



Secure jobs for secure future

the workers' rights become a key factor for creating fair competitive conditions

OECD WP6 Special Session on Market Distorting Factors

21 June, 2012

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Building Unity and Power



115 countries
355 unions
20 million workers



100 countries
200 unions
25 million workers



110 countries
217 unions
10 million workers



Founding Congress of IndustriALL Global Union
Representing workers across supply chains in mining, energy and manufacturing sectors at the global level.

140 countries
50 million workers





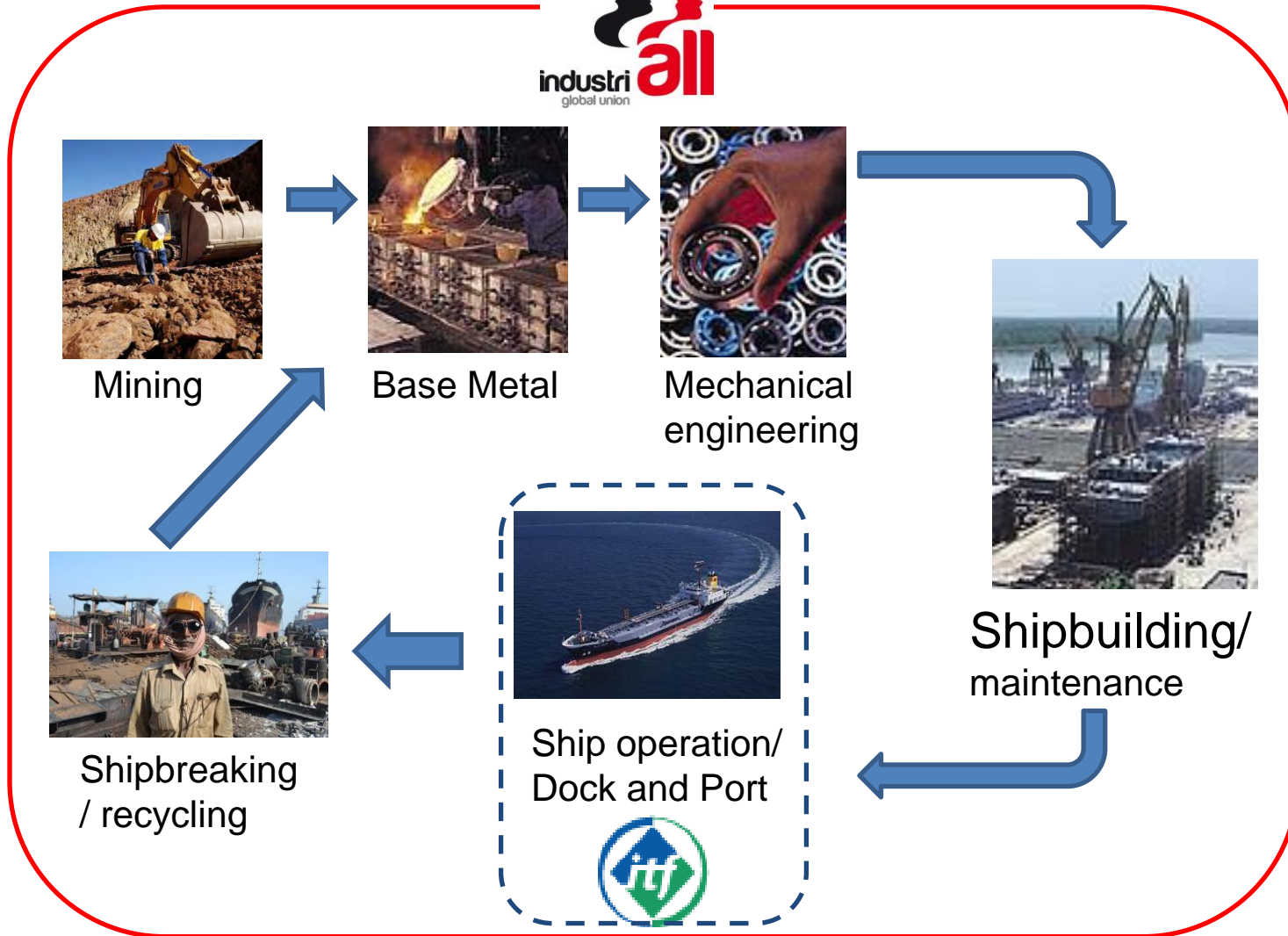
List of industrial sectors within IndustriALL's jurisdiction

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





Representing manufacturing workers in the life cycle of ship





Market Distorting Factors

the workers' rights become a key factor

Pricing/Cost



Protection of the national market

Subsidy/Aid

Anti-competitive practices

Since shipbuilding industry is highly labour intensive industry, the labour cost consists big portion of total production cost.








