, minimum mesh sizes and gear design, as well as defining areas of seasonal closures, methods of fishing and target species. Opportunities to fish in third country waters are also secured through the CFP[227].

3.2. Description of the SD in the sector at national level.

a) At sector level

The Fishing sector is characterised by a share fishing structure which means that remuneration is based on the share of the catch. The employer/employee relationship associated with CB over pay does not exist. Employers' organisations such NFFO and SFF may negotiate on behalf of the sector in terms of quotas of fishing in selected areas, licences, technical measures and structural policies. In terms of SD at sector level, data on collective agreements signed are unavailable, as well as on the players' positions with regard to future developments in the SD at sector level in the sector of Fishing Industry. There is no CB at company level, nor at site level.

Employer/employee relationship associated with CB over pay is not the only kind of collective agreements which does interest us, as employers' organisations such NFFO and SFF may negotiate on behalf of the sector in terms of quotas of fishing in selected areas, licences, technical measures and structural policies. There is no obligation to participate at CB at sector level and there is no conflict between players regarding recognition issues.

b) At company and site levels

There is no CB at these levels.

There is no data on the existence of players who, although not recognised by the dominant players or by public authorities, must be regarded as playing a role in industrial relations at sector or company levels, on the existence of a multi-employers bargaining that does not correspond to the sector and on the evaluation of the bipartite SD at sector level (obstacles to its development, promotion of the bipartite SD at the sector level).

Comment

In 2004, the Fishing Industry in the UK had 6,641 fishing vessels, with a further 389 vessels registered in the Channel Islands and the Isle of Man. Some 654 thousand tons of sea fish were landed into the UK and abroad by the UK fleet with a total value of £513 million. In addition, the UK imported some £1,473 million fish. The UK also exported fish and fish products to the value of £881 million. The UK has a substantial fish processing industry of around 573 businesses, which employ some 18,180 people. At retail level, there were approximately 1,300 fishmongers in the year 2004, including mobile fish vans and market stalls. 87.5 percent in volume and 87.7 percent in value, excluding canned produce was sold through supermarkets. Fish is also consumed in restaurants and in take away form, from fish and chip shops. A small proportion of the catch is used to make fish oils and animal feeds. Some of the species caught by UK fishing vessels find a better market abroad and these species are usually exported or landed directly abroad. In 2004, UK vessels landed directly into non-UK ports 192 thousand tons of sea fish with a value of £107 million.

[227] Source: United Kingdom Sea Fisheries Statistics 2004. Defra.

ANNEX

A. References*

*Besides the interview of organisations' representatives (see B. Validation).

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The Netherlands

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Poland

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Portugal

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Slovak Republic

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Spain

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The United Kingdom

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B. VALIDATION

B.1. National validation

Belgium

Name of the organisation consulted	Name of the person consulted
CSC/AVC Transport & Communications	De Smedt C.
UBOT/BTB	Victor I.
GGSLB	Seghin
Rederscentrale-Beroepsvereniging van de Belgische Reders	
Beroepsvereniging der Visgroothandelaars van België	Couvreur G.

Cyprus

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations (PEO)	Mr Christos Christofi	District Organisation Secretary
Federation of Transport, Petroleum and Agricultural Workers of Cyprus (SEK)	Mr Pandelis Stavrou	Secretary General
Department of Fisheries and Marine Research	Mr.Savvas Kanios	Senior Officer
“	*Mr* Yiannos Kyriakou	Senior officer
Statistical Service of Cyprus	Mr Damianos Pitiris	Senior Officer
Multipurpose Fishing Vessels Association	Mr Panicos Loizides	President
Cyprus Chamber of Commerce and Industry	Mr Vasilis Vasilades	Officer in charge of the Pancyprian Association of Fish Farming
Panagrotikos Farmers Union	Mr Koulis Papachristoforou	Secretary General

Czech Republic

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Odborový svaz pracovníků zemědělství a výživy - Asociace svobodných odborů České republiky (Union of Workers in Agriculture and Alimentation – Association of Free Trade Unions of the Czech Republic)	Ing. Ivan Kašpar Ing. Naďa Pikierská, CSc	sociálně právní oddělení, pracoviště Praha (legal and social department, Prague workplace) oddělení analytiky, pracoviště Praha (department of analytics, Prague workplace)
Odborový svaz pracovníků dřevozpracujících odvětví, lesního a vodního hospodářství v České republice (Trade Union of Workers in Woodworking Industry, Forestry and Management of Water in the Czech Republic	Mgr. Pavel Kunc	sociální problematika, ústředí (social problems, headquarters)

