



## IndustriALL Global Union World Conference on Shipbuilding-Shipbreaking

### Background & Key Points

10-11 November, 2014  
Huis Ten Bosch, Nagasaki Prefecture, JAPAN  
Kan Matsuzaki- IndustriALL Global Union



## Building Unity and Power

IndustriALL was founded on 19 June 2012



115 countries  
355 unions  
20 million workers



100 countries  
200 unions  
25 million workers



110 countries  
217 unions  
10 million workers



**140 countries  
50 million workers  
over 400 unions**





## List of industrial sectors within IndustriALL's jurisdiction

Industrial Sectors(15)	
Aerospace	Automotive
Base metals	Chemical, Pharmaceutical and Bio-science
Energy	Industrial and Environment Services
Glass, Ceramic, Cement and Associated Industries	ICT, Electrical and Electronics
Mechanical engineering	Mining and DGOJP
Pulp and Paper	Rubber
Shipbuilding and Shipbreaking	Textile, Leather, Garment Shoes and Textile Services
Service and Miscellaneous Industries	
Cross Sectoral groups(2)	
Women	Non-Manual

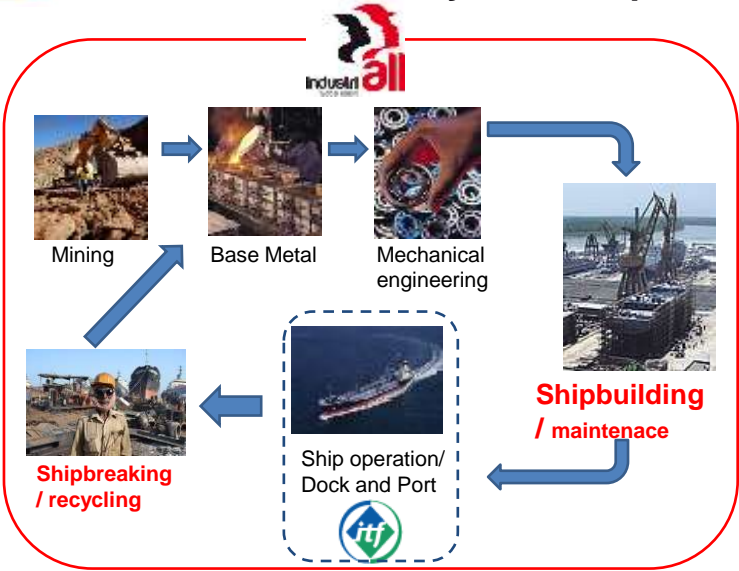


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## Life Cycle Approach: Representing manufacturing workers in the life cycle of ship



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## Shipbuilding(-shipbreaking)Meetings from 2005 to Present

Year	Place	Participants by countries
2005 Nov. - AG	Tokyo, JAPAN	Brazil, Europe, Japan, South Korea, UK, USA
2006 Nov - AG	Washington, USA	Brazil, Finland, Japan, South Korea, Turkey, UK, USA
2007 June - AG	Mumbai, INDIA	Finland, France, India, Japan, UK
2008 - AG	Singapore	Finland, France, India, Japan, South Korea, Singapore, UK
2009 - AG	Hanoi, VIETNAM	Denmark, India, Japan, South Korea, UK, USA, Vietnam
2010 Dec. - AG	Seoul, KOREA	22 participants and 2 guest speakers from Denmark, Finland, Germany, India, Japan, South Korea, USA
2011 Sept. – Conference with EMF	Istanbul, TURKEY	45 participants, 19 unions and 9 organizations from Brazil, Taiwan-ROC, Denmark, Finland, France, Germany, India, Italy, Japan, Netherland, Norway, Pakistan, Spain, Turkey
2012 Nov. - AG	Rio de Janeiro, BRAZIL	26 participants, 9 unions from Brazil, Chile, Denmark, France, India, Japan, South Korea, Netherlands, and Norway
2013 Nov. - AG	JØRLUNDE, Denmark	48 participants, 21 unions , 2 organizations from Australia, Brazil, Chile, Denmark, Finland, France, Germany, India, Italy, Japan, South Korea, Netherlands, Norway, Singapore, Spain, Taiwan, UK and USA
2014 Nov. - WC	Nagasaki, JAPAN	84 participants, 24 unions , 1 organization, 1 government from Australia, Bangladesh, Belgium, Brazil, Denmark, Finland, France, Germany, India, Indonesia, Japan, South Korea, Netherlands, Norway, Pakistan, Russia, Singapore, Taiwan, UK and USA



### IMF-EMF Global Conference on Safe, Sustainable and Green Jobs in Shipbuilding-Shipbreaking 13-14 September 2011 “creating strategic links between shipbuilding and shipbreaking”

The need for a “life-cycle” approach. Participants of the conference urge companies to consider the recycling of a ship already at the time of its conception and design.

Transfer of good practices between developed and developing countries, particularly in the area of occupational health and safety. Bilateral or multilateral cooperation projects between affiliates are strongly encouraged.

Our global trade union network should be further expanded and intensified. A broader alliance for safe, sustainable and green jobs in shipbuilding-shipbreaking will also be important.

Demand that international regulations on OHS and environment in shipbuilding-shipbreaking be implemented rapidly, including as a minimum and a first step the Hong Kong Convention.

Support schemes which promote green technologies, green products, and provide sustainable employment. Safer, greener ships that are producing less toxic waste and fewer emissions are in the interest of shipbuilding workers, maritime transport workers and shipbreaking workers alike.

Shipbuilding-shipbreaking remains a precarious and hazardous occupation in many regions. Compliance with ILO core labour standards, conventions and agreements is essential and non-negotiable.





## Outcome of the AG 2013 in Denmark priorities for 2014

**Red: not progressed** **Black: in process** **Blue: bit progressed** **Green: progressed**

### **Organizing and Fighting Precarious Work**

•Strengthen and organize precarious workers (especially sub-contracted workers, foreign and migrant workers) and improve their working conditions through collective bargaining.

•Strengthen communication between the unions in the sector on precarious work, **unions will get actively involved in IndustriALL's STOP Precarious Work Campaign.**

### **Promoting a Sustainable Industry**

•Develop IndustriALL's Sustainable Industrial Policy and strengthen activities against the government in cooperation with national centres and other industrial unions in their own countries.

•Contribute to the process of making a new draft code of practice on Safety and Health in shipbuilding and repair developed by the ILO.

### **Creating Trade Union Networks**

•Start mapping MNCs in shipbuilding in the commercial and naval sector to seek possibilities of creating new networks.

### **Women Participation**

•Achieve more than 30 per cent women participation in the meetings and conferences of this sector.

•Improve agenda and programme of the sectoral meetings to attract women participation.



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## IndustriALL's Goals and Key Strategies until 2016

### **1. Build union power throughout the world by –**

- 1.1. focusing on organizing and growth in all its activities and industries
- 1.2. supporting the development of strong, democratic, independent, representative and sustainable trade unions
- 1.3. building unity among workers and unions

### **2. Confront global capital by –**

- 2.1. global corporate leverage campaigning
- 2.2. being a powerful voice for workers at the institutions of global governance
- 2.3. pushing for recognition and global level negotiations with MNCs

### **3. Defend workers' rights by –**

- 3.1. campaigning against attacks on workers' rights wherever they occur
- 3.2. developing and implementing Living Wage strategies in target countries
- 3.3. creating safe and healthy workplaces
- 3.4. building women's participation and leadership

### **4. Fight precarious work by –**

- 4.1. joint affiliate actions against precarious work
- 4.2. limiting use of precarious work
- 4.3. ensuring the labour rights of precarious workers

### **5. Ensure sustainable industrial employment by –**

- 5.1. influencing the shape and purpose of industrial policy development and implementation
- 5.2. building a shared affiliate view of sustainable industrial policy
- 5.3. building affiliates' capacity to develop and implement their own vision of sustainable industrial development



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# Section 1: Global Overviews in Shipbuilding and Shipbreaking Industries

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## Trends in Shipbuilding Industry 1

Recovery after economic crisis.  
The orders in 2013 were the 2nd highest ever.