Are wages and labour conditions fairly negotiated between workers' unions and employers?





Ratification of ILO fundamental Conventions by countries

Country	Freedom of association		Forced labour		Discrimination		Child labour	
	C087	C098	C029	C105	C100	C111	C138	C182
-								
EU	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue
Turkey	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue
 Brazil	Red	Blue	Blue	Blue	Blue	Blue	Blue	Blue
 China	Red	Red	Red	Red	Blue	Blue	Blue	Blue
 India	Red	Red	Blue	Blue	Blue	Blue	Red	Red
Indonesia	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue
Japan	Blue	Blue	Blue	Red	Blue	Red	Blue	Blue
 Korea, Republic of	Red	Red	Red	Red	Blue	Blue	Blue	Blue
Malaysia	Red	Blue	Blue	Red	Blue	Red	Blue	Blue
Pakistan	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue
Philippines	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue
Singapore	Red	Blue	Blue	Red	Blue	Red	Blue	Blue
 Viet Nam	Red	Red	Blue	Red	Blue	Blue	Blue	Blue

source: ILO NORMLEX





Workplaces are moving

World Orderbook at Year-End (in share)

	2005		2011
Japan	31.6%		15.8%
S. Korea	36.1%		35.0%
China	15.8%		38.7%
Europe total	6.5%		1.7%
USA	0.4%		0.3%
Brazil	0.1%		1.2%
Taiwan	1.4%		1.0%
India	0.3%		0.9%
Philippines	0.5%		2.2%
Vietnam	0.5%		1.0%
World total('000GT)	164,022		216,967

Amount and share are increasing in the countries where ILO 87 and 98 are not respected.

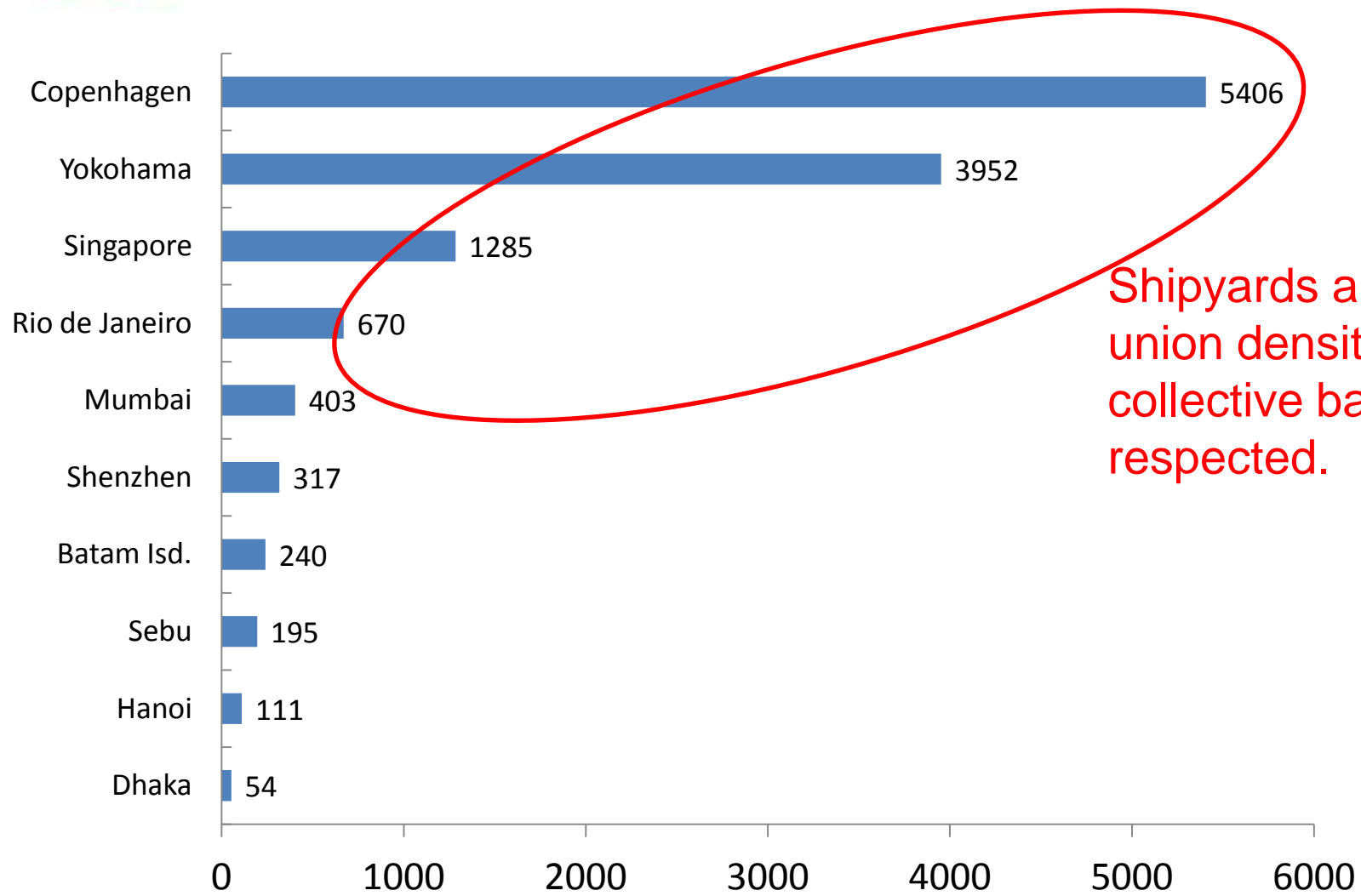
Workplaces have been moving from organized to unorganized.



