



FIRST ITEM ON THE AGENDA

**Report on sectoral activities in 2002-03
and progress in the implementation of
the programme for 2004-05**

1. This paper consists of three parts. Part I is an overview of sectoral activities carried out in 2002-03. In addition to the activities mentioned, most sectoral specialists participate regularly in the activities of other international governmental and non-governmental organizations, including those of the social partners. The publications listed in Part I do not include reports prepared for sectoral meetings and the International Labour Conference, speeches and papers presented at conferences, articles and interviews.
2. Part II is a broad outline of sectoral activities planned for 2004-05.
3. Part III is an overview of all 22 sectors under five headings: main issues; specific data; ILO instruments; social dialogue; and recent meetings (held in the last two biennia). More comprehensive information is to be found on the sectoral web site.
4. In addition to responding to requests for follow-up activities in the different sectors, and in accordance with the proposals adopted by the Governing Body at its 286th Session (March 2003), the programme started the new approach of a mix of meetings, action programmes and follow-up activities to meetings, as follows:
 - (a) four meetings in 2004-05:
 - (i) two tripartite sectoral meetings (media, culture, graphical sector, 18-22 October 2004); transport equipment manufacturing sector (early 2005); and
 - (ii) two meetings of experts early in 2005 (basic metals; forestry);¹
 - (b) seven action programmes will be implemented in the following sectors: agriculture; construction; education; financial services; hotels and tourism; textiles and clothing; and HIV/AIDS in the workplace. Consultations, planning or implementation meetings for the first six above were held in November 2003 and February 2004. A meeting for the seventh will be held in April 2004;

¹ GB.288/13, para. 19; GB. 287/7.

- (c) follow-up activities based on the outcome of recent sectoral meetings and associated research.
5. In the past, requests for follow-up generally fell into one or more of the following categories:
- (a) the promotion of sector-specific international labour standards and codes of practice;
 - (b) the organization of sector-specific national, regional and interregional meetings, workshops or seminars;
 - (c) the provision of technical advisory services and technical cooperation in specific areas;
 - (d) research, publication and dissemination of the results; and
 - (e) the collection and dissemination of sector-specific information and data.
6. Although these clusters and criteria still apply, more emphasis is now placed on responding to the express needs of constituents in accordance with the decision of the Governing Body as a result of the programme review process.² The Joint Programming Workshop (November 2003) identified areas for sectoral cooperation with the field offices. Similarly, Office-wide consultations are proving useful in integrating sectoral activities into the mainstream of ILO activities and in developing partnerships, thereby leading towards a more coordinated and productive organization and implementation of activities.
7. With a view to facilitating worldwide access to ILO sector-specific information, the Sectoral Activities Department has continued to update its web site. It includes reports prepared for sectoral meetings, the outcome of the meetings, working papers and information on sectoral trends, plus links to a wide range of related ILO and other information. This information will be integrated into the new-look ILO web site later in 2004.
8. As follow-up to the paper on employment and social policy in respect of export processing zones (EPZs),³ the programme developed a database on EPZs. This web-based database, which became operational in December 2003, contains links on a country-by-country basis to all sectors.
9. The Committee is invited to take note of the information in the three parts of this paper.

Geneva, 9 February 2004.

² GB.286/STM/1, para. 7.

³ GB.286/ESP/3.

Part I. Activities in 2002-03

Meetings	Studies/research/working papers	Other activities
<i>Agriculture, plantations, other rural sectors</i>		
Social dialogue and the Poverty Reduction Strategy Paper (PRSP). Workshops for the Tanzania Plantation and Agricultural Workers' Union (TPAWU); the Association of Tanzania Employers; and a tripartite workshop, United Republic of Tanzania (November 2002, February and September 2003)	Kenya: <i>Facing the challenge of Africa's integration in the global economy: The role of multinational enterprises in the plantations sector</i> , 2002 Uganda: <i>Multinational enterprises in the plantation sector: Labour relations, employment, working conditions and welfare facilities</i> , 2003	Capacity building programme for government, agricultural employers, trade unions and rural workers' organizations on occupational safety and health (OSH) in agriculture, Costa Rica Tanzania Plantation and Agricultural Workers' Union (TPAWU)/ILO zonal workshops to familiarize grassroots members with the Tanzanian PRSP Advisory services for common codes for the coffee community
Promotion of the MNE Declaration and social dialogue in the plantation sector, Uganda (April 2003)		
Implementation of Convention No. 184, Moldova (January, December 2003)		
<i>Basic metal production</i>		
Promotion of code of practice on safety and health in the non-ferrous metals industries: Russia (June 2003) India (November 2003) China (December 2003)		Publication and dissemination of code of practice in pocket format
<i>Chemicals</i>		
Tripartite Meeting on Best Practices in Work Flexibility Schemes and their Impact on the Quality of Working Life in the Chemical Industries, Geneva (October 2003)	Research on good industrial relations practices and outcomes, particularly in relation to corporate restructuring and information on good safety and health practices and results	
<i>Commerce</i>		
<i>Active social dialogue in the Czech commerce sector, Czech Republic (May 2002)</i>		
<i>Construction</i>		
Workshops for UN Volunteers (UNV) project on informal construction workers in Tanzania (2003)	<i>Informal labour in the construction industry in Nepal</i> (2002) <i>The construction labour force in South Africa: A study of informal labour in the Western Cape</i> (2003) <i>Informal labour in the construction industry in Kenya: A case study of Nairobi</i> (2003) <i>Organizing in the informal economy: A case study of the building industry in South Africa</i> (2003) <i>How to prevent accidents on small construction sites</i> (2003)	Films: <i>The causes of accidents and ill health on construction sites and how to prevent them (India and United Republic of Tanzania)</i> ; and <i>The role of women in the construction workforce in India</i> Training workshops in India with International Federation of Building and Wood Workers (IFBWW)

Meetings	Studies/research/working papers	Other activities
	Labour practices in large construction projects in Tanzania (forthcoming)	
	The Construction Labour Welfare Board in Kerala (forthcoming)	
<i>Education</i>		
Joint ILO/UNESCO Committee of Experts on the Application of the Recommendation concerning Teaching Personnel, 8th Session, 2003	<i>Statistical profile of the teaching profession</i> , 2002	Technical advisory missions on social dialogue, education and the PRSP in the United Republic of Tanzania
Social dialogue in education within the ESDP/PRSP framework in the United Republic of Tanzania	<i>Teachers and new ICT in teaching and learning: Modes of introduction and implementation: Impact and implications for teachers</i> , 2002	Framework activities and MOU for the education for all flagship programme on teachers (Cambodia and United Republic of Tanzania)
Social dialogue in education and teachers' status: Cambodia and South-East Asia, 2003 (UNESCO)	<i>Teaching and the use of ICT in Hungary</i> , 2003	Promotional activities for World Teachers' Day
Information and communications technologies (ICT) and the roles of teachers (Education International with ILO support), 2002	<i>Workplace violence in service sectors with implications for the education sector: Issues, solutions and resources</i> , 2003	
	<i>Violence et stress au travail dans le secteur de l'éducation</i> (French-speaking countries)	
	Academic tenure and its functional equivalent in post-secondary education (forthcoming)	
	Social dialogue in education (forthcoming)	
	Country survey on social dialogue in education: Cambodia (forthcoming)	
<i>Financial services, professional services</i>		
Promoting social dialogue on mergers and acquisitions: Restructuring in financial services for selected Asian countries, Philippines (October 2002)		
Promoting social dialogue on financial services restructuring in Latin America (August 2003)		
<i>Food, drink, tobacco</i>		
Tripartite Meeting on the Future of Employment in the Tobacco Sector, Geneva (February 2003)	<i>The tobacco sector in the United States: A study of five states</i> , 2002	
	<i>The world tobacco industry: Trends and prospects</i> , 2002	
	<i>Tobacco: An economic lifeline? The case of tobacco farming in the Kasungu Agricultural Development Division, Malawi</i> , 2003	
	<i>Making ends meet: Bidi workers in India today. A study of four states</i> , 2003	
	<i>A study of the tobacco sector in selected provinces of Cambodia and China</i> , 2003	
	<i>Employment trends in the tobacco sector: Selected provinces of Bulgaria and Turkey</i>	

Meetings	Studies/research/working papers	Other activities
	<p><i>Prospects for micro, small and medium enterprises in the food and drink industries in Guyana</i> (forthcoming)</p> <p><i>El sector de alimentos y bebidas: Productores formales e informales y sus condiciones en la generación de empleo. El caso de Costa Rica y Nicaragua</i> (forthcoming)</p> <p><i>Le secteur alimentation et boisson au Burkina Faso: Au-delà de la survie</i> (forthcoming)</p>	
Forestry and wood industries		
<p>Socially responsible industry restructuring</p> <p>Wooden furniture industry in Central Java, Indonesia (March 2003)</p> <p>Value chain workshop for policymakers, Indonesia (April 2003)</p>	<p><i>Outlook study on employment in the forest industry in Europe and CIS</i> (prepared for the European Forest Sector Outlook Study (EFSOS))</p> <p><i>Structural change in forest worker training in Europe</i> (prepared for the EU-funded ERGOWOOD project) (forthcoming)</p> <p><i>Raw material supply for the SME furniture industries in central Java, Indonesia</i></p> <p><i>Employment trends and prospects in the European forest sector</i> (published by ECE)</p> <p><i>How we work and live. Forest workers talk about themselves</i></p> <p>FORWORKNET Update No. 10. Focus on safety and health</p> <p><i>Raising awareness of forests and forestry, 2003</i></p>	<p>Implementation of the code of practice in China</p> <p>Developing a code of forest practice in the Philippines</p> <p>Developing a code of forest practice in Uruguay</p> <p>Training of foresters in Uruguay</p> <p>Developing safety and health regulations for forestry in Guyana</p> <p>Gender and forestry (coordinating team of specialists)</p> <p>Development of guidebook and accompanying multimedia kit for SMEs in the furniture industries in Indonesia (<i>How to get and use effectively good quality timber</i>)</p> <p>Draft guidelines for labour inspection in forestry</p>
Health services		
<p>Workplace violence: A threat to quality health services, ILO/ICN/WHO/PSI seminar, Geneva (September 2003)</p> <p>Workplace violence in the health sector, Bulgaria (October 2003)</p> <p>Strengthening social dialogue in the health services, Ghana (November 2003)</p>	<p><i>Social dialogue in the health services – Case studies of Brazil, Canada, Chile, and the United Kingdom, 2002</i></p> <p><i>Relationship between work stress and workplace violence in the health sector, 2003</i></p> <p><i>Workplace violence in the health sector: Country case studies: Synthesis report, 2002</i></p> <p><i>Workplace violence in the health sector: State of the art, 2002</i></p> <p><i>Framework guidelines for addressing workplace violence in the health sector, 2002</i></p> <p>Migration of health workers – Country case study, Philippines. Analysis of health worker migration for selected Asian countries, Canada, United Kingdom and United States</p> <p><i>The impact of Severe Acute Respiratory Syndrome (SARS) on health personnel, 2003</i></p>	<p>Development of a practical guidance tool on strengthening social dialogue in the health services</p> <p>Suggested approaches to promoting ratification of the Nursing Personnel Convention, 1977 (No. 149)</p>