Denmark

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
3F, United Federation of Danish Workers, Fagligt Fælles Forbund	Henrik Berlau	negotiation secretary
DFA, Danish Fishermen’s Association, Danmarks Fiskeriforening	Niels wichmann	Adm. Director
FM, Association of Fishmeal and Fish oil Manufacturers in Denmark, Foreningen for Danmarks Fiskemels- og Fiskeolie industri		
The Danish Directorate of Fisheries, Fiskeridirektoratet		

Estonia

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
The Estonian Fishermen’s Association (Eesti Kalurite Liit, EKL)	Andres Varik	The chairman of the EKL
The Estonian Fish Farmers Association (Eesti Kalakasvatajate Liit, EKKL)	Aivar Pehme	Executive Director of EKKL
The Estonian Chamber of Agriculture and Commerce (Eesti Põllumajandus-Kaubanduskoda, EPKK)	Maire Vimb	Administrative Assistant of EPKK

Finland

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Finnish Fishermen’s Association	Kim Jordas	Managing director

France

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
CFTC	M. Jacques Bigot	Secrétaire Général du Syndicat National
CFDT	M. Sylvie Roux	
FO	M. Hédou Mme Sophie Boissonnade	Secrétaire general, et chargée de secteur
UAPF	Mme Dion	Chargée des relations sociales
CMCM	Mme Boudigou	Chargée des relations sociales
CGT		

Germany

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Ver.di Cuxhaven	Gunnar Wegener	Trade union secretary for the fishing industry
Bundesverband der deutschen Fischwirtschaft (Federation of the German Fish Industry)	Dr. Matthias Keller	Manager/Director

Greece

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
PEPMA	Mr. D. Taoultzis	President of the Administrative Council
PASEGES	Ms. M. Papadopoulou	Member of the scientific staff charged with fishing
POA	Mr. St. Plakidis	President of the Administrative Council
SAE	Mr. Xen. Yalvalis	President of the Administrative Committee

Hungary

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
MEDOSZ	Dr. András Bereczky	General Secretary
Balatoni Halászati Rt.	László Varga	Secretary

Ireland

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Irish Fishermen’s Organisation	Joe Maddock	President
Irish Fish Producers’ Organisation	Lorcan Ó Cinníede	Chief Executive
Killybegs Fishermen’s Organisation	Sean O’Donoghue	Chief Executive
South and West Fish Producers’ Organisation	Mike Fitzgerald	--

Italy

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
FLAI-CGIL	MININNI, Giovanni	National Coordinator of the Fishing Sector
FAI-CISL	ORSOMANDO, Francesco	National Coordinator of the Fishing Sector
UILA-UIL	MAJRONE, Guido	General Secretary of the Fishing Sector
	DE PASCALE, Fabrizio	National Secretary of UILA Pesca Press Office Responsible of UILA
Federpesca	PERONI, Corrado	Vice-Director
	PAVIA, Armando	Responsible for Insurance and Labour
Federcoopesca	FABRI, Alessandra	Press Office
Lega Pesca	WIEDENSTRITT, Serena	Press and Communication Office
AGCI Agrital	DE ROSA, Raffaella	Director
FESICA-Confsal	MARIANI, Bruno	General Secretary
UNCI Pesca	AMICO, Pasquale	President

Latvia

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Latvian Fish and Food Industry Workers' Union (LFFIWU)	Ms Maija SMILA	Chairperson
Latvian Fisheries Association (LFA)	Mr Inarijs VOITS	President
Latvian Fisheries Federation (LFF)	Mr Evalds URTANS	Chairperson
Fishermen's Association of Kurzeme Region (FAKR)	Ms Sandra BUNKA	-

Lithuania

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Fishing Business Association	Gintautas Morkevicius	Chair
Baltic Fisher	Algirdas Ausras	Chair
Lampetra	Virginijus Domarkus	President

Malta

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Koperattiva Nazzjonali tas Sajd (National Cooperative of Fishing)	Bugeja Raymond	Secretary
Ghaqda Koperattiva tas-Sajd Ltd. (Fishing Cooperative)	Farrugia Michael	Chief Executive Oficer
Board of Cooperatives	Casaru Marceline	Administrative Officer
Board of Coopertaives	*Fabri Vincent*	Supervisory Official

