



# **IndustriALL Global Union** **Shipbuidling-Shipbreaking AG** **Introduction & Background**

12-13 November, 2013

Jørlunde, Denmark

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# 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 2012 in Rio

## the priority and activities

*Red: not progressed Black: as usual Blue: bit progressed Green: progressed*

- ❖ Continue to follow up on the Conclusions of the IMF-EMF Global Conference on Safe, Sustainable and Green Jobs in Shipbuilding-Shipbreaking in 2011
- ❖ **Seek collaborated activities with Mechanical Engineering, Chemical, Oil and Gas sectors**
- ❖ **Reach out to unorganized workers and promote OHS in both shipbuilding and shipbreaking**
- ❖ **Demand that governments ratify the IMO's Hong Kong International Convention for the Safe and Environmentally Sound Recycling of Ships as soon as possible**
- ❖ **Recommend that other industrial sectors start to discuss how to reach out to related recycling industries and workers**
- ❖ **Conduct Joint Survey/Research with IndustriALL European Trade Union to map out shipbuilding-shipbreaking unions and identity union activities and current issues including precarious and subcontracted work**
- ❖ **Expand participation of unions representing workers with major contribution to global shipbuilding production in future meetings**
- ❖ **Develop solidarity platform to fight against the growth of precarious work in the sector and to defend shipbuilding-shipbreaking workers rights**
- ❖ **Develop cooperation/collaboration with international organizations such as IndustriALL European Trade Union, ITF, OECD WP6, ILO, IMO, EU Commission and NGOs**
- ❖ **Seek possibility to negotiate GFAs/creating new network in shipbuilding MNCs**





# IndustriALL's Goals and Key Strategies until 2016

Between now and 2016 IndustriALL will:

## 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*





# SHIPBUILDING



# Trends in Shipbuilding Industry 1

## World New Orders

Country	2007		2012		2007 vs 2012
	'000GT	share	'000GT	share	
Japan	20,413	12.0%	8,851	23.3%	- 56.6%
S. Korea	67,893	40.0%	11,967	31.5%	- 82.4%
China	61,342	36.2%	13,761	36.2%	- 77.6%
Europe total	3,863	2.3%	1,141	3.0%	- 70.5%
Brazil	504	0.3%	582	1.5%	+ 15.3%
Singapore	88	0.1%	7	0.0%	- 92.0%
Taiwan	1,226	0.7%	63	0.2%	- 94.7%
USA	97	0.1%	212	0.6%	+ 118%
India	1,990	1.2%	145	0.4%	- 92.7%
Philippines	3,545	2.1%	405	1.1%	- 88.6%
Vietnam	1,465	0.9%	117	0.3%	- 92.0%
World total('000GT)	169,600		38,000		- 77.6%

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)





# Trends in Shipbuilding Industry 2

## Share of completion in 2012

Percentage by GT, CGT and value

	GT (000)	CGT (000)	Value (USD billion)
China	40.5	41.3	35.2
Japan	18.4	17.8	16.1
Korea	33.4	29.6	31.9
→ Europe	2.4	5.4	9.2
Others	5.3	6.1	7.6

Source: Clarkson (2013).