Meetings	Studies/research/working papers	Other activities
	<i>International migration of health workers: Labour and social issues, 2003</i>	
Hotels, catering, tourism		
Regional Tripartite Meeting on Employment in the Tourism Industry for Asia and the Pacific, Bangkok (2003)	<i>Employment and human resources in the tourist industry in Asia and the Pacific, 2003</i> <i>Violence and stress at work in hotels, catering and tourism, 2003</i> <i>The impact of the 2001-02 crisis on the hotel and tourism industry, 2003</i> <i>New threats to employment in the travel and tourism industry, 2003</i> <i>Tourism employment in the Asia-Pacific Region, 2003</i>	A catalogue of criteria for reporting by tour operators on company practices for sustainable tourism (with UNEP) Seminars on social dialogue, Benin and Togo
Mechanical and electrical engineering (MEE)		
Tripartite Meeting on Lifelong Learning in the Mechanical and Electrical Engineering Industries, Geneva (September 2002)		Creation of one-stop EPZ portal
Media, culture, graphical industries		
	<i>Violence and stress at work in the performing arts and in journalism, 2003</i> <i>Child performers working in the entertainment industry around the world: An analysis of the problems faced, 2003</i>	
Mining		
	<i>Handbook on safety and health in small-scale surface mines</i> , published in Hindi, Portuguese and Urdu Chapters on small-scale mining and mine safety in two externally published books	Participation in World Bank Extractive Industries Review; Mining Metals and Sustainable Development Project Small-scale mining programme under NEPAD, with UNCTAD/ECA
Oil and gas		
Tripartite Meeting on the Promotion of Good Industrial Relations in Oil and Gas Production and Oil Refining, Geneva (February-March 2002)		

Meetings	Studies/research/working papers	Other activities
<i>Postal and other communications services</i>		
Tripartite Meeting on Employment, Employability and Equal Opportunities in Postal and Telecommunications Services Geneva (May 2002)	<i>El diálogo social en los servicios de correos en América Latina</i> , 2003 <i>Violence and stress at work in the postal sector</i> , 2003	
Social Dialogue in Postal Services in Latin America, Peru (August 2003)		
<i>Public services</i>		
Joint Meeting on Public Emergency Services: Social Dialogue in a Changing Environment (January 2003)	<i>Best practice in social dialogue in public service reform: A case of the Norwegian Agency for Development Cooperation (NORAD)</i> , 2003	
Validation workshops for a practical guide on strengthening social dialogue in public service reforms, Ghana (October 2003) and India (November 2003)	<i>Best practice in social dialogue in public service emergency services in South Africa</i> , 2003 <i>Case studies in social dialogue in the public emergency services, Argentina</i> , 2003	
	Gaps between the guidelines on social dialogue adopted by the public emergency services meeting (January 2003) and the reality in national laws and practice (Bulgaria, Kenya and Mexico)	
<i>Shipping, ports, fisheries, inland waterways</i>		
<i>Shipping</i>		
Meeting on International Registries (April 2002)	<i>Women seafarers: Global employment policies and practices</i> , 2003	Promotion of maritime labour standards, including Convention No. 185
Joint Maritime Commission, Subcommittee on Wages (July 2003)	<i>Global seafarers</i> (forthcoming)	Training of ship inspectors (Bulgaria, Egypt, Italy, Latvia, Malta, Ukraine)
High-level tripartite working group and subgroup sessions on maritime labour standards (June, October 2002 and February, June 2003)		
Regional symposia: Asia and the Pacific, Singapore (July 2002) and Latin America, Rio de Janeiro (April 2003)		
Preparatory meetings on seafarers' identity documents (May 2002, February 2003)		
ILC 2003: Adoption of the Seafarers' Identity Documents Convention (Revised), 2003 (No. 185)		
Informal meetings on biometrics (September, December 2003)		

Meetings	Studies/research/working papers	Other activities
<i>Ports</i>		
Joint ILO/IMO Working Group on Port Security (July 2003)	IMO/ILO/UN ECE Guidelines for Packing of Cargo Transport Units (CTUs), 2002	Promotion of the Portworker Development Programme (PDP): 11 new licenses issued for use of PDP training material
Meeting of Experts on Security, Safety and Health in Ports (December 2003). Adopted a draft code of practice on security in ports, a draft code of practice on safety and health in ports, and a resolution concerning the codes of practice on security and on safety and health in ports	Draft <i>port health and safety audit manual</i> (to be tested)	Technical assistance: Port component of the ILO/ITC project "Improvement of safety and health and working conditions in the maritime industry" (Russian Federation); and regarding draft regulations on occupational safety and health in dock work, Seychelles, 2003
	Translation of the Portworker Development Programme (PDP) from English into Arabic, Greek and Portuguese in addition to Bahasa Indonesian, Chinese, Korean and Spanish	ILO tripartite participation in the IMO Diplomatic Conference (December 2002)
	PDP implementation and instructors' workshops in Brazil, China, Egypt, Eritrea, Greece, Mexico, Philippines, Slovenia and Sudan	
	Revision of PDP Unit P.3.1 on handling dangerous cargoes in ports	
<i>Fisheries</i>		
Meeting of Experts on Labour Standards for the Fishing Sector (September 2003)	Study on cold water survival for fishers	Project on conditions of work in the fishing sector, Brazil
Joint FAO/ILO/IMO meetings to develop codes on safety and health	Studies on safety and health in fishing in southern Africa, Zambia	Training course for fishing sector employers in Latin American countries
<i>Textiles, clothing, leather and footwear industries</i>		
Competitiveness and Promotion of Decent Work in Textiles and Clothing, Morocco (December 2003). Plan of action for 2004-05 adopted	<i>Mise à niveau et compétitivité du textile-habillement: L'importance d'une approche durable fondée sur le travail décent et l'efficacité économique (Morocco)</i>	Collaboration on Decent Work Pilot Programme in Morocco
	<i>Tableau de bord économique et social de l'industrie du textile-habillement au Maroc</i>	Cooperation on project formulation on "Worker-management education project for supply chain factories on productivity and working conditions in Turkey"
		Contribution to a World Bank study on "Strengthening implementation of corporate social responsibility in global supply chains" (2003)
<i>Transport</i>		
<i>Civil aviation</i>		
Tripartite Meeting on Civil Aviation: Social and Safety Consequences of the Crisis subsequent to 11 September 2001, Geneva (January 2002)	<i>Consequences of the crisis subsequent to 11 September 2001 (2002)</i>	
Civil aviation in Latin and Central America: The social and employment consequences of restructuring after 11 September 2001, Costa Rica (May 2003)	<i>The impact of 11 September on the aviation industry: Traffic, capacity, employment and restructuring (2002)</i>	
	<i>The impact of the restructuring of civil aviation on employment and social practices (2002)</i>	
	<i>The crisis in civil aviation subsequent to 11/09/2001: 15 months later (2003)</i>	
	<i>Civil Aviation: The worst crisis ever (2003)</i>	

Meetings	Studies/research/working papers	Other activities
	<i>Violence and stress at work in the transport sector (2003)</i>	
	<i>Restructuring: How to deal with workers' insecurity feelings? (2003)</i>	
<i>Transport equipment manufacturing (TEM)</i>		
<i>Shipbreaking</i>		
Technical consultation on draft guidelines on OSH in shipbreaking, Geneva (November 2002)		
OSH and shipbreaking, Turkey (September 2003)		
Interregional Tripartite Meeting of Experts on Safety and Health in Shipbreaking for Selected Asian Countries and Turkey, Bangkok (October 2003)		
<i>Utilities</i>		
Tripartite Meeting on Challenges and Opportunities Facing Public Utilities, Geneva (May 2003)	<i>Public-private partnerships in the utilities sector (forthcoming)</i>	
<i>Services sectors – general</i>		
Meeting of Experts to Develop a Code of Practice on Violence and Stress at Work in Services: A Threat to Productivity and Decent Work, Geneva (October 2003)		

Part II. Programme planning, 2004-05

Sectors

HIV/AIDS: A sectoral approach to HIV/AIDS at the workplace

Action programme

- Develop and agree objectives, building on December 2003 interregional meeting
- Obtain examples of successful sectoral programmes and good practices
- Modify education and training manual to meet specific sectoral needs
- Identify candidate countries and sectors
- Set up national tripartite steering committees
- Develop and agree activities, focusing on safety and health committees, labour/factory inspectorates, training, capacity building
- Carry out programme of activities
- Evaluate activities