### World New Orders

Country	2009		2013	
	'000GT	share	'000GT	share
Japan	8,509	25.3%	13,400	13.2%
S. Korea	8,522	25.4%	35,906	35.4%
China	14,947	44.5%	42,971	42.4%
Europe total	521	1.6%	1,151	1.1%
Brazil	42	0.1%	180	0.2%
Singapore	15	0.0%	8	0.0%
Taiwan	264	0.8%	1,019	1.0%
USA	27	0.1%	659	0.6%
India	39	0.1%	46	0.0%
Philippines	604	1.8%	3,473	3.4%
Turkey	73	0.2%	142	0.1%
Vietnam	66	0.2%	1,136	1.1%
World total('000GT)	33,600		101,434	



1. Data Source: The Shipbuilders' Association of Japan(SAJ)  
2. Ship Size Coverage: 100 Gross Tonnage and over  
3. Europe Total = Former AWES(present SEA Europe)

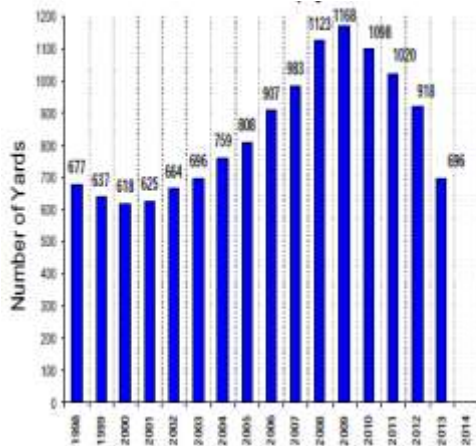
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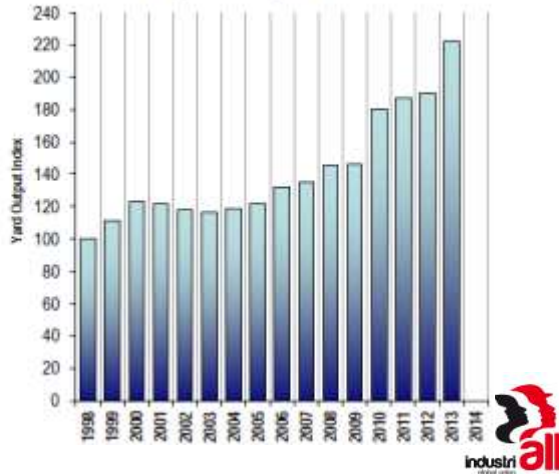
## Trends in Shipbuilding Industry 2

Number of active shipyard decrease and  
Average yard produces 50% more than in 2009

Number of Active Shipyards



Average Yard Output 1998-2013



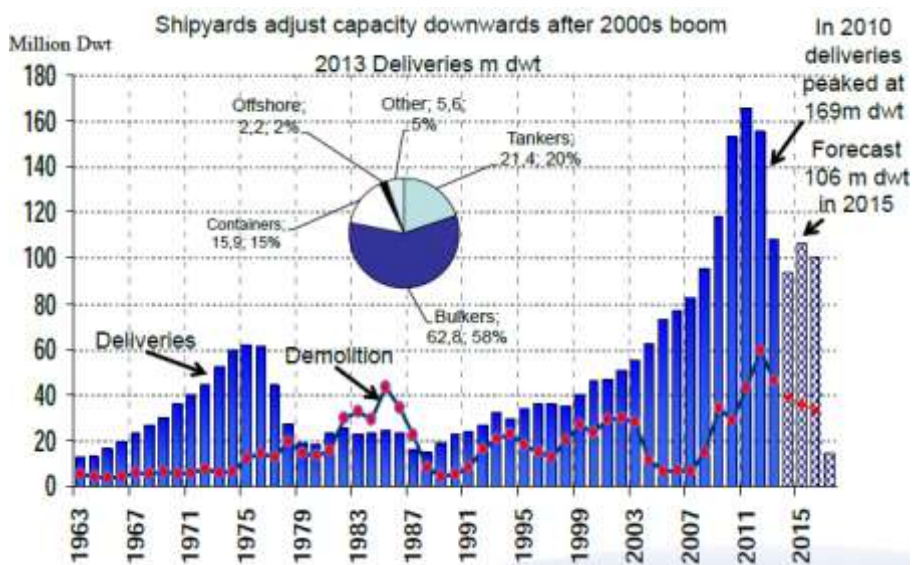
Source: Presentation by Martin Stopfort@ SMM 2014

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## Trends in Shipbuilding Industry 3

Forecast predicts downwards trends in next 5 years



Source: Presentation by Martin Stopfort@ SMM 2014

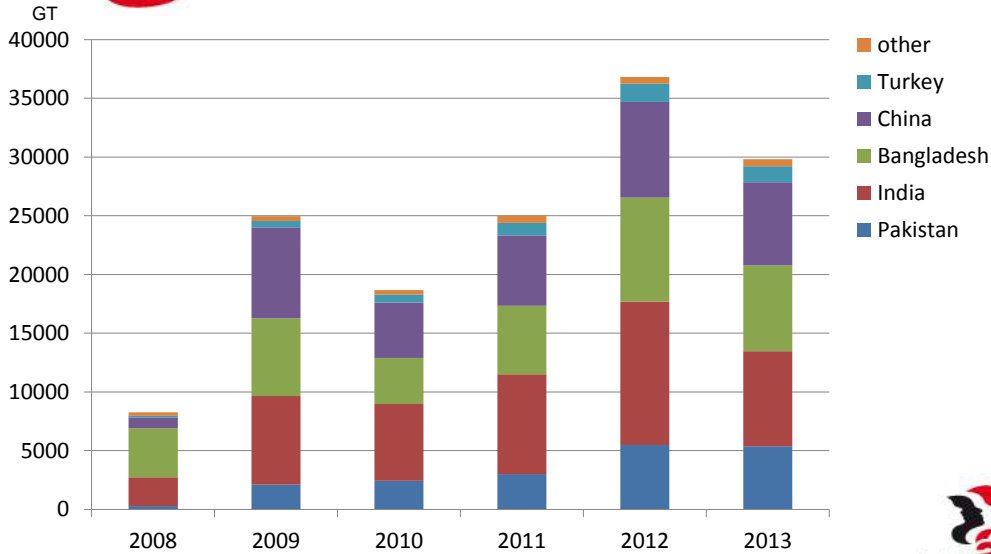
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# Shipbreaking by Countries

South Asia region- India, Bangladesh, and Pakistan account 70% of world shipbreaking in gross tonnage.



Source: "Shipbuilding Statistics" September 2014, the Shipbuilders' Association of Japan



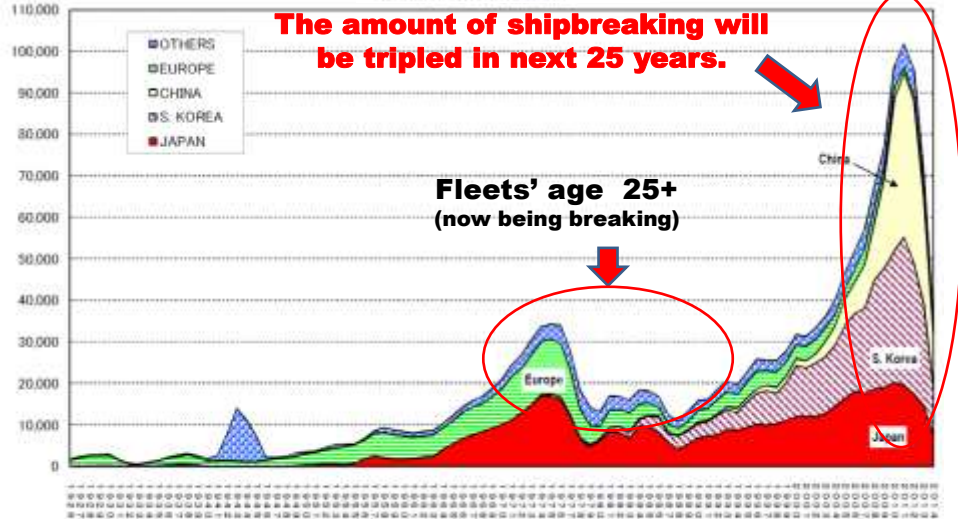
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# Shipbreaking will continue to increase

## WORLD COMPLETIONS

(1926 ~ 2014 1st Half)



(Note) 1. Data Source : IHS (Former Lloyd's Register). Until 1967, launched base. After 1968, delivered base.  
2. Ship Size Coverage : 100 GT and over.