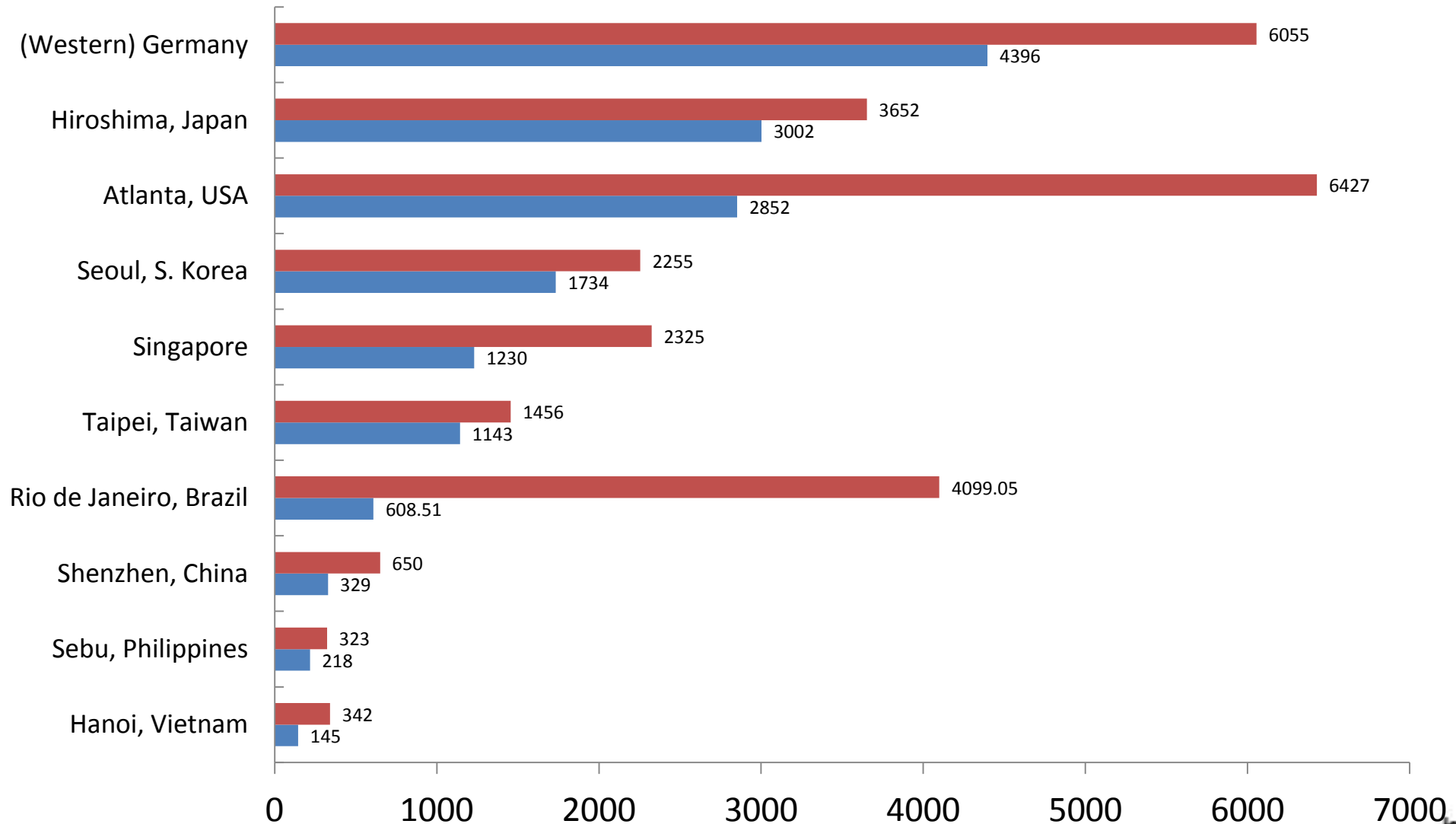
***“European economies are competitive in some niche vessel markets where their products are more complex and sophisticated and have higher value added.”***

Source: OECD WP6 “Workshop on Global Value Chains in Shipbuilding- Issue Paper”



## Ex. Standard Wages of Manufacturing Workers

(2012, in US dollar/month **RED:** Engineer **BLUE:** Production)



Data Source: JETRO







# SHIPBREAKING



South Asia region- India, Bangladesh, and Pakistan account **72%** of world shipbreaking in gross tonnage.