Agriculture

Action programme

- National tripartite activities to promote the Safety and Health in Agriculture Convention, 2001 (No. 184)
- Training activities on improving occupational safety and health at the workplace through social dialogue
- Improving safety and health in rural communities: Adaptation of WIND methodology (developed in South-East Asia) to other regions
- Publication on freedom of association in agriculture
- Publication on collective bargaining in agriculture

Basic metals

- Promotion in national workshops of codes of practice on safety and health in the non-ferrous metals industries and safety and health in the iron and steel industry
- Research for revised iron and steel code of practice: preparation of draft revised text
- Meeting of Experts to revise code of practice on safety and health in the iron and steel industry (2005)
- Publication of non-ferrous metals code of practice in Farsi and Hindi, and of iron and steel code of practice in English, French, Spanish and other languages, as appropriate

Chemicals

- Collect and disseminate examples of best practices in communicating corporate changes and restructuring in the chemicals industries
- Study national regulations governing work flexibility measures to cope with increased competitiveness, employability and economic growth
- Integrating best practices into education and training programmes to stimulate the ability of enterprises to keep abreast of continual change
- Comparative studies on vocational training in developing countries, transition economies and developed countries
- Working paper on best practices for promoting good industrial relations in the chemical industries
- Promotion of ILO Conventions related to occupational safety and health in the chemical industries

Commerce

- Finalization and tripartite vetting of a manual on social dialogue in commerce
- Regional or national tripartite meetings for the dissemination of the conclusions and recommendations of the tripartite meeting on the employment effects of mergers and acquisitions in commerce (2003)
- Assistance to governments and the social partners to develop capacity for social dialogue on the employment effects of mergers and acquisitions and related restructuring

Construction*Action programme*

Countries proposed (one or more): Barbados, Brazil, Egypt, Ghana, India, United Republic of Tanzania

Global objectives:

- Create an enabling environment for the sustainable development of the construction industry
- Support workers' rights and raise the quality of jobs in construction
- Increase investment and employment in the sector

Activities to be clustered as follows:

- formalizing the informal (improved regulation of contractors, subcontractors and workers)
- improving occupational safety and health
- training for work in construction
- initiatives to support employment creation

Tripartite consultations to decide national priorities/detailed action plans

Implementation, monitoring and assessment with a view to replication

Education*Action programme*

- Initial tripartite consultations concerning proposed activities to implement the action programme
- Consultations with representatives of international teachers' organizations and with intergovernmental organizations on proposed action programme activities
- Preparation of a workplan and budget for action programme implementation (January 2004)
- Preparation and dispatch of letters to ministries of education of member States inviting indications of interest to participate in the action programme (January 2004)
- Consultation with government regional co-ordinators and representatives of the Employers' and Workers' groups of the Governing Body on implementation progress (February 2004)
- Consultations with multi-bilateral and bilateral funding organizations on prospective financial support (February-March 2004)

Financial services*Action programme*

- Promote best practices in outsourcing and relocation of work in the context of global restructuring in financial services
- Assist ILO constituents in target countries to design and implement strategies to maximize the employment opportunities generated by offshore outsourcing and to promote social dialogue on the issue among the tripartite constituents in source countries to minimize its negative consequences for employment
- Research on employment impacts in two major source countries and three destination countries. Develop training products for national tripartite workshops and seminars to promote consensus on socially responsible restructuring of enterprises in the context of outsourcing and jobs relocation
- National workshops on better integration of the principles confirmed in the ILO Declaration on Fundamental Principles and Rights at Work, as well as those in the MNE Declaration
- Technical advisory services to review national labour legislation and its application to the new outsourcing regime
- Further activities on the employment impact of restructuring

Food, drink, tobacco

- Subregional workshop on social dialogue in the tobacco sector in ten CIS countries (Kiev, May 2004)
- Workshop(s) on developing small and medium enterprises in the food and drink industries in selected countries of the Caribbean, based on research findings
- Workshop on the future of employment in the tobacco sector in selected countries of MERCOSUR
- Publication of three studies on the food and drink sector (Guyana, Burkina Faso, Costa Rica/Nicaragua)
- National workshop(s) to promote decent work and social dialogue in the food and drink sector (Guyana, Burkina Faso, Costa Rica)
- Technical input to the UN Ad Hoc Inter-agency Task Force on Tobacco Control

Forestry and wood

- Develop draft guidelines for labour inspection in forestry (early 2004)
- Expert meeting to review, amend and adopt the guidelines (early 2005)
- Follow-up activities to promote the use of the guidelines and provide practical training

Health services

- Piloting of "Social dialogue in the health services: A tool for practical guidance" and development of training materials
- Publication of national case studies on: (a) social dialogue in the health services in Brazil, Bulgaria, Ghana and Uganda; and (b) Philippines' health worker migration
- Continue ILO contribution to ILO/ICN/WHO/PSI joint programme on workplace violence in the health sector
- Promotion of ILO code of practice on HIV/AIDS and the world of work and training materials in the health services sector

Hotels, catering and tourism***Priorities***

- *Action Programme: Addressing crises and creating more and better jobs in the hotel, catering and tourism sector*
 - Tourism Labour Accounts System (TLAS)
 - Manual on social indicators for sustainable tourism development (country studies on good practices related to the Decent Work Agenda; subregional workshops)
 - Manual on promoting social dialogue to prevent and manage employment crises (country studies; subregional workshops)
- *HCT in multi-sectoral action programme on HIV/AIDS*
 - Activities in tourism-dependent developing countries and subregions such as: Central America, Caribbean, Ethiopia, Sao Tome and Principe, South Africa

Other

- Technical input on employment issues in tourism industries to World Tourism Organization Conference on analysing tourism in the global economy (2005)
- Regional tripartite meeting on employment in the hotel, catering and tourism industry for the Americas (to be held in a Caribbean country)
- Technical cooperation on human resources development in tourism: Nigeria, South Africa

Mechanical and electrical engineering (MEE)

- Export processing zones. Update of one-stop window
- Working paper on cost-benefit analysis in EPZs

Media, culture, graphical

- Tripartite Meeting on the Future of Work and Quality in the Information Society: The Media, Culture, Graphical Sector, Geneva, 18-22 October 2004

- Possible ILO, UNCTAD and UNESCO project on poverty reduction through employment creation and trade expansion in creative industries in selected developing countries
- Activities on child performers working in the entertainment industry
- Nineteenth ordinary session of the ILO/UNESCO/WIPO Intergovernmental Committee of the International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations (Rome Convention of 1961), Paris, 2005
- World Summit on the Information Society, second phase, Tunis, 2005

Mining

- A national workshop on HIV/AIDS at the workplace in several countries in Africa and Asia (see action programme)
- Research on the links between working time and OSH
- Translation into Thai of handbook on safety and health in small-scale mines
- Participation in World Bank/DfID small-scale mining programme (CASM)
- Publication of a chapter on small-scale mining in externally published book
- Promotion of Convention No. 176
- Collaborate with IPEC in small-scale mining programmes

Gemstones

- Production of a handbook on OSH in diamond and gemstone cutting and polishing operations
- Publication of handbook in Hindi and Thai

Oil and gas

- Programmes and meetings on promoting social dialogue and strengthening social partners' and government's negotiating skills to deal with HIV/AIDS, multicultural situations, mergers and acquisitions, improving OSH and social protection in the oil and gas extraction and production sector in Arab States (i.e. Bahrain, Iraq, Kuwait), oil and gas producing countries in Asia (i.e. China, Iran, Kazakhstan) and Africa
- Study ways to promote social dialogue in the oil and gas sector in the workplace, at international, regional and national level
- Working paper on good industrial relations practices and outcomes, particularly in relation to corporate restructuring, and information on good health and safety practices and results in the oil and gas extraction and production and oil refining industry

Postal and other communications services

- Follow-up on the Joint ILO/UPU Regional Seminar on Social Dialogue in Postal Services in Latin America
- Possible joint ILO/UPU regional seminar on social dialogue in postal services for French-speaking Africa and for English-speaking Africa, 2005
- Twenty-third Universal Postal Union Congress, Bucharest, 2004

Public services

- Finalize the draft practical guide based on feedback from national workshops (Ghana and India). Disseminate among tripartite constituents. Apply it in national training programmes
- Promote the *Guidelines on social dialogue in public emergency services*; publish draft working papers
- National workshops to develop national strategies for better implementation of the *Guidelines*
- Possible project on the promotion of social dialogue and better governance relating to public service reform and quality public service delivery

Shipping, ports, fisheries, inland waterways

Shipping

- Preparatory Technical Maritime Conference (September 2004)
- Maritime Session of the International Labour Conference (September 2005)
- Regional tripartite symposium on maritime labour standards in Alexandria, Egypt (October 2004)

Ports

- Activities relating to the development and publication of a guidance manual on social dialogue in the process of structural adjustment and private sector participation in ports
- ILO/ITC project in the Russian Federation entitled "Improvement of safety and health and working conditions in the maritime industry"
- Promotional activities to eliminate gender discrimination in the port sector

Portworker Development Programme (PDP)

- Promotion of PDP
- Amendment of PDP licence agreement to include reporting requirements
- Renewal of expired PDP licences
- Distribution of revised PDP Unit P.3.1 to all licensees
- Translation of the revised PDP Unit P.3.1 into Spanish and other languages
- International training course for PDP instructors
- Update/revise the PDP Chief Instructor's Manual
- Launch activities for the expansion of PDP for bulk terminals
- Corrections to PDP training material

Security, safety and health in ports

- Publish and promote the code of practice on security in ports and on safety and health in ports
- Develop training materials related to the implementation of the code of practice on security in ports and on safety and health in ports
- Collaborate with IMO to provide technical assistance to developing countries for the joint implementation of the IMO/ISPS (International Ship Port interface Security) Code and the ILO/IMO code of practice on security in ports
- Translation of the code of practice on security in ports and on safety and health in ports into more languages
- Take steps to establish a tripartite platform for monitoring the implementation and updating of the code of practice on security in ports and on safety and health in ports