Source: "Shipbuilding Statistics" September 2014, the Shipbuilders' Association of Japan



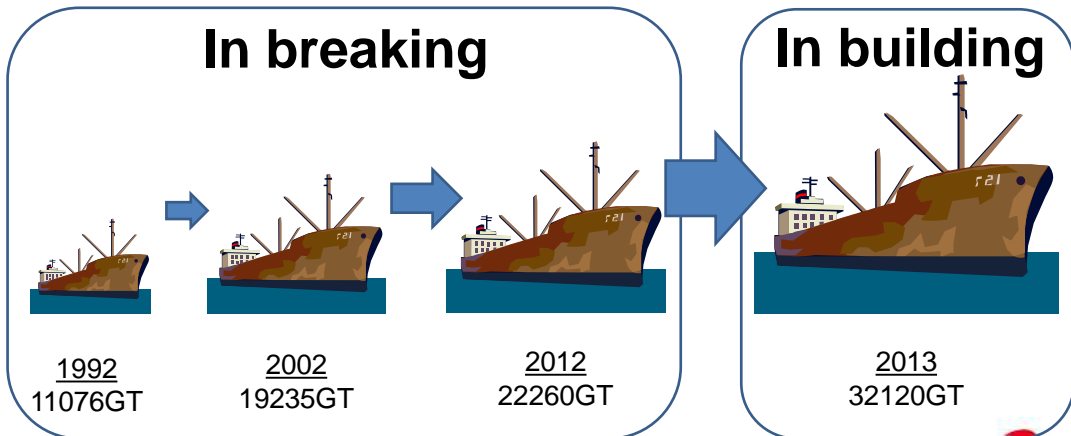
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## Bigger sized ships to be broken in the future

### Average size of ship



Average age of ships sold for shipbreaking is 25-30 years

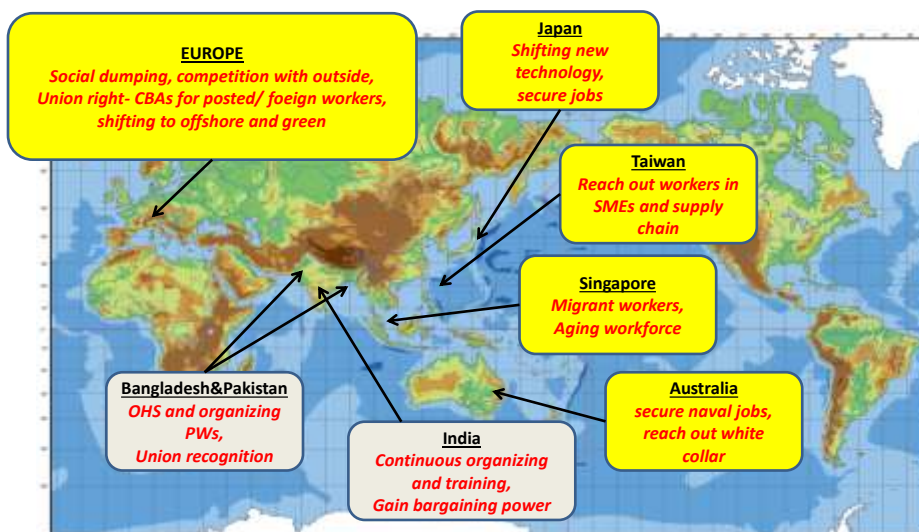


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## Outcome of Survey 2013 Global situation on Shipbuilding- shipbreaking workers – Key Words



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## Section 2: Organizing and Fighting against Precarious Work

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### Compliance with Core Labour standards: Ratification of ILO fundamental Conventions by major shipbuilding-shipbreaking countries

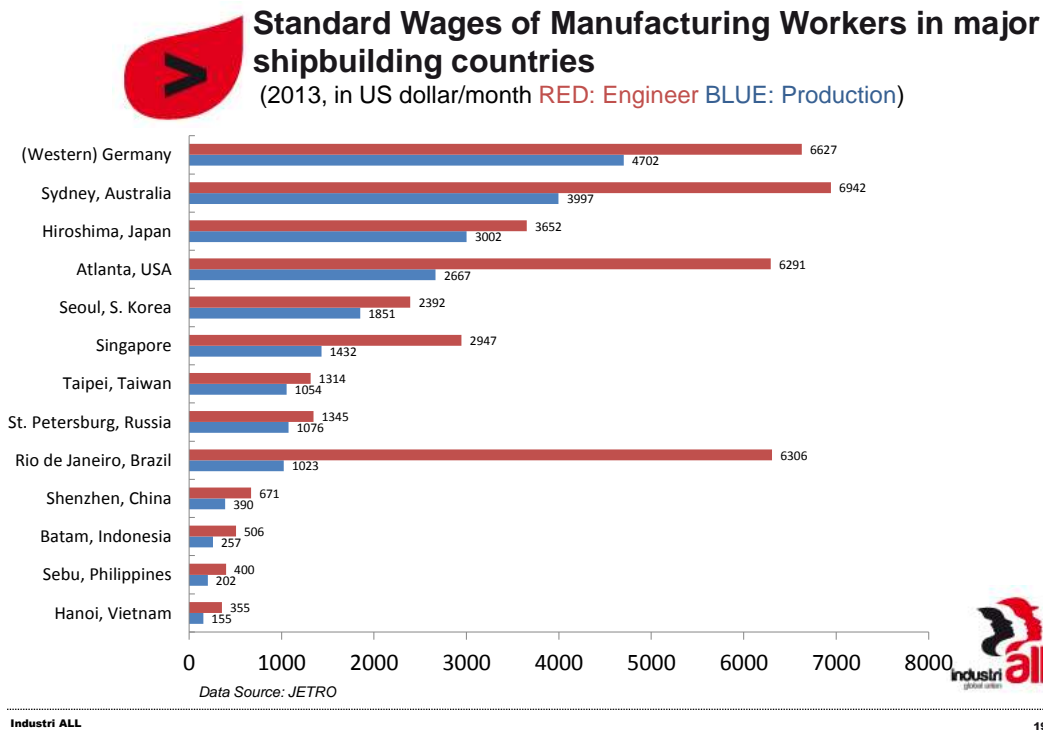
Country	Freedom of association		Forced labour		Discrimination		Child labour	
	C087	C098	C029	C105	C100	C111	C138	C182
<a href="#">EU</a>								
<a href="#">Turkey</a>								
→ <a href="#">Brazil</a>								
<a href="#">Australia</a>								
<a href="#">Bangladesh</a>								
→ <a href="#">China</a>								
→ <a href="#">India</a>								
<a href="#">Indonesia</a>								
<a href="#">Japan</a>								
→ <a href="#">Korea, Republic of</a>								
→ <a href="#">Malaysia</a>								
<a href="#">Pakistan</a>								
<a href="#">Philippines</a>								
→ <a href="#">Singapore</a>								
→ <a href="#">Viet Nam</a>								
→ <a href="#">USA</a>								