### Amount of Shipbreaking

In 1992  
6,657,000GT



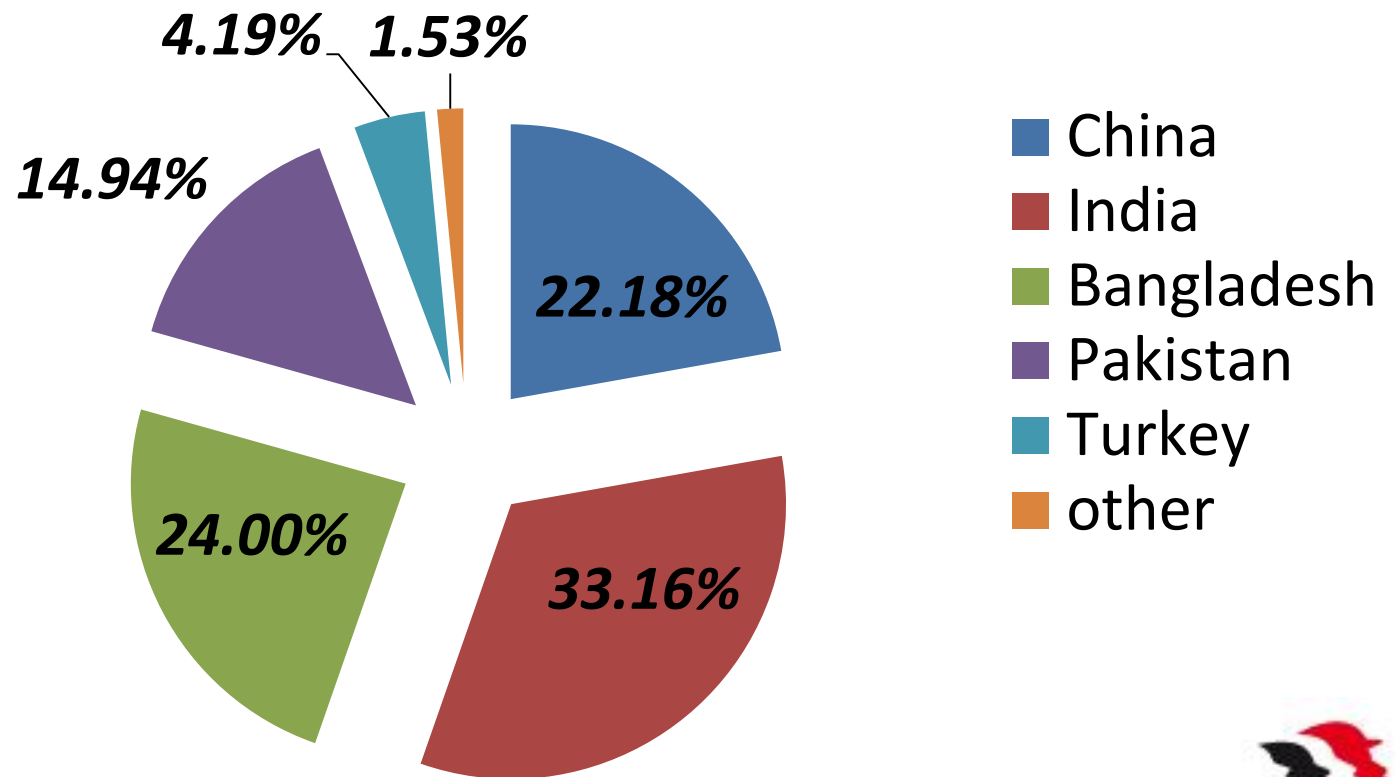
In 2002  
17,831,000GT



In 2012  
**36,816,000GT**

**× 5.5 in 20 years**

### Shares in % of Gross Tonnage by countries (2012)



Source: "Shipbuilding Statistics" September 2013, the Shipbuilders' Association of Japan



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

### PAKISTAN

20,000

NTUF – (8,000)

(LUG – ?)

### INDIA

66,000

SMEFI(MPTGEU  
+ASSRGWA)

13,000



### BANGLADESH

39,000

BMF – 513

BML – 220

(JSL – 1500)

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



# Organizing Shipbreaking Workers in South Asia

## Supporting IndustriALL affiliates



## 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





# **Outcome of Survey 2013**

## **(15 unions/12 countries)**



# 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





# 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 Risisng Steel Re-rolling mill				
M/S Janata Holding				
M/S Leasing Enterpirse				
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				



# 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	<b>18,000</b>	10%	35%	<b>13,500</b>	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





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

## 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	



# 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





# 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	<p>These are six major groups are existing in shipbreaking by forming various establishments/ firms in India.</p> <p>-More than 35000 shipbreaking workers working in shipbreaking industry in India.</p> <p>-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.</p> <p>-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.</p>			
BANSAL GROUP				
HARAYANA GROUP				
JAIN GROUP				
AGRAWAL GROUP				
PATEL GROUP				





# 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





# 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			





# 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)





# SINGAPORE - SMEEU

	No. of Employment	% of Women	% of Non-manual	Union membership	% of Women	% of Non-manual
Shipbuilding	<b>20,000</b>	10%	30%	<b>2,400</b>	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	-	-



# 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	







# 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	3,680	-	-	2,800	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





# Global situation on Shipbuilding-shipbreaking workers – Key Words

## EUROPE

*Social dumping, competition with outside,  
Union right- CBAs for posted/ foreign workers,  
shifting to offshore and green*