Other activities

- Promotion of the Occupational Safety and Health (Dock Work) Convention, 1979 (No. 152)
- Testing and publication of "Port health and safety audit manual"
- Research on an integrated approach to work in ports

Fishing

- Preparation of a comprehensive standard on conditions of work in the fishing sector
- Finalization of FAO/ILO/IMO codes on safety and health of fishers and safety of fishing vessels and their equipment
- Promotion of improvement of conditions of work in the fishing sector

Textiles, clothing, leather and footwear

Action programme

- Tripartite consultations; selection of countries; define role and function of tripartite steering group, and sequence of implementation phases
- National tripartite consultations in selected countries
- Establish national tripartite steering committee (TSC) to draw up a plan of action for the social partners and guide implementation
- Formal adoption of a plan of action by a high-level tripartite national workshop
- TSC will monitor the implementation phase, in close collaboration with the ILO
- Evaluation meeting

Transport

Civil aviation

- Strengthen cooperation between ICAO and the ILO
- Tripartite workshop on the future of civil aviation in Africa: Restructuring and social dialogue (October 2004)

Subject to availability of resources:

- A tripartite meeting in Geneva to facilitate social dialogue on ways to manage the cyclical path of the civil aviation industry to develop guidelines for the future (early 2005)
- A tripartite workshop on freedom of association for air traffic controllers (2005)

Road transport

- Promotion of the "ILO code of practice on HIV/AIDS and the world of work" and training materials in the road transport sector
- Promotion of the "ILO code of practice on workplace violence in services sectors and measures to combat this phenomenon" in the road transport sector

Rail transport

- Promotion of the "ILO code of practice on workplace violence in services sectors and measures to combat this phenomenon" in the rail transport sector
- Initiate consultations on the possible development of a code of practice on railway safety and health

Transport equipment manufacturing (TEM)

- Small meeting on the auto parts (supplier) industry, 2005
- Feasibility study on setting up a database for the TEM and MEE industries
- Publication on the auto industry

Shipbreaking

- National workshops to implement guidelines on safety and health in shipbreaking in Bangladesh, China, India, Pakistan and Turkey
- Joint working party under discussion with IMO and the secretariat of the Basle Convention

Utilities

- Project in five Central Asian countries on effective social dialogue mechanisms in public utilities
- Publication on Democracy and public-private partnerships

Cross-sectoral activities

- Promotion of the code of practice on workplace violence in services sectors and measures to combat this phenomenon in the following sectors: commerce; education; financial services; professional services; hotels, catering, tourism; media and entertainment; postal services; public emergency services; and utilities
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Part III. Overview of sectors

Agriculture, plantations, other rural sectors

Global trends and issues

Agriculture drives the economy in many developing countries, but the rural sector is often starved of the investment needed to generate growth and jobs. Poverty, low levels of education, unsafe working conditions and poor health all contribute to low labour productivity in agriculture which, in turn, perpetuates the cycle of rural poverty. Lack of access to basic health care and social safety nets means that illness, disability or death plunges rural families further into poverty. Rural households are increasingly headed by women, as men migrate to cities in search of a better living. Employment policies, which promote rural off-farm employment, spur the development of small and medium enterprises, particularly in rural areas, and orient investment towards employment-intensive rural infrastructure development, are key factors in stemming outward migration to urban centres and easing the transition from a largely agrarian society to one more based on industry and commerce.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Poverty ■ Severe decent work deficits ■ Productivity and food security ■ Global trade issues 	<p>Total workforce: An estimated 1.3 billion. Approximately 450 million are waged workers, many employed on a temporary basis</p> <p>Employment: Agricultural workers account for less than 7 per cent of the workforce in OECD countries, but over 60 per cent of the economically active population in South Asia and sub-Saharan Africa. Women constitute about 44 per cent of the agricultural labour force in developing countries and their share is growing</p> <p>Gender: Agricultural tasks tend to be highly sex-segregated. Women earn less than men, are less likely to be engaged on a regular basis, are less likely to belong to trade unions and are subject to harassment from co-workers and supervisors</p> <p>Child labour: The incidence of child labour in agriculture is the highest of any economic sector. According to ILO surveys, some 70 per cent of working children are engaged in agriculture, with higher rates for girls than for boys</p> <p>Safety and health: Agriculture is ranked as one of the three most hazardous occupations. More than half of all workplace fatalities (170,000) occur in agriculture. Some 40,000 of these deaths result from pesticide poisoning</p> <p>Investment: Official development assistance to least developed countries declined by 45 per cent between 1990 and 2000. Although total foreign direct investment rose by 336 per cent between 1988 and 1999, the portion destined to agriculture fell from 0.2 per cent of the total to 0.1 per cent</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Safety and Health in Agriculture Convention, 2001 (No. 184) (3 ratifications) ■ Rural Workers' Organizations Convention, 1975 (No. 141) (38) ■ Labour Inspection (Agriculture) Convention, 1969 (No. 129) (41) ■ Plantations Convention, 1958 (No. 110) (12) ■ Holidays with Pay (Agriculture) Convention, 1952 (No. 101) (46) ■ Minimum Wage Fixing Machinery (Agriculture) Convention, 1951 (No. 99) (53) ■ Promotion of Cooperatives Recommendation, 2002 (No. 193) ■ Tenants and Sharecroppers Recommendation, 1968 (No. 132) 	<ul style="list-style-type: none"> ■ Unionization rates among farm workers are low in most countries. Plantation workers in some Asian and African countries tend to be better organized ■ In some countries, agricultural workers are either fully or partially excluded from legislation guaranteeing the right to freedom of association and collective bargaining ■ Restrictions on trade union activities in some countries make it difficult or impossible to organize seasonal, temporary and casual workers, or those working in small enterprises ■ The ILO Committee on Freedom of Association has examined dozens of complaints related to the agriculture sector, involving mass dismissals, anti-union discrimination and non-recognition of unions 	<ul style="list-style-type: none"> ■ Sustainable agriculture in a globalized economy (2000)

Basic metal production

Global trends and issues

Basic metal consumption, prices and therefore production are closely linked to the state of the economy. Low metal prices often lead to cost-cutting that affects the amount and nature of employment and work arrangements. Recycling is a key component of basic metal production, especially of non-ferrous metals. Automation and IT are resulting in fewer people working near metals and machinery, but they call for higher skills.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Employment ■ Training ■ Working conditions ■ Contract labour ■ Safety and health, particularly in small-scale plants in developing countries, notably foundries and steel production associated with shipbreaking 	<p>Countries: About 40 major steel-producing countries. The top ten account for about 70 per cent of world production. For non-ferrous metals, concentration is similar or higher with 25-40 countries producing significant amounts of the major metals, and the top five accounting for 50-60 per cent of total production in each case. Proportion of state-owned facilities continues to decline. Social impact of past privatization still being felt in some areas</p> <p>Share of GDP: Difficult to isolate. Included in "manufacturing"</p> <p>Employment: About 6-7 million; approximately 70 per cent in iron and steel production. Employment continues to fall – by 23 per cent in 22 steel-producing countries in 1995-2002, while steel output increased by over 70 per cent</p> <p>Gender: Basic metal production is male-dominated. Women workers, perhaps 10-15 per cent of the workforce, are concentrated in R&D and administration</p> <p>Organization: Rates of unionization remain relatively high, especially in former state-owned enterprises. New "green field" plants, however – especially iron and steel "mini mills" – are often not unionized. The same company can have unionized and non-union facilities in different locations</p> <p>Child labour: Exists in the small-scale foundry sector in developing countries, but is less prevalent than in other sectors</p> <p>Safety and health: The incidence of accidents and disease mirrors that of the manufacturing sector. Risks of severe injuries are generally higher, however, due to the presence of molten metal, toxic chemicals and by-products</p>

Relevant ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Two codes of practice on safety and health cover iron and steel (1983) and non-ferrous metals (2003). The former will be revised in 2005. The latter is available in five languages (Chinese, English, French, Russian and Spanish), with other translations being considered ■ Other codes of practice – chemicals, ambient factors in the workplace – are very relevant for basic metals production 	<ul style="list-style-type: none"> ■ Generally well established ■ Globalization of basic metal production is paving the way for inter-company social dialogue on a range of issues 	<ul style="list-style-type: none"> ■ Safety and health in the non-ferrous metals industries (2001)

Chemical industries

Global trends and issues

Chemical companies are undergoing corporate change and are restructuring. Flexible work practices have been widely accepted and are replacing life-time employment. The chemicals industry is male-dominated but the number of women workers has been increasing in some countries. Equal opportunities have not yet been fully achieved. The average age of workers has increased while the industry is attracting fewer qualified young workers.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Security of employment and employability ■ Social security ■ Work/life balance ■ Gender mainstreaming ■ Training and further training ■ Developing universal certified skill standards ■ Outsourcing ■ Flexibility 	<p><i>Countries of importance:</i> All regions and countries are significant</p> <p><i>Share GDP:</i> In 2003 the chemical industry contributed 2.4 per cent of GDP in the EU</p> <p><i>Employment:</i> Over 16 million in 1999; 16.5 per cent of the total manufacturing workforce</p> <p><i>Gender:</i> Women make up about 20 per cent of the workforce</p> <p><i>Organization:</i> Less than 20 per cent</p> <p><i>Safety and health:</i> In 2000, 59 fatal accidents in the 35 major chemical producing countries</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Chemicals Convention, 1990 (No. 170) (11 ratifications) ■ Prevention of Major Industrial Accidents Convention, 1993 (No. 174) (8) 	<ul style="list-style-type: none"> ■ Social dialogue has gained considerable momentum, particularly at the European level ■ ICEM and ICCA made headway with consultations to establish social dialogue structures/mechanisms ■ Responsible care programme functions on basis of dialogue between employers' and workers' organizations ■ International framework agreement, dialogue initiative and inter-company networks established 	<ul style="list-style-type: none"> ■ Best practices in work flexibility schemes and their impact on the quality of working life in the chemical industries (2003)