source: ILO NORMLEX

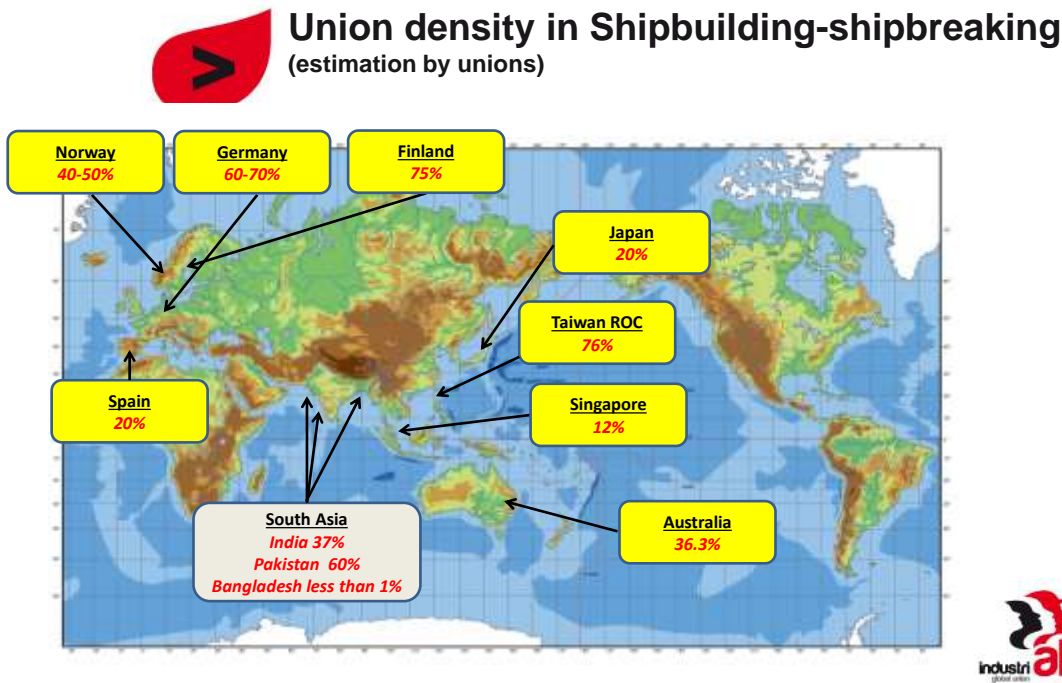


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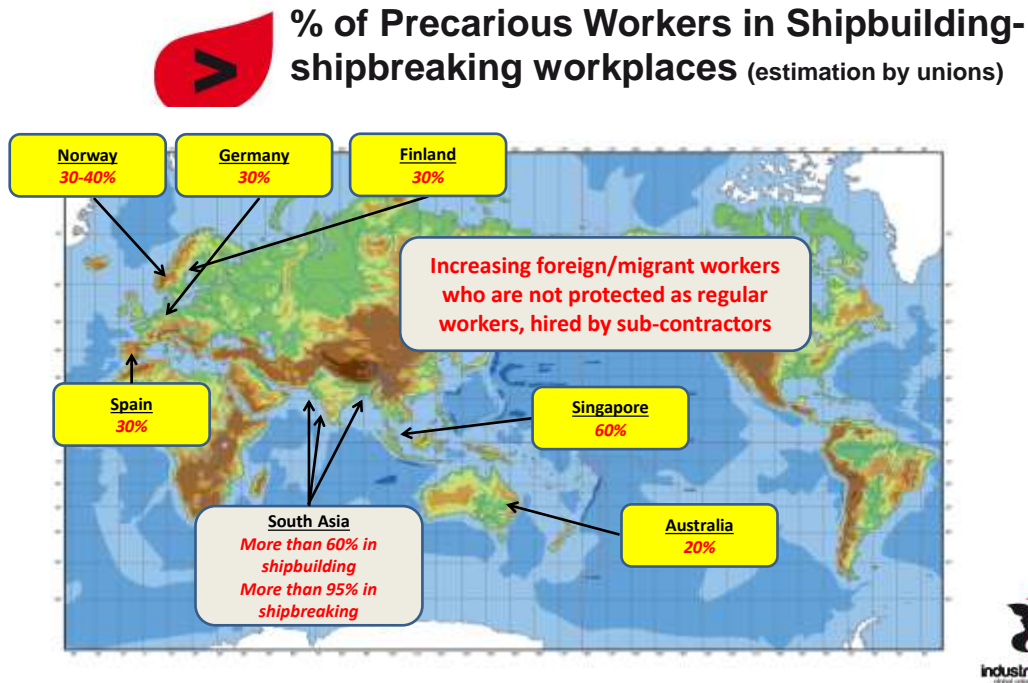
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## Negotiating Security

Trade union bargaining strategies against precarious work



Sub-contracting and outsourcing: how companies escape their responsibilities

### OIL INDUSTRY IN NIGERIA:

In Nigeria, multinationals and oil service companies outsource a very large proportion of their workforce to unlicensed labour contractors, notwithstanding that the jobs are continuous, routine and permanent in nature. The user companies supervise the workers and determine their salaries. They only transfer payments to the labour contractors.

### SHIPBUILDING IN GERMANY:

"Companies tend to hand over their responsibilities and do not bother monitoring what their subcontractors are getting up to. Moreover, the subcontractor they have signed the agreement with will then pass the work on to sub-sub-subcontractors. In the end, companies no longer have the slightest idea of who is working on their premises. [...] The subcontractors make a tidy profit for themselves at the expense of the workers"

Melhard Galken in charge of IG Metall's Coastal District

### MINING IN MADAGASCAR:

In July 2013, GMM (Gt Madagascar Minerals-Rio Tinto) ended its contract with the security company OMEGA Risk Solutions in favour of two cheaper companies. This resulted in the collective dismissal of 300 workers, terminated with only one month's notice. IndustriALL affiliate FISEMA tried to negotiate severance benefits with GMM/Rio Tinto but the company refused to take responsibility for the workers, on the basis that it was not the employer.

## Bargaining levels

- Sectoral bargaining
- Enterprise bargaining
- Negotiating with agencies and contractors
- Global bargaining



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## Special Session: Securing Jobs and OSH for future Shipbreaking Industry



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## No. of Shipbreaking Workers and unions in South Asia Region



Over **130,000** shipbreaking  
workers in South Asia region.



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One of the most hazardous occupations in the world  
**Most of the shipbreaking workers do not know their basic workers' rights**



Freedom of Association ?



Health and Safety ?

Collective Bargaining ?



Training/ Education ?



**Indecent wage, Accidents, No Drinking Water,  
 No PPEs, Undocumented migrant workers.....**



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**Organizing Shipbreaking Workers in South Asia**  
**Organizing-OHS project with FNV**



**INDIA**

Stepping up to sustainability of unions

Continuous training on OHS and trade union activities  
 Achieving tripartite dialogue and collective bargaining



**BANGLADESH**



**PAKISTAN**

Initial stage to organize the workers

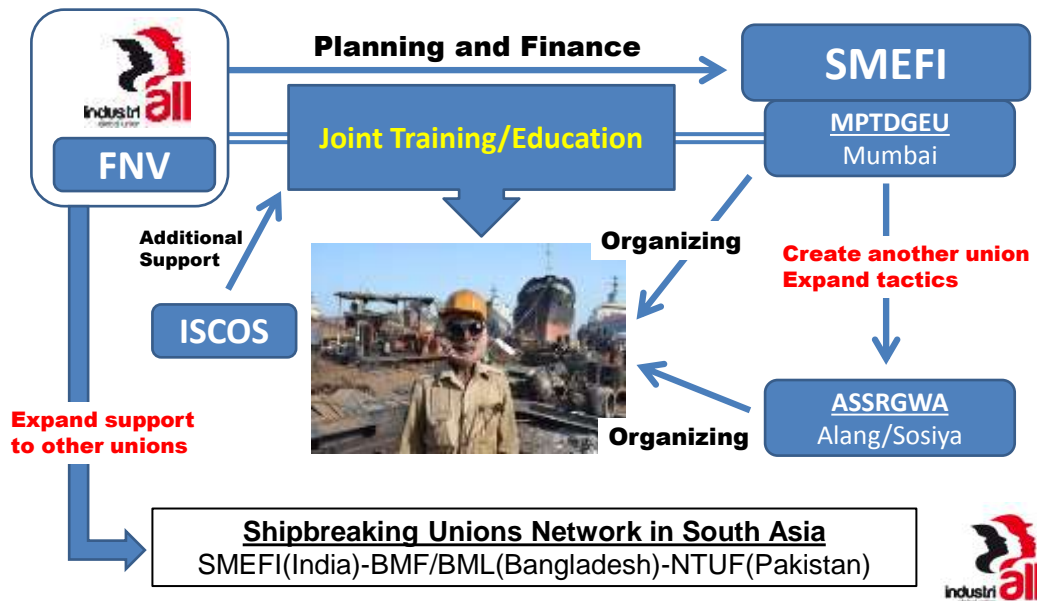
OHS: Safe drinking water, PPEs, First Aid, Hospital, etc  
 Union rights: raising awareness and training  
 Union recognition: fight for union busting



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## Example of creating local unions in India



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Unions' focal points on International regulations and **the Hong Kong Convention**

“Ship Recycling Plan”

Inventory of Hazardous Materials

Ensure the availability of relevant technology equipment and facilities



Train personnel

Effective implementation

**Social Dialogue**  
**Collective Bargaining**

**Secure safer workplace**  
**Secure sustainable employment/decent work**

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## International regulations and The Hong Kong Convention

Date	Types
May 1992	UNEP: "Basel Convention" into effect
Dec. 2002	UNEP: issued "Technical Guidelines for the Environmentally Sound Management of the Full and Partial Dismantling of Ships"
Oct. 2003	ILO: issued "Safety and Health in shipbreaking: Guidelines for Asian countries and Turkey"
Dec. 2003	IMO: issued "Guideline on Ship Recycling"
May 2009	IMO : "the Hong Kong International Convention for the Safe and Environmentally Sound Recycling of Ships" was adopted.