The Netherlands

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Commodity Board of the Fishery Sector (*Productschap Vis)*	Mr. R. Luns	Staff member
Rederij Vrolijk, member of the RVZ, representative in CB	Mr. M. van der Zwan	Staff member
RVZ	Mr. C. Blonk	Staff member
CNV Bedrijvenbond	Mr. T. de Jong	Administrator fishery sector
FNV Bondgenoten	Mr. Jacob de Vries	Administrator fishery sector
SNV	Mr. H. Demkes	Staff member

Poland

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Trilateral Team for Sea Shipping and Sea Fishing	Ewa PIOTROWSKA	Secretary

National maritime Section NSZZ Solidnosc – Fisheries dept.	Henryk STACHOWIAK	Assistant of the President
Seamen & Fishermen Trade Union Federation	Boleslaw ZASADA	Vice-President
Seamen and Fishermen Trade Union	Krzysztof ROSTKOWSKI	President
Association of Fishermen of Zalew Szczecinski, Zalew Kamienski and Jezioro Dabie	Czeslaw BROCHWICZ	Vice-President
DALMOR Joint-Stock Company	Krzysztof RYCHLICKI	President/General Director
PPi UR SZKUNER – Fishery and Fishing service enterprise	Slawomir PAWLAK	
Ministry of Agriculture and Rural Developement – Department of Fisheries	Lidia KACALSKA-BIENKOWSKA	
Ministry of Agriculture and Rural Developement – Department of Fisheries	Bartlomiej PRZEMYCKI	

Portugal

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
ADAPI	António Cabral	General Secretary
SINDEPESCAS	Manuel Marques	General Secretary
SOEMMM	Rogério Pinto	President
Fpescas	Frederico Pereira	General Secretary
UGT/Pescas	João Carlos Ramos	General Secretary
FESMAR	João de Deus Pires	President
SEMM	João de Deus Pires	President
FSM	Graco Trindade	Director

Slovak Republic

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Trade Union of Workers	Frantisek BALAZ	President
Slovak Association of Fishermen	Peter MAKARA	Union Representative

Slovenia

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Food Industry Association	Tatjana Zagorc	Secretary of the Association
Section on Agriculture and Food Industry	Nevenka Murn	Member of the Section and leader of the negoating team
Trade Union of Agriculture	Jovo Labanac	Secretary General
Trade Union of Agri-Foodstuffs Industry of Slovenia	Euro Brozič	Executive Secretary
Chamber for Agriculture and Forestry of Slovenia	Boris Grabrijan	Deputy Director

Spain

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
ARVI (Cooperativa de Armadores de Pesca de Vigo)	José Antonio Suárez Llanos	Director Gerente
UNACOMAR (Unión Nacional de Cooperativas del Mar)	Antonio Marzoa	Presidente
UCOMAR (Unión Comercial Marítima)	Ricardo Marzoa	Presidente
FEABP (Federación Española de Armadores de Buques de Pesca)	Maria José González	Secretaria General
FEOPE (Federación Española de Organizaciones Pesqueras)	Javier Garat	Secretario General
Federación Nacional de Cofradías de Pescadores	Juan Cervantes Flores	Presidente

CIG	Xavier Aboi Pérez	Responsable Sección Mar
LAB	Ramon Fanlo	Responsable de Transporte y Mar
ELA-HAINBAT	José Luís Treku	Responsable de Pesca
CCOO-FCT	Juan Manuel Trujillo	Responsable de Organización
UGT-FETCM	José Manuel Pérez Vega	Responsable Área Interna

Sweden

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
Sveriges Fiskares Riksförbund-SFR (The Swedish Fishermen's Federation	Fredrik Lindberg	Délégué
Fiskeriverket (The National Board of Fisheries	Patrik Persson	Responsable de la Division de la gestion des ressources

The United Kingdom

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
TGWU	Roger Sealey	Researcher
SFF	Bertie Armstrong	Chief Executive
NFFO	Barrie Deas	Chief Executive

B.2. European validation

Name of the organisation consulted	Name of the person consulted	Function of this person in this organisation
ETF	Philippe Alfonso	Political Secretary for the Fisheries, Ports & Docks and Maritime Sections
ETF	Livia Spera	Assistant for Fisheries and Ports & Docks Sections
EUROPECHE	Guy Vernaeve	Secretary General
COPA-COGECA	Guy Vernaeve	Head of Unit