Commerce

Global trends and issues

The last two decades have seen a global trend towards consolidation and rationalization – often through mergers and acquisitions. Large companies are growing and small firms are being pushed towards survival strategies. Cost-cutting has an impact on employment and working conditions. Shops are extending opening hours. As national markets have become saturated in many developed countries, businesses have looked for new opportunities to expand into less developed markets.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Impact of technology and consolidation on employment, nature of work and work organization ■ “Lean” or minimum staffing levels. High part-time rates to facilitate deployment of more people during peak periods. Fragmentation of employment and working time ■ Longer opening hours affect employment and working conditions 	<p>Countries of importance: Most developed countries and emerging economies. Structure and functioning of sector varies greatly according to living standards, consumption, purchasing habits and legal regulations dealing with the size of firms, shop-opening hours, consumer protection</p> <p>Share of GDP: Approximately 15 per cent in most countries</p> <p>Employment: Distribution is labour-intensive. The sector accounted for a considerable share of total employment: 16 per cent in the European Union (EU); 19 per cent in the United States; and 18 per cent in Japan. In Central and Eastern Europe the share of commerce in total employment is comparatively low, but it is increasing rapidly</p> <p>Gender: On average, the proportion of women employed in commerce is higher than for the economy as a whole. The highest participation is in Latin America and in countries undergoing economic transition. At the EU level, the share of women in retailing employment is 58.5 per cent</p> <p>Organization: Among the least unionized industries in many countries (prevalence of SMEs). High labour turnover and a high proportion of part-time and temporary employees</p> <p>Child labour: Prevalent in the informal sector. Statistics unavailable</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Hours of Work (Commerce and Offices) Convention, 1930 (No.30) (30 ratifications). ■ Weekly Rest (Commerce and Offices) Convention, 1957 (No. 106) (62) ■ Hygiene (Commerce and Offices) Convention, 1964 (No. 120) (49) 	<ul style="list-style-type: none"> ■ Prevalence of collective bargaining institutions and mechanisms ■ Structural change in commerce has had an impact on collective bargaining and, more generally, on social dialogue ■ Since the establishment of their social dialogue in 1985, the European social partners for commerce have been working closely together on employment policy matters, resulting in the signing of a memorandum on vocational training in the retail trade and a Joint opinion on employment. In the context of EU enlargement, they have been working with the social partners for commerce in the applicant countries to promote industrial relations meetings 	<ul style="list-style-type: none"> ■ Employment effects of mergers and acquisitions in commerce (2003)

Construction

Global trends and issues

In the past 30 years the construction industries, particularly in developed countries, have experienced strong trends towards casualization of employment and the outsourcing of labour. There is little chance that the current trends in employment practice will be reversed in the foreseeable future.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Casualization of employment ■ Extensive subcontracting of labour ■ Weakening and division of the labour force ■ Extensive privatization ■ Fewer projects commissioned by public sector clients ■ The loss of public sector jobs ■ Decline in membership of worker and employer organizations ■ Erosion of social dialogue ■ Fewer collective bargaining agreements (CBAs) ■ Lack of economic security ■ Lack of social security and accident insurance ■ Deterioration of safety and health of the construction workforce in line with the terms and conditions of employment ■ Decline in level of skills ■ Joint training schemes undermined 	<p>Share of GDP Construction output expands and contracts in line with economic growth. It is generally between 2 per cent and 8 per cent of GDP but can rise to 10 per cent. The outputs of the construction sector are important investment goods, comprising around 50 per cent of gross fixed capital formation</p> <p>Employment: Around 111 million (1998). 75 per cent of the total workforce is in developing countries</p> <p>Gender: Wide variation in estimates. Official Indian figure for the proportion of women is 8 per cent, but in reality it is up to 50 per cent. 90 per cent are employed as casuals (compared with 75 per cent of the men). Most do not appear on any contractor's payroll</p> <p>Child labour: Little information available. Large numbers work in various building materials industries</p> <p>Organization: Union density low in developing countries; downward trend in developed countries. In the United States, union membership fell from 42 per cent in 1970 to 18 per cent in 1996. In Spain it was 10 per cent in 1997 compared with 18 per cent in the economy as a whole</p> <p>Safety and health: No data for developing countries. Estimates of deaths worldwide from construction accidents between 55,000 and 100,000. Additional deaths from exposure to hazardous substances, including asbestos</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Safety and Health in Construction Convention, 1988 (No.167) (16 ratifications) ■ Asbestos Convention, 1986 (No.162) (26) ■ Labour Clauses (Public Contracts) Convention, 1949 (No. 94) (59) 	<ul style="list-style-type: none"> ■ Collective bargaining undermined by trend to outsourcing and casualization of labour ■ Multi-employer agreements often applied to only 'core' workers or local workers ■ In many developing countries collective agreements generally apply to a small and declining proportion of the workforce 	<ul style="list-style-type: none"> ■ Construction industry in the twenty-first century: Its image, employment prospects and skill requirements (2001)

Education

Global trends and issues

A major international campaign to achieve education for all (EFA) targets in all countries by 2015 is underway. Many countries are still facing teacher shortages. Lifelong learning strategies are being explored in many countries, but progress is slow due to legislative, political and financial constraints. Information and communications technologies (ICT) use in education is increasing substantially, but developing countries face many constraints. Access to quality education and training is an increasingly critical component in efforts to develop human capital, ensure employability, especially for youth (school to work transition), and to eliminate child labour.

Main issues for the ILO	Specific data
<p>Achievement of EFA targets:</p> <ul style="list-style-type: none"> ■ Implementation of lifelong learning systems, including adequate and equitable financing ■ Increased and effective application of ICT to education ■ Educational decentralization based on partnerships, democratic structures and all stakeholder viewpoints ■ Recruitment, maintenance in service and equitable deployment of enough qualified teachers ■ Professional standard initial teacher education and lifelong professional development ■ Adequate teachers' salaries ■ Measures to deal with the impact of HIV/AIDS and overcome gender imbalance ■ Improve quality teaching and child-centred learning environments ■ Raise and/or maintain high professional standards for teachers, including codes of ethics ■ Strengthen and institutionalize social dialogue mechanisms ■ Teacher recruitment ■ Professional development standards, including ICT use ■ Teachers' salaries ■ Teaching and learning environment (hours, class size, violence and stress) ■ Workplace strategy to reduce the impact of HIV/AIDS ■ Social dialogue in education – information, consultation, collective bargaining 	<p>Share of GDP: Expenditure on education in OECD countries: 5.8 per cent. Non-OECD: 1-10 per cent</p> <p>Employment: Over 60 million in formal education (estimated, late 1990s); non-formal educators not known</p> <p>Gender: Higher percentages of women are teachers in more developed and transition countries and at lower levels of education. Regions with the lowest percentage are sub-Saharan Africa, Arab States and South Asia. With regional exceptions: 50-100 per cent female in pre-primary; 35-90 per cent in primary; 30-70 per cent in secondary; 10-55 per cent in tertiary</p> <p>Organization: Education sector unions often represent the largest single group of organized public sector employees. Membership in affiliates of the three principal international teachers' organizations is about 30 million (40-50 per cent of formal sector teachers)</p> <p>Safety and health: Teachers are especially susceptible to physical illnesses as a result of their jobs. Largest single health and safety issue is stress and burnout. 25-33 per cent of all teachers suffer high levels of stress. Psychological and physical violence have increased in recent years; estimates of teachers affected range from 2 to 6 per cent in several countries (France, Japan and the United States)</p>

ILO instruments	Social dialogue	Recent sectoral/related meetings
<ul style="list-style-type: none"> ■ ILO/UNESCO Recommendation concerning the status of teachers, 1966 ■ UNESCO Recommendation concerning the status of higher-education teaching personnel, 1997 	<ul style="list-style-type: none"> ■ Social dialogue is relatively important and institutions well developed in most European, North American and some South American countries. Elsewhere they are weak or non-existent 	<ul style="list-style-type: none"> ■ Seventh and Eighth Sessions of the Joint ILO/UNESCO Committee of Experts on the Application of the Recommendations concerning Teaching Personnel (2000, 2003) ■ Lifelong learning in the twenty-first century: The changing roles of educational personnel (2000)

Financial services, professional services

Global trends and issues

Rapid deployment of information technology and the liberalization of capital flows have led to tremendous growth in international transactions and the interpenetration of banking operations across borders. Competition has also led to greater awareness of costs and of the productivity gains to be realized from a reorganization of work. Extensive worldwide restructuring means that services are increasingly outsourced from different countries. Over the next few years, significant numbers of banking positions could migrate offshore.