### Union's focal points on the HK convention

**Ships** are required to carry an **Inventory of Hazardous Materials**.

**Ship recycling facilities** are required to provide "**Ship Recycling Plan**".

**Parties** are required to **provide technical assistance**:

1. to **train personnel**;
2. to **ensure the availability of relevant technology, equipment and facilities**;
3. to initiate joint research and development programmes;
4. to undertake **other actions aimed at the effective implementation** of this Convention and of guidelines developed by the Organization related thereto.

### The HK Convention

**Adoption: 15 May 2009 , Entry into force: 24 months after ratification by 15 States, representing 40 per cent of world merchant shipping by gross tonnage, combined maximum annual ship recycling volume not less than 3 per cent of their combined tonnage**



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## Main Activities on Shipbreaking workers

- ❖ Expand alliance for **safe and sustainable jobs in shipbuilding-shipbreaking**
- ❖ Support **green technologies**, green products and **sustainable employment**
- ❖ Promote a "**life-cycle**" approach
- ❖ Transfer of good practices: **Bilateral or multilateral cooperation projects**
- ❖ Demand that international regulations on OHS and environment including **the Hong Kong Convention**
- ❖ Demand the governments on compliance with **ILO core labour standards**



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## Section 3: Promoting Sustainable Industrial Policy

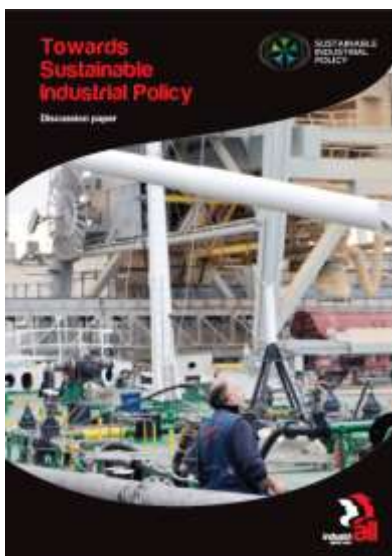
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## Sustainable Industrial Policy

### What does it look like?



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- Promoting equity
- Harnessing technology
- Advancing labour standards
- Building sustainable industry in a globalized world
- Just Transition



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# Industrial policy

**= A plan to encourage desired patterns of industrial development and growth**

- Strategically targets specific industries and sectors
- Considers transportation and communications infrastructures, education and skills, training, research and energy
- Creates a healthy economy and quality employment
- Minimizes negative environmental impacts
- Advances the interests of society as a whole



Title

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## New Technology/Product

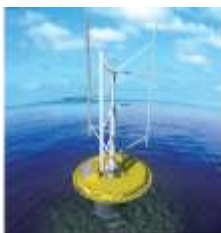
Promoting sustainable technologies/products will bring sustainable employment



Large-Sized Floating Offshore Structure (Mega Float)



Air-lubrication System



MODEC (slowid)  
(Savonius Keel & Wind Turbine Darrieus)

Floating Wind & Current Hybrid  
Power Generation



Super Eco-ship



High Efficiency Propeller



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## Section 4: Creating Trade Union Network and Strengthening Solidarity

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## What is Trade Union Network?

### Principal Function



- Exchange of Information & Experiences
  - Collective Agreements, wages, working hours, shift systems, bonus systems, holidays, retirement schemes
  - Organizing Strategies
  - Occupational Health, Safety & Environment
  - Company Information
- Building Cross-Border Union Solidarity
  - Joint Actions
  - Campaigning
- Implementing an Effective Communication Strategy
- Communication with Central/Regional Management



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## Building Networks

Example of the basic principles to establish a network

1. **A political mandate from the affiliates involved.** A network can be initiated by the IndustriALL or its affiliates, after which a sufficient amount of affiliates need to commit themselves to building and participating in the network.
2. Trade unions in the home country of the MNC play a vital role in establishing a network and in making it function. IndustriALL affiliates with membership in the company should be consulted and involved at an early stage of the process. **The initiative from the union in the home country of the MNC is an important element.**
3. **The networks should be independent union bodies.** From that independent position, they could pursue recognition from the company, including financial support where appropriate, provided they maintain their independence. In some cases, it may be useful to invite other organizations, in particular those that could facilitate communication and cooperation due to their regional and professional knowledge. The decision on inclusion rests with the participants of the network.
4. **The network should also be transparent** and open to all unions that wish to participate with the agreement of the IndustriALL affiliates.
5. Each union itself decides over who participates or not in **the networks recognizing the importance of representation and participation from the shop floor.**
6. An action plan should be developed to set out the objectives, priorities, structure, ways of communication, role of the coordinator, etc. This can be done through a coordination meeting or electronically. There are specific measurable objectives. This can vary from network to network but **should have common denominators as set out in the section on the roles of trade union networks.**
7. **The goal of the network is to increase the power of the unions vis-à-vis the company at the national, regional and global levels.**

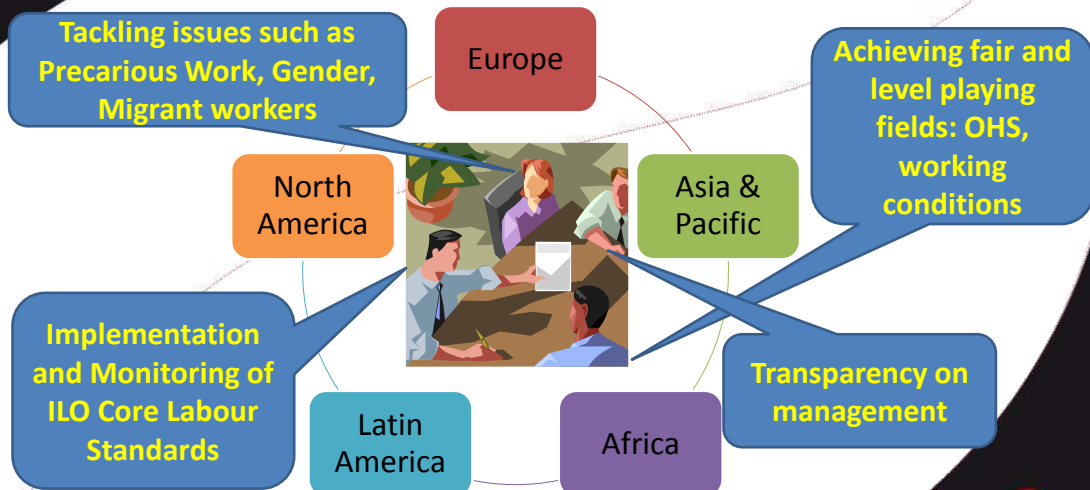


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The network increases the power of the unions vis-à-vis the company at the global levels.



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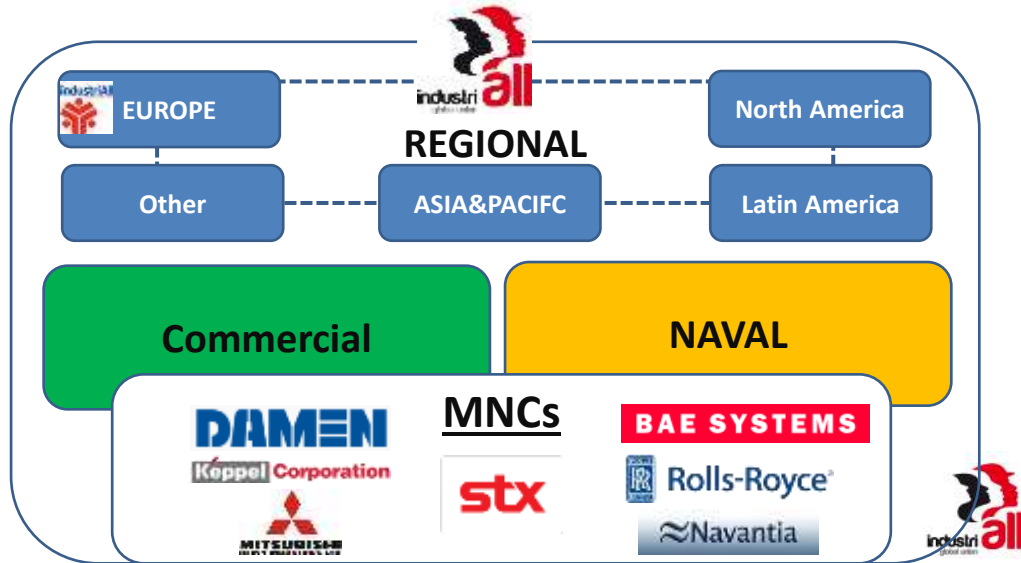
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# Creating Network

What kind of network do we need?