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



Ex. Standard Wages of Manufacturing Workers (2009-2010, in US dollar/month)



Shipyards are/were high union density, rights of collective bargaining are respected.

Source: JETRO





IMF Survey - Employment in Shipbuilding

Country	2010(or latest)	2005	2000
JAPAN	98,320	80,211	100,145
W% N%	W=1.5% N=55%	W=1.7% N=45%	W=2.1% N=40%
GERMANY	16,760	18,980	21,121
W% N%	W=10% N=7-40%	W=10% N=7-40%	W=10% N=7-40%
FRANCE	4,000	4,500	6,500
W% N%	W=15% N=55%	W=13% N=55%	W=8% N=45%
NORWAY	38,400	31,800	32,400
W% N%	W=15% N=55.6%	W=10.7% N=42.6%	W=n.a. N=52.6%
FINLAND	9,000	9,000	12,000
W% N%	n.a.	n.a.	n.a.
DENMARK	5,635	6,263	7,242
W% N%	W=5%(max.) N=30%	W=5%(max.)	W=5%(max.)
BRAZIL	56,112	n.a.	4,000
W% N%	n.a.	n.a.	n.a.

Note: W=women, N=non-manual workers





IMF Survey – Union members in Shipbuilding

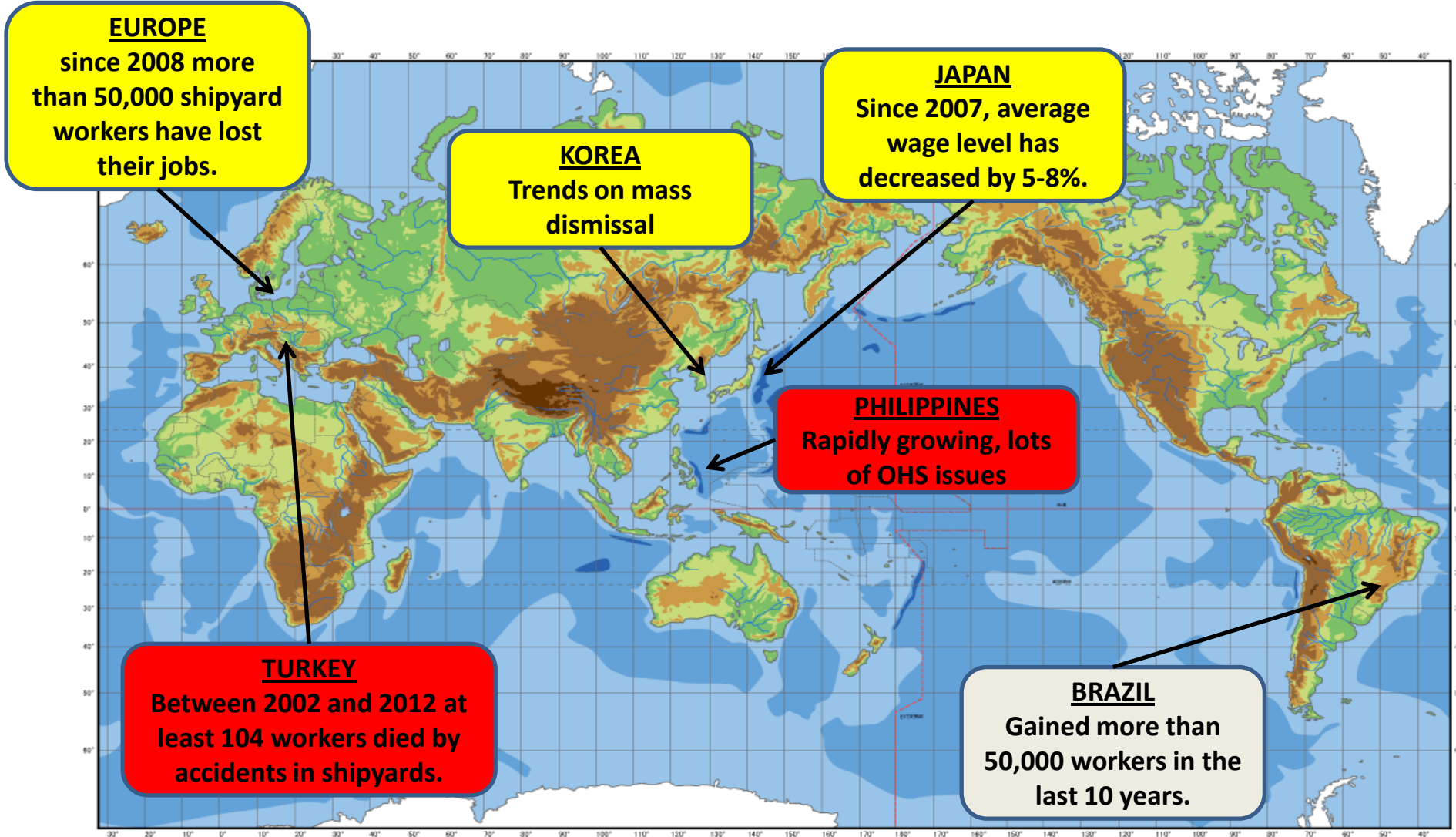
Affiliates	2010(or latest)	2005	2000
JBU(JAPAN)	88,000	70,000	93,000
W% N%	W=1.5% N=55%	W=1.7% N=45%	W=2.1% N=40%
IG Metall(GERMANY)	60-70%	60-70%	60-70%
W% N%	60-70%	60-70%	60-70%
CFDT(FRANCE)	2,200	3,000	5,000
W% N%	W=15% N=60%	W=15% N=60%	W=8% N=50%
Fellesforbundet (NORWAY)	No register members, only on agreement		
All shipbuilding unions (FINLAND)	7,200	7,200	9,600
W% N%	W=5% N=33%	W=5% N=n.a.	W=5% N=n.a.
DENMARK	4,500	5,500	6,500
W% N%	W=5%(max.) N=40%	W=5%(max.)	W=5%(max.)
CNM-CUT(BRAZIL)	37,000	n.a.	n.a.
W% N%	n.a.	n.a.	n.a.

Note: W=women, N=non-manual workers





Trends on employment in global shipbuilding industry





IMF-EMF Global Conference on Safe, Sustainable and Green Jobs in Shipbuilding/Shipbreaking

Conclusion(highlights) on 13-14th September 2011

IMF and EMF 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.

IMF and EMF underline that the transition to safe, sustainable shipbuilding-shipbreaking requires **investment not only in technologies but foremost in people and skills.**