Main issues for the ILO	Specific data	
<ul style="list-style-type: none"> ■ Impact of restructuring ■ Deregulation, liberalization and market integration ■ Effects of new technologies on employment, nature of work and work organization ■ Training and human resource development and management ■ The role of social dialogue in the context of restructuring 	<p>Countries of importance: All the developed market economy countries, other developed countries and major emerging economies</p> <p>Share of GDP: Varies considerably. In the United States, financial services contribute about 17.5 per cent to GDP</p> <p>Employment: About 3 million; on the decline, especially in industrialized countries</p> <p>Gender: During the 1970s and early 1980s, the finance sector was an important source of women's employment everywhere. Competition, the increased introduction of labour-saving information technologies, and the shift from traditional finance jobs to sales and customer service meant that women's jobs were considerably affected, particularly in areas with a high proportion of female employees, such as administration and branch operations</p> <p>Organization: Financial services are among the least unionized industries in many countries</p> <p>Safety and health: The incidence of work-related stress is increasing</p>	
ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Hours of Work (Commerce and Offices) Convention, 1930 (No. 30) (30 ratifications) ■ Weekly Rest (Commerce and Offices) Convention, 1957 (No. 106) (62) ■ Hygiene (Commerce and Offices) Convention, 1964 (No. 120) (49) 	<ul style="list-style-type: none"> ■ Prevalence of collective bargaining institutions and mechanisms ■ Accelerating pace of structural change in financial services – its impact on relations between employers and workers, and on social dialogue, including collective bargaining ■ Social dialogue and collective bargaining vary considerably among countries 	<ul style="list-style-type: none"> ■ The employment impact of mergers and acquisitions in the banking and financial services sector (2001) ■ Promoting social dialogue on financial services restructuring in Latin America (Buenos Aires, 2003) ■ Social dialogue on mergers and acquisitions and restructuring in financial services for selected Asian countries (Manila, 2002)

Food, drink, tobacco

Global issues

These industries are a mix of major multinational companies and a plethora of SMEs, even in industrialized countries. Some leading tobacco companies have been acquiring food companies. Mergers and acquisitions, the introduction of new technologies, relocation and transfer of jobs, and tobacco control policies largely account for the decline in employment in the last decade. Technological advances in processing plants in industrialized countries and a marked shift away from the formal sector to informal sector production in developing countries point to further employment stagnation or loss. Food safety crises as well as litigation have also challenged the image of the sector.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Growth in food and drink manufacturing in wealthy countries, but sharp regression in poorer countries ■ New technology, mergers and acquisitions and relocation lead to job losses ■ Rapid informalization in poorer countries ■ Food safety crises, litigation and image of the sector ■ Contradiction between health and employment policies ■ Working conditions and earnings of vulnerable groups ■ The role of the sector within the framework of sustainable development ■ Deregulation ■ Impact on employment of tobacco control policies 	<p>Countries of importance:</p> <p><i>Tobacco:</i></p> <p>Leading producers of cigarettes: Brazil, China, Germany, India, Indonesia, Japan, Republic of Korea, Russian Federation, Turkey, United Kingdom and United States</p> <p>Leading tobacco-producing countries: Brazil, China, India, Indonesia, United States and Zimbabwe</p> <p>Employment (2001-02): Figures for manufacturing only. Over 21 million in the food, drink and tobacco sector, representing about 20 per cent of total manufacturing workforce</p> <p>1.2 million in tobacco manufacturing; steady decline in industrialized countries</p> <p>Over 40 million workers in 14 major tobacco growing producers</p> <p>Gender: Women workers constitute approximately 21 per cent of total, with either stability or steady increases over the last decade, especially in transition countries. Predominance of women (as well as children) in tobacco manufacturing, leaf growing and processing. Women workers predominate in bidi production in India and kretek in Indonesia</p> <p>Child labour: Significant, both in growing and processing (in both developing and some transition countries). Common in bidi (tobacco sector) production. Extent not measured</p> <p>Other vulnerable groups employed in sub-standard conditions: migrant workers, ethnic and religious minorities</p> <p>Organization: Two million according to the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF)</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Home Work Convention, 1996 (No. 177) (4 ratifications) ■ Worst Forms of Child Labour Convention, 1999 (No. 182) (147) ■ Safety and Health in Agriculture Convention, 2001 (No. 184) (3) ■ The Framework Convention on Tobacco Control, adopted by the World Health Assembly (2003) 	<ul style="list-style-type: none"> ■ International framework agreements between global union federation and Danone and Del Monte Fresh Produce recognize the right of workers employed by the companies and subsidiaries to join unions of their choice ■ Capacity building for social partners required to enable them to engage effectively in social dialogue 	<ul style="list-style-type: none"> ■ The future of employment in the tobacco sector (2003)

Forestry, wood, pulp and paper

Global trends and issues

Many countries, especially in the Asia region, have developed or are developing national codes of best practice in forestry. During the XII World Forestry Congress in 2003, considerable attention was paid to social issues which have hitherto gone unnoticed in forestry circles. Social justice and benefits for forest workers are key areas for intervention. Improved institutions and procedures for participation of the social partners in decision-making are also important, as is participation of different stakeholders.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Falling or stagnating employment in practically all industrialized countries, despite substantial growth in production ■ Impact of globalization 	<p>Countries of importance: Major exporters of forest products: Canada, Finland, Germany, Indonesia, Sweden and United States</p> <p>Major importers: France, Germany, Italy, Japan, United Kingdom and United States</p> <p>Some large producers/exporters of solid wood products do not produce much timber themselves, e.g. Germany, Italy, Japan, Republic of Korea and Taiwan (China)</p> <p>Pulp and paper industries account for 2-3.5 per cent of GDP in countries like Brazil, Canada and Sweden</p> <p>Share of GDP: Forestry accounted for about 0.4 per cent of world GDP in 1991. The contribution of wood industries alone to GNP varies from less than 1 per cent to over 20 per cent</p> <p>Employment: Total forest-based employment (including primary extractive and secondary manufacturing) is about 47 million full-time workers. Only about 17 million are in the formal sector</p> <p>Gender: Almost no gender-specific data. Women in forestry tend to be in low-status, low-paid work. Equality of treatment is an important issue</p> <p>Organization: Trade unions rare in forestry. Dispersed workforce, geographically mobile, sometimes seasonal. The number of unionized workers (e.g. in larger enterprises) is falling steadily. In the formal wood industries subsector, levels of organization are usually in line with those in other manufacturing industries. The pulp sector, with its large units, is highly organized both among workers and employers. Less true for paper</p> <p>Child labour: Child labour in industrial logging and charcoal making has been reported in Brazil</p> <p>Safety and health: Forestry, in particular logging, is one of the most dangerous occupations in almost all countries. While there are signs of decreasing accident levels, in some instances the safety and health situation has deteriorated, as in Central and Eastern European countries</p>

ILO instruments	Social dialogue	Recent sectoral meetings
■ Code of practice on safety and health in forestry work (1988)	■ Institutions of social dialogue and the organizations involved often weak ■ Unionization rates are low ■ The trend towards outsourcing has complicated organization and the establishment of social dialogue ■ Absence of women in local networks, associations and trade unions	■ Social and labour dimensions of the forestry and wood Industries on the move (2001)

Health services

Global trends and issues

Health services are important to all member States and figure among the Millennium Development Goal priorities. Inefficiencies in allocating human, material and financial resources affect health systems in many countries, leading governments to rethink basic premises of health care systems. Demographic and epidemiological conditions are expected to lead to increased demands on health services, and therefore employment growth. However, increasing costs of health care services, structural adjustment policies and cost-containment measures are likely to impact negatively on employment, working conditions and career prospects of health personnel, affecting the numbers of trained personnel, access to and quality of services. Increased migration of skilled staff, especially doctors and nurses, has resulted from shortages in many developed countries.

Main issues for the ILO	Specific data	
<ul style="list-style-type: none"> ■ Employment and training ■ Shortages and migration of skilled personnel ■ Working conditions ■ Safety and health, especially violence ■ Impact of HIV/AIDS on trained staff ■ Social dialogue 	<p><i>Countries of importance:</i> Health services important and present in all ILO member States</p> <p><i>Share of GDP:</i> Developed countries: 8.4 per cent of GDP. Many developing countries spend less than 1 per cent of GNP on health</p> <p><i>Employment:</i> 35 million worldwide and increasing</p> <p><i>Gender:</i> Workforce is mostly female. Women tend to predominate at the bottom of the hierarchy in terms of authority, remuneration and qualifications despite legally accorded equal treatment. Women health workers more likely to be victims of sexual discrimination and violence</p> <p><i>Safety and health:</i> A large number of special hazards and risks, including new diseases such as SARS; violence at work a specific and growing hazard</p>	
ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Nursing Personnel Convention, 1977 (No. 149) (37 ratifications) ■ Medical Care Recommendation, 1944 (No. 69) 	<ul style="list-style-type: none"> ■ Not well established. The ILO has developed a guidance tool and has organized pilot national workshops on social dialogue in health services 	<ul style="list-style-type: none"> ■ Social dialogue in health services: Institutions, capacity and effectiveness (2002)

Hotels, catering, tourism

Global trends and issues

The hotels, catering, tourism (HCT) sector benefited from high growth rates globally during the 1990s in both international and domestic travel and tourism. In Asia, growth has stagnated since 1997 and since 2001, a marked crisis of the HCT sector has set in almost everywhere. Efforts to manage the crisis have not focused on mitigating social impact. Employment in the sector is stagnating or shrinking, partly due to rapid increases in productivity.

Main issues for the ILO	Specific data	
<ul style="list-style-type: none"> ■ Consolidation of enterprises ■ Challenges to SMEs, such as increased competition, IT and productivity ■ Training, new skills (personality related skills and multiskilling), portable skills and teamwork are required ■ High labour turnover ■ Jobs accessible to vulnerable groups (women seeking part-time work, younger workers, migrants) ■ Decent work deficits ■ Employment potential of sector underutilized 	<p>Share of GDP and employment: 3 per cent, but over 10 per cent in some developing countries. Developing countries benefit particularly from international tourism which globally represents over 7 per cent of all exports</p> <p>Gender: Up to 60 per cent of the labour force are women. More often found in low-skill and low-paid jobs. Difficult working conditions, strenuous work and unsocial, as well as varying working hours. Women often accept part-time employment, despite their need for more income</p> <p>Child labour: Found mainly in the informal tourism economy but also in family-based SMEs. Children exposed to a high risk of abuse, including sexual abuse</p> <p>Organization: About 10 per cent of HCT workers are affiliated to trade unions in industrialized countries. In most developing countries, trade unions are active in only a few larger enterprises</p>	
ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Working Conditions (Hotels and Restaurants) Convention, 1991 (No. 172) (13 ratifications) 	<ul style="list-style-type: none"> ■ Some national sectoral social dialogue institutions exist. Otherwise, social dialogue is limited to the enterprise level and to large enterprises ■ Workers and employers in SMEs are little involved in spite of their predominance ■ European works councils have become important in international hotel and catering chains 	<ul style="list-style-type: none"> ■ Regional meeting for Asia (2003) ■ Social impact of the crisis in the tourism industry: A global meeting (2001)

Mechanical and electrical engineering

Global trends and issues

Electronic equipment and components provide the hardware that drives the IT revolution. Many developing country exports originate in EPZs which account for a sizeable proportion of their exports. More and more office and telecommunications equipment (OTE) companies are licensing the production process to others, while also forming strategic alliances for research. Despite the size of the recently announced job cuts, employment growth over the past eight to ten years has been great. Nevertheless, starting in 2000, news of over 600,000 intended job cuts in the industry appeared.