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## Outcome of Survey 2013

(15 unions/12 countries)



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## AUSTRALIA - AMWU

Union density: Metal Industry 21% - Shipbuilding 36.3%

(year Aug. 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	5,713	18.3%	40.8%	2,074	1%	5%
Shipbreaking	-	-	-	-	-	-

### Shipbuilding

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
ASC South SA North SA Henderson Western Australia		100% 100% 100%	2,083	684
BAE Systems Henderson Western Australia Victoria	25% 10%	75% 90%	1,606	535
Thales New South Wales	10%	90%	450	150
Forgacs Newcastle Queensland	20% 99%	80% 1%	1,113	705
Austral Henderson Western Australia			461	0



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## BANGLADESH- BML

Union density: Metal Industry 3% - Shipbuilding/shipbreaking less than 1%

(year 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	22,420	-	-	500	-	-
Shipbreaking	38,680	-	-	220	-	-

### Shipbuilding

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
Chittagong Dry Dock		100%		500
Karnafuli Ship Builders	30%	70%		
Western Fisheries Ship Builders	10%	90%		
F.M.C. Ship yard	5%	95%		
B.N. Dock Yard	5%	95%		
Progressive Ship Yard		100%		
Khulna Dock Yard		100%		
Khaja Ship Builders	5%	95%		
Anand ship	10%	90%		

### Shipbreaking

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
ZIRI Subedar Steel Re-rolling Mills				220
M/S Kabir Steel Ship Yard				
M/S Rising Steel Re-rolling mill				
M/S Janata Holding				
M/S Leasing Enterprse				
C.T. Co. Steel Ship Re-rolling yard				
M.R. Steel Ship Yard				
M/S Mahim Steel Ship braking yard				
Four Star Steel re-rolling Mills				
M/S Dynamic Ship Yard				

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# FINLAND – Finnish Metal, Pro, UIL and TEK

Union density: Metal Industry 80% - Shipbuilding 75%

(year 2012)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	18,000	10%	35%	13,500	10%	35%
Shipbreaking	-	-	-	-	-	-

## Shipbuilding

Name of company	% of workers		Total No. of workers	No. of union members
	Commercial	Naval		
STX Finland Group	95%	5%	2,900	2,300
Technip Offshore Finland Oy	100%		800	650
Arctech Helsinki Shipyard	100%		450	340
Turku Repair Yard Ltd	100%		100	90
Uudenkaupungin tyovene	100%		70	65
Deltamarin Oy (design office)			250	200
Elomatic Marine Engineering Oy			250	200



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# FRANCE

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding/ shipbreaking	70,000					

## Shipbuilding

Name of company	% of workers		Total No. of workers	No. of union members
	Commercial	Naval		
DCNS			12800	
STX France			2000	
CNB			500	
CMN			400	
PIRIOU			350	
OCEA			250	
SOCARENAM			220	



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# GERMANY

(year 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	15,805	10%	17%	-	-	-
Marine&Offshore	68,000	-	-	-	-	-

## Shipbuilding

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
Meyer Werft Group(2 yards)	100	0	3,699	2,445
Thyssen Krupp Marine Systems (4 yards)	0	100	3,429	1,501
Fr. Lürssen Group(6 yards)	70	30	1,747	668
Abu Dhabi Mar(3 yards)	100	0	879	383
Nordic Yards(2 yards)	100	0	1,165	482
Petram Group(3 yards)	100	0	613	453
Rönner Group(3 yards)	100	0	179	85
Flensburger Schiffbaugesellschaft (1 yard)	100	0	771	628
Abeking & Rasmussen (1 yard)	95	5	426	304



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# INDIA - SMEFI

Union density: Shipbreaking 37.14%

(year 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	-	-	-	-	-	-
Shipbreaking	35,000	2.5%	2.5%	13,000	less than 1%	1%

## Shipbreaking

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
SHRI RAM GROUP	These are six major groups are existing in shipbreaking by forming various establishments/ firms in India.			
BANSAL GROUP				
HARAYANA GROUP	-More than 35000 shipbreaking workers working in shipbreaking industry in India.			
JAIN GROUP	-80% of total workforce is distributed in these six groups. Because of casual nature of work and mobility of workers from one plot to another, it is difficult to figure out the company wise membership.			
AGRAWAL GROUP				
PATEL GROUP	-Majority of companies are in commercial business, last Naval vessel break INS SHAKTI in 2011 at Alang Plot No. 28 and Cost Guard vessel in 2012 at Alang Plot No. 29.			



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## JAPAN- JBU/JCM

Union density: Metal Industry 29% - Shipbuilding 20%

(year 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	<b>101,379</b>	9%	19%	<b>100,532</b> (including related industries)	5%	20%
Shipbreaking	-	-	-	-	-	-

### Shipbuilding

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
Mitsubishi Heavy Industries	70%	30%	33,296	33,296
Kawasaki Heavy Industries	80%	20%	12,266	12,266
Japan Marine United	80%	20%	5,316	5,316
Mitsui Engineering& Shipbuilding	80%	20%	5,381	5,381



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## NORWAY- Fellesforbundet

Union density: Metal Industry 40-50% - Shipbuilding 40-50%

(year 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	<b>28,000</b>	15%	-	<b>12,300</b>	-	-
Shipbreaking	-	-	-	-	-	-

### Shipbuilding

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
Kleven	95-100	0-5		
Vard	95-100	0-5		
Ulstein	100			
Fiskerstrand	100			
Kværner	100			
Aibel	100			



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# PAKISTAN

Union density: Metal Industry less than 10% - Shipbuilding 65% - Shipbreaking 70%

(year 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	3,000	1%	4%	900	-	-
Shipbreaking	20,000			(8,000)		

## Shipbuilding

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
Karachi Shipyard	80%	20%	2,000	100
Karachi Dockyard	-	100%	1,000	-

## Shipbreaking

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
(65 Private companies)	100%	-	20,000	(8,000)



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# SINGAPORE - SMEEU

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	20,000	10%	30%	2,400	10%	-
Shipbreaking	-	-	-	-	-	-

## Shipbuilding

Name of company	% of work		Total No. of workers	No. of union members
	Commercial	Naval		
Keppel Shipyard	90	10	-	-
Jurong Shipyard	90	10	-	-
ST Marine	60	40	-	



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## SPAIN - MCA-UGT

Union density: Metal Industry 16% - Shipbuilding 20%

(year 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	<b>15,000</b>	2%	30%	<b>20%</b>	2%	10%
Shipbreaking	-	-	-	-	-	-

### Shipbuilding

Name of company	% of workers		Total No. of workers	No. of union members
	Commercial	Naval		
Navantia			5500	17%
vulcano				
CNN La Naval,Zamacona,Ast. Murueta			600-500-300	40%
Barreras-Metalhsi			130-70	15%-105
freire			66	15%
Astican			120	15%
Metal marin			39	12%
Armon-Astander-Armon			230	



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## TAIWAN-ROC - ROCMU

Union density: Metal Industry 50% - Shipbuilding 76%

(year 2013)

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	<b>3,680</b>	-	-	<b>2,800</b>	10%	33%
Shipbreaking	-	-	-	-	-	-

Name of company	No. of workers		Total No. of workers	No. of union members
	Commercial	Naval		
CSBC Corporation, Taiwan	90%	10%	2800	2800
Jong Shyn Shipbuilding Group	80%	20%	500	0
Ching Fu Shipbuilding Co., Ltd	80%	20%	150	0
Lung Teh Shipbuilding Co., Ltd	95%	5%	180	0
San-Yang Shipbuilding Co., Ltd	100%	0%	50	0
Small size shipbuilding and repair yards (abt. 75 yards)	100%	0%	2000	0