## Japan

*Shifting new  
technology,  
secure jobs*

## Taiwan

*Reach out workers in  
SMEs and supply  
chain*

## Singapore

*Migrant workers,  
Aging workforce*

## Bangladesh&Pakistan

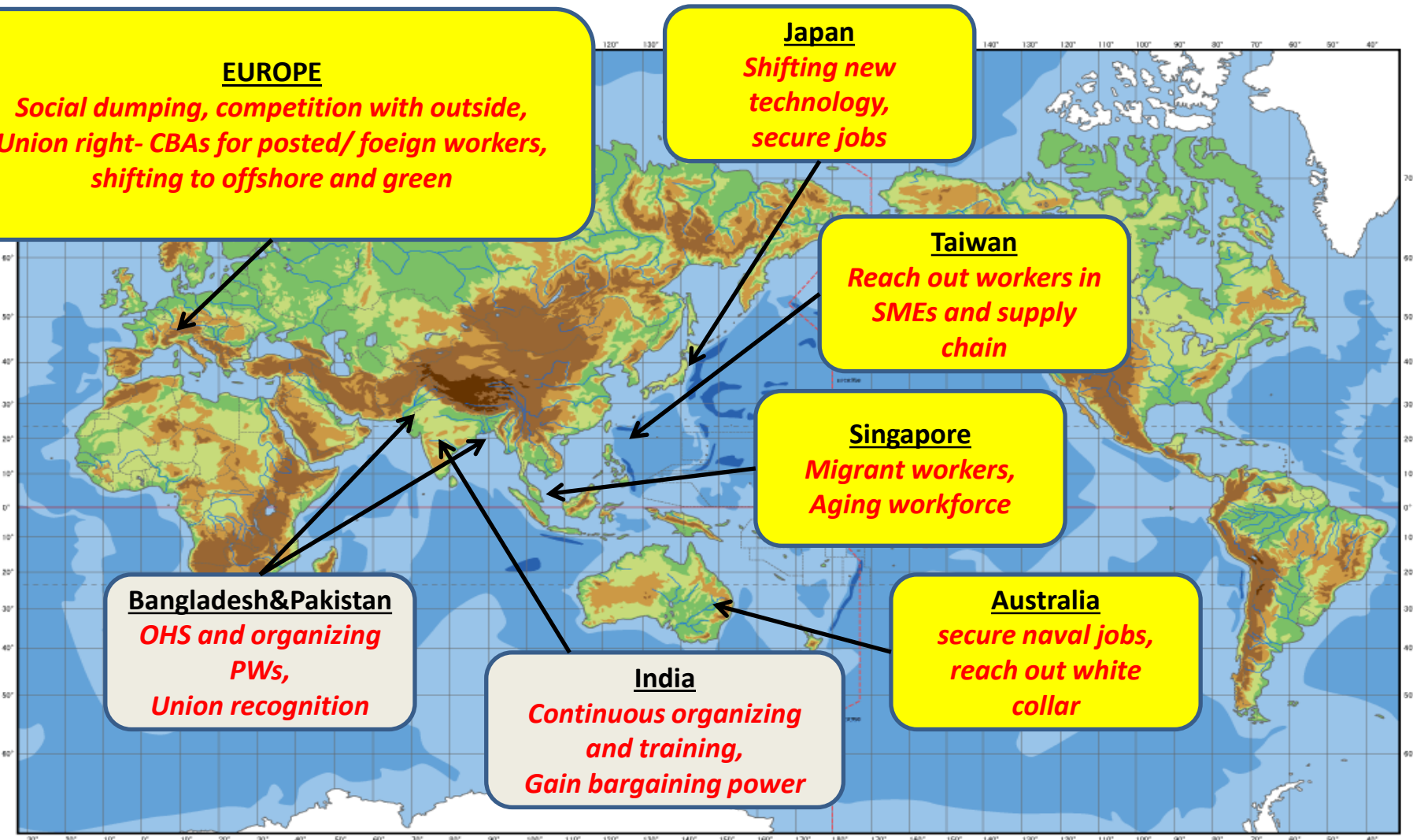
*OHS and organizing  
PWs,  
Union recognition*

## India

*Continuous organizing  
and training,  
Gain bargaining power*

## Australia

*secure naval jobs,  
reach out white  
collar*



# 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>

# 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>

# 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.

# 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.

# 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 contingnet. 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.



# 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 programmers, 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>



# 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	<p>decreasing number of newbuilding contracts</p> <p>shipyards jump into new markets (f.e. Offshore-Construction – Vessels; components for Offshore-Wind energy)</p> <p>commercial banks do not want to finance newbuilding contracts</p>	<p>Domestic level:</p> <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> <p>Regional level:</p> <ul style="list-style-type: none"> <li>To inject some life into LEADERSHIP 2020 on European level</li> </ul> <p>International level:</p> <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>

# 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	<p>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.</p>	<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>

# 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 equipped legal aid system to help workers</li> <li>• Awareness training programme</li> </ul>

# Creating Trade Union Network 1

Union	Opinion/priority
AMWU	<p>Creating the naval shipbuilding sector network</p> <ol style="list-style-type: none"> <li>1. The coordination of TNCs such as BAE, Austral, Thales, Navantia</li> <li>2. Map out major global players as well as supply chain</li> <li>3. Exchange info to assist building worker solidarity</li> <li>4. Central online resource to share and deposit information</li> <li>5. 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	<p>Need to create network from the company level to European level in order to protect and promote employment and wealth.</p>
ROCMU	<p>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.</p>

# 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>



# Thank You



**Website**

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