Main issues for the ILO	Specific data	
<ul style="list-style-type: none"> ■ Employability. Volatile markets, technological innovations that demand regular retraining bring employability to prominence ■ Concern about freedom of association and collective bargaining in export processing zones 	<p>Countries of importance: Machine tool production is concentrated in Germany, Japan and United States, with the top ten countries accounting for 90 per cent of world production</p> <p>Ten countries produce over 80 per cent of the world's ICT equipment, mainly Japan and the United States. Significant contribution from Republic of Korea, Malaysia, Singapore and Taiwan (China). 85 per cent of the world exports of OTE come from 15 countries; developing countries account for almost half</p> <p>Importance of the sector: Of the Financial Times Global 500 list of companies, 75 are in the electronics sector</p> <p>Export performance: Office and telecom equipment account for about 13 per cent of world merchandise exports. Machinery and transport equipment (other than automobiles) accounts for another 17 per cent. Automobiles and components (many of which are electronic) account for another 10 per cent of world exports</p> <p>Gender: A large part of the workforce employed in electronics assembly is female</p>	
ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ No sectoral standards 	<ul style="list-style-type: none"> ■ The global union federation, IMF, has signed international framework agreements with four companies in the sector that call for respect for ILO core Conventions and encourage the suppliers to the companies to do the same 	<ul style="list-style-type: none"> ■ Lifelong learning (2002)

Media, culture, graphical

Global trends and issues

The core industries that make up this sector include motion pictures, recording, book, journal, newspaper and computer software publishing, music and theatre, photography, commercial art and display, broadcasting, printing, and professional sports. The boundaries of the sector are unclear, with some areas overlapping with other sectors. For example, cinemas, museums, galleries, sports venues and circuses could be included, but might overlap with the commerce and hotel, catering and tourism sectors. Multimedia convergence has led to further blurring of the boundaries.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Impact of ICT on employment, nature of work ■ Concentration of ownership in media and entertainment ■ Increased use of freelance, short-term, precarious or casual employment ■ Low coverage by social protection schemes (especially unemployment, health, retirement) ■ Disagreement over intellectual property rights of performers and writers ■ Copyright piracy, peer-to-peer distribution of media products have an impact on employment, revenues ■ Freedom of expression ■ Cultural diversity ■ Low level of social dialogue ■ Weak trade union organization ■ Violence and stress – journalists and performers ■ Child labour 	<p>Countries of importance:</p> <p>Leading countries in various subsectors include Australia, Brazil, Canada, Egypt, France, Germany, India, Italy, Japan, South Africa, Spain, United Kingdom and United States</p> <p>Share of GDP: Global value of the sector estimated at around \$900 billion in 2000 (about 2.9 per cent of GDP) and likely to rise to \$1.4 trillion in 2005. In the United Kingdom, creative industries already generate revenues of around £112.5 billion and employ 1.3 million people, approximately 10 per cent of the labour force of the United Kingdom</p> <p>Employment (by profession)</p> <p>Estimates of total workforce:</p> <ul style="list-style-type: none"> – Journalists: 3 million – Graphical: 7 million – Musicians: 6 million – Actors and dancers: 6 million – Producers, technicians, writers, etc. (media and entertainment): 4 million <p>Gender: Over 50 per cent of the workforce is female, with few women in decision-making positions</p> <p>Organization: Over 2 million affiliated to five global union federations</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ ILO/UNESCO/WIPO International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organisations, Rome (1961) (76 ratifications) 	<ul style="list-style-type: none"> ■ Prevalence of collective bargaining institutions and mechanisms ■ General weakening of collective bargaining and of collective agreements worldwide in the past 10-15 years 	<ul style="list-style-type: none"> ■ Eighteenth Ordinary Session of the Intergovernmental Committee of the International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations (Rome Convention, 1961) (2001) ■ Information technologies in the media and entertainment industries: Their impact on employment, working conditions and labour-management relations (2000)

Mining (coal, other mining)

Global trends and issues

All countries have some kind of mining operation, if only quarrying for building materials. But the number of “major” mining countries is relatively small. Some 50 countries produce significant amounts of coal but 88 per cent of world production comes from only ten, four of them in developing countries. For other traded minerals, the number of major producing countries is rather less, typically 15-20, with the top five accounting for 50-80 per cent of world output of a wide range of metallic and non-metallic minerals.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Competition. Competitiveness includes flexible working, contract labour and a highly skilled workforce ■ Environmental and sustainable development issues ■ Safety and health, employment, conditions of work, child labour, multinational enterprises, indigenous peoples, poverty reduction, sustainable communities, HIV/AIDS 	<p>Share GDP: 1-11 per cent in 40 developing countries with a significant mining sector. In one country it is over 30 per cent</p> <p>In most industrialized countries, a modest (around 1 per cent) contribution. Export of minerals is often the main source of foreign exchange for developing countries, often exceeding 50 per cent</p> <p>Employment: Mining accounts for less than 0.5 per cent of the global workforce</p> <p>Total workforce: About 11 million. Over 3 million formal sector jobs lost in 1995-2000</p> <p>Up to 13 million people engaged in artisanal/small-scale mining (ASM). But over 200 million depend on all forms of mining for their livelihood</p> <p>Gender: Formal mining industry male dominated</p> <p>Proportion of women workers typically below 10 per cent, with little change in the last ten years. In ASM, however, the proportion of women workers is much higher, sometimes over half</p> <p>Organization: Mining unions traditionally very strong. The number of new mines that are not organized seems to be increasing. ASM is rarely organized at all, except sometimes as cooperatives</p> <p>Child labour: Widespread in ASM</p> <p>Safety and health: A dangerous industry accounting for 3-4 per cent of all fatal accidents at work (some 11,000 a year); a steady improvement over the last ten years. Other accidents and diseases are more difficult to measure, but they are at high levels compared with other industries. Deaths from diseases, particularly lung diseases, exceed workplace deaths in some countries</p>

Relevant ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Safety and Health in Mines Convention, 1995 (No. 176) (20 ratifications) ■ Two codes of practice and a handbook cover safety and health in coal mines and large and small-surface mines respectively 	<ul style="list-style-type: none"> ■ Collective bargaining is strong, reflecting the high level of unionization ■ The global union federation is creating global networks of workers in different countries who work for the same MNE, and is developing framework agreements with MNEs 	<ul style="list-style-type: none"> ■ Employment, working time and training (2002)

Oil and gas production, oil refining

Global trends and issues

Structural change and consolidation have resulted in less than ten vertically integrated companies that dominate the world oil market. Contractors and service companies are also consolidating. At the same time, state-owned oil and gas companies have experienced privatization and deregulation, particularly in countries in transition. Oil and gas extraction often takes place in harsh, remote or environmentally sensitive areas where it is difficult to work and live.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Structural change, mergers and acquisitions ■ Maintenance of collective agreements after restructuring ■ Worker protection ■ Health and safety ■ Contract workers 	<p>Countries of importance: About 60 major oil and gas producing countries in all regions</p> <p>Share of GDP: In Canada, the oil and gas sector represents about 2.2 per cent of GDP. In the United Kingdom oil and gas extraction accounted for 1.7 per cent of GDP</p> <p>Employment: Oil and gas extraction and production employed about 2.5 million in 1999. More than 1.3 million people were employed in petroleum refining in 2001</p> <p>Gender: Less than 10 per cent of the workforce is female</p> <p>Organization: Relatively high in refining; low in production</p> <p>Safety and health: About 180 deaths and about 450 accidents per year on mobile offshore units and fixed offshore oil and gas installations in 1990-97</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Chemicals Convention, 1990 (No. 170) (11 ratifications) ■ Prevention of Major Industrial Accidents Convention, 1993 (No. 174) (8) 	<ul style="list-style-type: none"> ■ Decline in trade union membership ■ Framework agreement signed between STATOIL and ICEM (1998) ■ Governments of the United States and the United Kingdom adopted voluntary principles on security and human rights in the oil, gas and mining industries (2000) ■ Most oil and gas MNEs have adopted codes of conduct 	<ul style="list-style-type: none"> ■ Promoting good industrial relations in oil and gas and oil refining (2002)

Postal and other communications services

Global trends and issues

Current trends indicate a relatively steady decline in employment in the postal sector over the next ten years. Substantial fluctuation is expected in employment in telecom in response to cyclical changes relating to market conditions, technology and new services.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Impact of ICT ■ Privatization, deregulation, liberalization ■ Increased use of short-term, precarious or casual employment ■ Outsourcing ■ Low level of social dialogue in telecom ■ Weak trade union organization in telecom ■ Violence and stress – postal workers, call centre workers ■ Lifelong learning 	<p>Countries of importance: Leading countries in various subsectors include Australia, Brazil, Canada, China, Egypt, France, Germany, India, Japan, Netherlands, South Africa, United Kingdom and United States</p> <p>Share of GDP: The revenues of telecommunications services at the global level were around \$1,210 billion in 2000, equivalent to 3.9 per cent of the world's GDP</p> <p>Employment:</p> <p><i>Postal services:</i> Total workforce about 5.25 million (2002) – 20 per cent part-time (estimate); estimate of 6 million overall (including private and informal services, and part of courier services)</p> <p><i>Telecom services:</i> Total workforce about 6 million, 20 per cent women</p> <p>Gender: Women make up about 30 per cent of the workforce, but few are in decision-making positions</p> <p>Organization: About 4.5 million affiliated to two global union federations</p> <p>Child labour: Informal sector postal services believed to use child labour</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ No sectoral standards 	<ul style="list-style-type: none"> ■ Prevalence of collective bargaining institutions and mechanisms ■ General weakening of collective bargaining and of collective agreements worldwide in the past 10-15 years, with process of separation of post and telecom services, privatization of the latter and liberalization of the former 	<ul style="list-style-type: none"> ■ ILO/UPU/UNI regional seminar on social dialogue in the postal industry in Latin America, in cooperation with UNI-Postal (Peru, 2003) ■ Employment, employability and equal opportunities in the postal and telecommunications services (2002)