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# Precarious Work 1

Country	% of PW	Issues	Response/CBA
Australia	19.2%	<ul style="list-style-type: none"> <li>PW increased in the past 10 years</li> <li>Uncertain and inability to secure finance(car, house, etc.)</li> <li>Reluctance to join the union, no CBA</li> </ul>	<ul style="list-style-type: none"> <li>Ensure safety net, wage rate in CBA</li> <li>In many cases, employers must consult with the union to use PW(ex. Skills, safety, union inductions, etc.)</li> <li>In some agreement, conversion of contract workers to direct employment after set period of time</li> </ul>
Finland	10-30%	<ul style="list-style-type: none"> <li>In STX shipyard (Turku) less than 50% are directly employed. by STX. The rest are from subcontractors and 55 % of them are foreign posted workers (mostly from Poland, Estonia and Romania). It is estimated that 30 % of the manual workers are precarious. situation in the smaller shipyards is better.</li> <li>In marine equipment companies only less than 10 % of the workforce is precarious.</li> </ul>	<ul style="list-style-type: none"> <li>hired one Polish speaking union officer</li> <li>lobbying for compulsory Tax Identification Number for all workers to decrease unreported employment and increase protection for workers.</li> <li>work actively with the Labor Inspectors to conduct effective jurisdiction for them.</li> <li>In some CBAs improvements has been achieved in last few years.</li> </ul>
Germany	Labor leasing 11%, Sub-con 28%, Lmt time con 2.6%	Agency-workers slowly decreased compared to 2012, but sub-contractors increased. Agency-work is being replaced by contracts for sub-contractors – which is less regulated.	<ul style="list-style-type: none"> <li>For temporary employment/agency work a collective agreement (wage settlement, framework of regular employment) has been introduced in 2012 which guarantees agency-workers wages up to 80% of the wages or directly employed</li> <li>In the case of sub-contractors, the union achieved CBAs(ex. Meyer Werft GmbH, Fr. Lürssen Werft)</li> </ul>

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# Precarious Work 2

Country	% of PW	Issues	Response/CBA
Japan	-	PWs at shipbuilding yards is not much existing. So called Cooperation Worker(regular workers who works for group or contract company) have increased since 2000 and they consist 40% at the yards.	
Norway	30-40%	<ul style="list-style-type: none"> <li>The shipyards belongs to the Mechanical Engineering Agreement and that contains a lot of branches. But total number of members on the agreement have showed a decline and some of these are shipyard members.</li> <li>For several years the employers have had difficulties to recruit Norwegian blue collar workers to the shipyards, and foreign workers have been recruited on a precarious basis instead and they are much more difficult to unionize.</li> </ul>	<ul style="list-style-type: none"> <li>The biggest challenges in the shipbuilding industry are social dumping. The union has succeeded tackling the issues. Union's goal is to recruit a bigger part of the foreign workers to the union and to get collective agreements with their Companies. Replacement of Norwegian to foreign may cause losing competence.</li> <li>More of the ships are now produced in low cost countries.</li> </ul>
Singapore	60% (migrant)	<p>PWs are decreasing because of improving productivity and reducing their reliance on labour.</p> <p>Issues are;</p> <ol style="list-style-type: none"> <li>1. Working condition (safety)</li> <li>2. Accommodation condition</li> <li>3. Basic salary</li> </ol>	<ul style="list-style-type: none"> <li>Union leaders are members of the companies' workplace safety and health committee and provide relevant feedback to improve OHS.</li> <li>Union constantly visit dormitories of migrant workers to find out how to improve their living conditions. Based on the feedback the union and management will work together to implement the necessary improvement.</li> <li>Union negotiated more salary increment for low wage union members.</li> </ul>

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## Precarious Work 3

Country	% of PW	Issues	Response/CBA
Spain	30%	Job protection and OHS for PWs	Collective bargaining has been critical to prevent working conditions which are degraded more and also rights of demonstrations and strikes
Taiwan	3.5%	<ul style="list-style-type: none"> <li>PWs are used depends on supply and demand of shipbuilding industry. Currently, shipbuilding companies hold healthy orderbooks and maintain the sufficient works till 2015. We can say the precarious work in shipbuilding sector is stable now.</li> <li>PWs do not have the bargain power to deal with the employers on salary, working hours and working conditions. But basic working conditions have to be complied with government's law, i.e., precarious workers are also protected by government.</li> </ul>	Unions disagree to establish a limitation about precarious work in company (tentative up to 40%), one voice is 'no precarious work is allowed', another is '40% is too high'. No conclusion is made.



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## Precarious Work 4 (SA)

Country	% of PW	Issues	Response/CBA
Bangladesh	Build- 95% Break- 98%	Employers prioritize to employ temporary and casuals workers. Their wages are low, no protection of job, no identity card, no attendance card are given by employers. No compensation for accidents, no health care centre in a ship breaking yard.	Demanding for permanent jobs and all benefits guaranteed by Labour Laws including appointment letter, health care facilities, Decent job etc.
India	Break- 98%	Shipbreaking work is carried by casual and workers in India.	Unions are liaison with government authorities and employers and their contractors to improve service conditions, supply PPE's, housing colonies for workers, implementation of social security benefits e.g. ESIS, P.F., Pension, compensation, etc. Government authorities are responding but implementation at local level/ plant level is little bit slow.
Pakistan	Build-60% Break- 95%	PWs in shipbreaking is increasing. No social benefit and exposed by hazardous materials.	Formed shipbreaking union a year ago and demand contract system, social security scheme and OHS, but the shipowners did not recognize the union until now.



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# Organizing/Union Building 1

Union	Situation/Issues/Strategy
AMWU	<ul style="list-style-type: none"> <li>Blue collar: targeting directly employed workers to be 100% unionized.</li> <li>Non-manual: utilizing campaign to address their concerns over job security</li> <li>Issues: culture and relevance of the union in the white collar area, see themselves as contingent. Labor hire workers do join union once directly employed</li> </ul>
Finland(4unions)	<ul style="list-style-type: none"> <li>All-the-sector campaign going on in all unions.</li> <li>The Finnish IGU affiliated unions have a permanent co-operation under the name "Shipyard Working Group" which makes common initiatives yearly basis and prepare common policies.</li> </ul>
IG Metall	Work councils at the shipyards intensify the communication with agency-workers and employees of sub-contractors – especially on working conditions. Work councils also offer support to check the adequate wages.
Fellesforbundets	To recruit more members is main task for 2014.
SMEEU	<ul style="list-style-type: none"> <li>Inaccessibility of shipyard</li> <li>Companies are not willing to accord direct union recognition</li> <li>No namelist of bargainables</li> <li>Shipyards are located at one end of Singapore which is not very accessible.</li> </ul>
MCA-UGT	Union has made and awareness campaigns to explain the motives and reasons to unionize. Together we can better defend our rights and claims.
ROCMU	Some efforts have been made to establish trade unions for workers in the medium-size shipyards for more than one year. That will help workers to be included in the health and labor insurance. So far, no consensus is reached regarding the union type, functions of union and the leadership.

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# Organizing/Union Building 2 (SA)

Union	Situation/Issues/Strategy
BML	<ul style="list-style-type: none"> <li>Trying to organize in both ship building and ship breaking. Because of strong opposition by employers and negative attitude of labour department we are not getting registration. At present we are organizing in one ship building company, also trying to form union in one ship breaking industry.</li> <li>Employers engage miscreants, bribe the Labour Department. So that we face difficulty to form union.</li> </ul>
SMEFI	<ul style="list-style-type: none"> <li>Due to continuous efforts of union activities we could succeed in provision of potable drinking water at residential palaces, training to workers free of cost, sanitation facilities, drainage system, street lights, payment of compensation, family pension. Also union have taken the issues of labour colony, education of children, unique identity card (AADHAR), etc.</li> <li>Unions are organising gate meetings, awareness camps, medical camps, cultural programmes, through which union is spreading her wings. The membership of unions is increasing but obstacle is fluctuation in business resulting in less no of employment to the workers.</li> </ul>
NTUF	<ul style="list-style-type: none"> <li>The union in shipbuilding had CBA but the military government put ban on union activities. The case is in court.</li> <li>In shipbreaking, the union is in process to organize workers and conduct regular study circle on awareness of labour laws.</li> </ul>