Finally.....

The joint conference of IMF and EMF demonstrated that shipbuilding-shipbreaking remains a precarious and hazardous occupation in many regions. IMF and EMF therefore call on regulators and industry to **take immediate action to ensure the basic right to life as well as decent working conditions. Compliance with ILO core labour standards, conventions and agreements is essential and non-negotiable.** Trade unions are indispensable in this process as unionized workplaces are safer workplaces!





EMF sector committee on shipbuilding

Rosyth Declaration (highlights) on 19-20th October
2011

In the light of the breakdown of the OECD negotiations and the lack of international regulations for shipbuilding, the burden lies all the more on the European Commission and its Member State's governments to ensure in bi- or multilateral negotiations that **European shipbuilders are shielded from unfair competition.**

We call upon the EU Commission to deploy all the resources at its disposal in a bid to impose **fair global competitive conditions.** The EMF urges the Council of Ministers and the Commission to launch an investigation into available commercial measures and responses to dumping strategies implemented by Southeast Asian countries. This position **should be reflected in any free trade agreement between the EU and the Asian countries in question.**

It is **no mystery that the competitive advantage of Far-East shipbuilding stems to a great extent from state aid, disregard for protection of environment and violation of human and workers' rights and social dumping, among others.** It is high time the European Commission takes steps in order to balance this unfavourable situation. **Under no circumstances may the rights of trade unions become a factor of competitiveness.**





Thank You



Website

www.industriALL-union.org