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# Challenges 1

Union	Challenges	Activities at national/international
AMWU	<ul style="list-style-type: none"> <li>In 2015, if the Naval shipbuilding program is not conducted all yards will have lay workers off and it affects skills, workers confidence, etc. especially in TNCs</li> <li>Union capacity building and organizing un-organized</li> <li>Building effective National Industry delegates committee/network on political capacity and improving bargaining strategy</li> </ul>	<ul style="list-style-type: none"> <li>Pursuing minimum core standards on union rights, campaign and implement consistent standards through CB, full implementation of agreement standards</li> <li>Building strong and effective industry and TNC networks</li> </ul>
Finland (4 unions)	<ul style="list-style-type: none"> <li>Major shipbuilding projects has been suffering for lack of financing.</li> <li>Some countries makes difficulties for open competition. Such as policy for state aid than Finland which distorts competitiveness.</li> </ul>	<ul style="list-style-type: none"> <li>Lobbying for free market and fair regulation in shipbuilding and for state aids to be regulated so, that those are not guide to over capacity.</li> <li>Lobbying that the EU's Enforcement Directive for posted workers should make easier to protect workers' rights and ensure that working conditions for posted workers as local workers through CBA.</li> </ul>
France	Job protection under the low workload current and future due to global competition and defense status questioned especially in STX France which is possibly sold by Korean shareholder (66% stake).	Some companies launching Green Ship project
IG Metall	decreasing number of newbuilding contracts shipyards jump into new markets (f.e. Offshore-Construction – Vessels; components for Offshore-Wind energy) commercial banks do not want to finance newbuilding contracts	Domestic level: <ul style="list-style-type: none"> <li>better co-operation between shipyards concerning R&amp;D</li> <li>Introducing a reliable system of guarantee schemes (public) for the financing required for newbuildings</li> <li>Promoting advanced technologies for greener shipping</li> </ul> Regional level: <ul style="list-style-type: none"> <li>To inject some life into LEADERSHIP 2020 on European level</li> </ul> International level: <ul style="list-style-type: none"> <li>Reduction of overcapacities (socially acceptable)</li> <li>Prohibition of illegal subsidies (f.e China; South Korea)</li> <li>Introducing stricter regulations for shipping emissions on a global level (IMO)</li> </ul>

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# Challenges 2

Union	Challenges	Activities at national/international
JBU	<ul style="list-style-type: none"> <li>OHS promotion and secure jobs</li> <li>Improving the working conditions</li> </ul>	<ul style="list-style-type: none"> <li>Lobbying with employers association(SAJ) to the government and related ministry</li> </ul>
Fellesforb undets	<ul style="list-style-type: none"> <li>Since as much as 80% of the ships produced is offshore vessels like PSV, AHTS etc. for the oil and gas industry. Our main challenges are low-cost competition from Asian yards and the rise of precarious workers in the industry in Norway.</li> <li>The biggest challenge is social dumping. Union have used a lot of both human and economic resources to avoid and reduce this problem. Our goal is to recruit a bigger part of the foreign workers to the union and to get CBAs with their Companies.</li> <li>We are also afraid of losing competence because many of the Norwegian workers are replaced with foreign workers and the employers do not priority education of own employments.</li> </ul>	
SMEEU	<ul style="list-style-type: none"> <li>Aging workforce especially Singaporean workers</li> <li>Singaporeans are not keen to join the marine industry</li> <li>Recruitment and retention of union members</li> </ul>	<ul style="list-style-type: none"> <li>SMEEU works closely with the Singapore National Trades Union Congress to attract more Singaporeans into the marine industry.</li> <li>The union steps up its effort in organising more companies. With more unionized companies there will be a bigger pool of potential members.</li> <li>Provide incentive such as loyalty trip for long serving union members to improve retention.</li> </ul>
MCA-UGT	<ul style="list-style-type: none"> <li>Maintaining workers Rights</li> <li>Incorporation of Youth and Women and Integration of Migrants in the Sector</li> <li>Better Training and Qualification</li> <li>Measures to respect and Protect the Environment</li> </ul>	<ul style="list-style-type: none"> <li>Need to identify how to generate the sector and employment.</li> <li>Raise awareness among national governments and the European Community must protect and promote the Sector</li> <li>Support Training programs,.</li> <li>European Union finance on different projects</li> <li>Enact clear and equal laws with which compete all Countries</li> <li>Protecting the Domestic Market and the European Union</li> <li>Combating Unfair Competition of Asian Countries</li> <li>Incorporate the Female Youth and Sector</li> </ul>
ROCMU	The challenge is to gain union members in our union. Big enterprise like CSBC follows government's rules and regulations, workers' union is easily to be established. But small and medium size enterprises don't, or the functions of union are not executed normally.	<ul style="list-style-type: none"> <li>Talk to workers and help them to establish unions in company or sectorial level.</li> <li>Talk to employers and make them understand the functions of workers' union. It is not easy to do in some private companies, but it could be tried.</li> </ul>

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## Challenges 3 (SA)

Union	Challenges	Activities at national/international
BML	<ul style="list-style-type: none"> <li>Lowest unionization rate</li> <li>Employers engage miscreants and looms to threaten workers to refrain from unionization</li> <li>Negative attitude of Labour Department to give registration</li> <li>Employers have money power</li> <li>Dismissal from job for any attempt to unionize</li> <li>Non-implementation of Labour Law in these two sectors</li> </ul>	<ul style="list-style-type: none"> <li>Training and workshops to create awareness</li> <li>Providing all kinds of assistance including financial assistance be given to workers at enterprise level to organize unions</li> <li>Help financially who lose jobs for forming union</li> <li>Federations and National Centers take strong position to form union</li> <li>International Organizations can support financially for workshops, those who lose jobs and start giving drinking water, primary health care with medicing to workers at the enterprise level etc.</li> </ul>
SMEFI	<ul style="list-style-type: none"> <li>Representation of Shipbreaking workers at various government agencies.</li> <li>Competition from Bangladesh and Pakistan.</li> <li>Global financial crisis and fall of Indian Rupees.</li> </ul>	<ul style="list-style-type: none"> <li>At domestic level to pressurize government as well as employers for representation at GMB, Minimum Wage Board, and other boards.</li> <li>Organising more and workers.</li> <li>Level playing field at regional level.</li> <li>Solidarity support at international level.</li> </ul>
NTUF	<ul style="list-style-type: none"> <li>Union busting by employers and government</li> <li>Fear among workers to join the union</li> <li>Non availability of legal assistance, lawyer fee is very high and can not afford for it.</li> </ul>	<ul style="list-style-type: none"> <li>Need for strong international solidarity at/in time of need an emergency basis</li> <li>Well equiped legal aid system to help workers</li> <li>Awareness training programme</li> </ul>



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## Creating Trade Union Network 1

Union	Opinion/priority
AMWU	<p>Creating the naval shipbuilding sector network</p> <ol style="list-style-type: none"> <li>The coordination of TNCs such as BAE, Austral, Thales, Navantia</li> <li>Map out major global players as well as supply chain</li> <li>Exchange info to assist building worker solidarity</li> <li>Central online resource to share and deposit information</li> <li>A regular IndustriALL Maritime industry newsletter</li> </ol>
Finland	<ul style="list-style-type: none"> <li>Trade Union Networks on STX could be relevant as well as marine equipment companies like Wärtsilä, ABB and Rolls-Royce .</li> </ul>
IG Metall	<ul style="list-style-type: none"> <li>Different kind of networks with shopstewards and works councils on factory and branch level over the whole maritime sector.</li> <li>On top of the eternal networks of the IG Metall we have different networks with the industry (employees) and politics.</li> </ul>
MCA-UGT	Need to create network from the company level to European level in order to protect and promote employment and wealth.
ROCMU	Need to increase the case study – ex. solve the dispute or how to build the network during the international or regional meetings, that will be helpful to all the participants to learn experience from other unions.



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# Creating Trade Union Network 2 (SA)

Union	Opinion/priority
BML	All kinds of network are necessary for exchange of information on various fields- unionization, wage, freedom of association, labour law, working & living conditions of workers. We shall gather information for unionization and decent work in these two sectors. We can go further to seek co-operation of each other to strengthen unionization, work and common agenda for the betterment of workers in these two sectors.
SMEFI	<ul style="list-style-type: none"><li>• A series of meeting has been conducted by IndustriALL- South Asia Office between the shipbreaking Asian countries, India, Bangladesh, Pakistan and planning to form a Regional Platform. (Bro. Rane has been asked to shoulder the responsibilities of Regional coordination of shipbreaking)</li><li>• We should keep pressure on shipbuilding companies to collect 'levies' when the ship is due for breaking . This fund should be used for the welfare measures, training and betterment of workers working in shipbreaking and members of their families. Trade unions should be a part of such schemes / Trusts with the participation of government and employers.</li><li>• Liaisoning &amp; coordinating with research institutions/reputed universities (vz. Malmo University).</li></ul>
NTUF	<ul style="list-style-type: none"><li>• The network should be regional basis and then have global structure.</li><li>• The first priority of the union in shipbuilding is to get workers rights back as it was banned by military government.</li><li>• In shipbreaking, network for organize workers and get union recognition by employers.</li></ul>



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# Thank You

**Website**  
[www.industriALL-union.org](http://www.industriALL-union.org)