Public service

Global trends and issues

Public services are under growing pressure to reform and improve efficiency and effectiveness as most governments are forced to reduce public deficits. Reforms, including competition, and the reduction of the role of the State in public services, have been implemented. These have led to decentralization, privatization and out-sourcing of services, resulting in declining employment and reduced employment security in the sector.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Effects of structural adjustment. Mixed results in many countries ■ Human resource management to keep up with changing technology and work environment ■ Training and retraining ■ Social dialogue ■ Managing market-oriented approach 	<p><i>Countries of importance:</i> Linked to population</p> <p><i>Employment:</i> About 260 million people in public administration</p> <p><i>Percentage of total workforce:</i> Varies. Up to 60 per cent in some countries</p> <p><i>Gender:</i> Women account for a higher proportion of the workforce in public services than in total employment. In industrialized and transition economies women make up about 54 per cent of the public services' workforce. In developing countries, their share is about 43 per cent. However, they tend to occupy low-skilled and low-paid positions</p> <p><i>Organization:</i> Public service workers are generally more highly organized than workers in other sectors. Between 20 and 85 per cent of workers in a range of countries are organized</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Labour Relations (Public Service) Convention, 1978 (No. 151) (42 ratifications) 	<ul style="list-style-type: none"> ■ In several countries collective bargaining institutions and mechanisms in the public service are well established and functioning ■ A large number of ILO member States impose restrictions on the right to social dialogue in the public service. In many cases, workers' freedom of association, right to strike and bargain collectively are restricted 	<ul style="list-style-type: none"> ■ Impact of decentralization and privatization on municipal services (2001) ■ Social dialogue in public emergency services in a changing environment (2003)

Shipping, ports, fishing, inland waterways

Shipping

Global trends and issues

As a globalized activity, shipping offers conditions of employment that depend on the market. Working and living conditions, as well as safety and health on board, have to be regulated at the international level, to ensure a level playing field. The specificity of shipping is such that the control of the implementation of international instruments by member States that have ratified them cannot only be performed through the usual reporting systems. This is why port state control (PSC) structures have been developed, and why modern instruments have to be easily applicable and controllable through PSC operations.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Protection of seafarers. All aspects of conditions of work and life, including abandonment and piracy ■ Respect for basic conditions of employment and conditions of work on board ■ Enforcement of all relevant minimum standards 	<p>Share of GDP: Varies from country to country; usually small. For some flag of convenience countries, may account for a significant share</p> <p>Employment: Total workforce about 1.2 million seafarers. In so-called traditional maritime countries, stabilization after years of decline. Countries with larger fleets (except Greece) are not, by far, the largest employers of national seafarers. Most maritime manpower is provided by a relatively limited number of nations, such as India, the Philippines and Turkey, and countries from the former CIS</p> <p>Gender: There has been a steady increase in the number of women employed. The overwhelming majority are employed on passenger ships, mainly in hotel and catering departments. Few women in higher positions</p> <p>Organization: Traditionally, strong maritime unions, but their numbers have dwindled with the disappearance of national seafarers. A well organized profession. About 650,000 affiliated to the International Transport Workers' Federation</p> <p>Child labour: Only seen in unorganized coastal shipping in some parts of the world</p> <p>Safety and health: A major corpus of regulations in this respect. They are largely implemented and well controlled. In spite of this, shipping is still a dangerous activity</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Maritime labour standards will be consolidated in 2004-05 	<ul style="list-style-type: none"> ■ Collective bargaining and social dialogue at national level widespread in many maritime countries. However, frequently non-existent with regard to open or international registries ■ International social dialogue very active 	<ul style="list-style-type: none"> ■ Several meetings of a high-level tripartite working group on maritime labour standards and of its sub-committee to prepare for the Preparatory Technical Maritime Conference (2004) and the Maritime Session of the International Labour Conference (2005)

Fishing

Global trends and issues

About 45 per cent of the total fish catch is taken by small-scale fisheries and the remainder from industrial fisheries. Marine capture fisheries had an estimated first sale value of \$76 billion in 1999. Overcapacity is a major issue in the global fishing sector and efforts to reduce it have a direct impact on employment. Because of the dependence of many coastal communities on fishing for food, income and employment, the depletion of fish stocks will have a very serious impact on them. The Food and Agriculture Organization (FAO) and the International Maritime Organization (IMO) have leading roles in efforts to improve fisheries management, safety of fishing vessels and training of fishers. The ILO is working closely with FAO, IMO and others on all aspects of conditions of work in fisheries.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Extent of small-scale and artisanal fishing. Special problems may require special measures ■ Work on vessels registered in states other than the fisher's state of nationality or domicile ■ Safety and health ■ Many fishers live on board vessels for extended periods of time ■ Employment – employment relationship, seasonal work, reduced capacity ■ Lack of social dialogue ■ Exclusion from laws and regulations protecting other workers 	<p>Countries of importance: The top ten marine and inland fisheries producers in 2000: China, Chile, Japan, India, Indonesia, Norway, Peru, Russian Federation, Thailand and United States. Many developing countries have significant populations of fishers (China, Senegal and Viet Nam)</p> <p>Employment: Over 15 million full-time fishers. About 21 million on a part-time or occasional basis. Vast majority employed in small-scale and artisanal fisheries. About 90 per cent work on small vessels</p> <p>Gender: Vast majority of fishers are male. Women, particularly in developing countries, have a major role in the processing and selling of fish products</p> <p>Organization: Among the least unionized sectors in many countries</p> <p>Child labour: Prevalent in many countries.</p> <p>Safety and health: The fatality rate in fishing is among the highest of any occupation</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Five Conventions and two Recommendations for the fishing sector addressing minimum age, medical examination, articles of agreement, accommodation, competency certificates, hours of work and vocational training. These will be consolidated into a comprehensive fishing standard in 2004 and 2005 ■ Certain standards for seafarers are also applicable 	<ul style="list-style-type: none"> ■ Limited social dialogue in many countries. Relatively few are members of trade unions. Urgent need to improve social dialogue in this sector 	<ul style="list-style-type: none"> ■ Labour standards for the fishing sector (2003) ■ Joint FAO/ILO/IMO meeting to develop codes on safety and health

Ports

Global trends and issues

Institutional changes in the port sector increased private sector participation in port development, management and operations. Some have led to job losses, but others to new jobs, most of which involved improved performance mainly through increased productivity. Failures were largely due to a lack of preparation before restructuring. The proposed EU directive on market access to port services, which under certain circumstances would allow self-handling of cargo in ports by crew members, aroused protest. Security measures in ports are an issue which requires close collaboration between the social partners and all other stakeholders in the port industry at the global level.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Structural adjustment and privatization ■ Training and retraining ■ Security, safety and health in ports ■ Environmental protection ■ Ports and the transport chain 	<p>Countries of importance: All countries with ports, particularly: Australia, Belgium, Brazil, Canada, China, France, Germany, Italy, Japan, Republic of Korea, Malaysia, Netherlands, Russian Federation, Spain, United Arab Emirates, United Kingdom and United States</p> <p>Employment: Estimated 2.5 million engaged in cargo handling operations. Related employment about 5.5 million. Employment shrinking due to technological and other efficiency improvements</p> <p>Organization: Cargo-handling workers on ships, in terminals and warehouses and workers involved in mooring/berthing operations highly organized, usually at a much higher level than national averages (60 per cent to 100 per cent, depending on the country and port). Unionization levels for workers employed by other service providers and in some cases office workers are usually below the national average</p> <p>Gender: Women workers account for less than 2 per cent of the cargo handling workforce. The overall proportion of women workers in ports is estimated to be around 13 per cent, mostly in office work</p> <p>Safety and health: Sophisticated cargo handling equipment and methods have eliminated a large proportion of manual work in ports with significant improvements for safety and health. Statistics not available</p>

Relevant ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Dock Work Convention, 1973 (No. 137) (23 ratifications) ■ Occupational Safety and Health (Dock Work) Convention, 1979 (No. 152) (20) ■ Marking of Weight (Packages Transported by Vessels) Convention, 1929 (No. 27) (65) ■ Code of practice on security in ports (2004) ■ Code of practice on safety and health in ports (2004) 	<ul style="list-style-type: none"> ■ Generally in connection with salaries/wages and working conditions, but less so for other issues, such as port reforms and privatizations. There is a need for capacity building for social dialogue, particularly in developing countries and countries in transition 	<ul style="list-style-type: none"> ■ Security, safety and health in ports (2003)

Textiles, clothing, leather, footwear

Global trends and issues

These sectors are among the most globalized industries. As a result, the distribution of production, trade and employment has changed dramatically. Asia dominates world textile production, followed by the Americas and Europe. Europe remains the world's largest producer of footwear, but Asia's share in the world total has been expanding regularly. Western Europe remains the largest exporter of textiles, but Asia has become the world's largest exporter of clothing (44 per cent of the total in 2000). China is the largest exporter of textiles and clothing in the world and the main employer in the textiles, clothing and footwear (TCF) industries.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Phasing out of the Multifibre Arrangement (MFA) by end of 2004 will affect the most vulnerable countries that depend heavily on quotas ■ Growing importance of developing countries as suppliers to world markets ■ Niche markets/high value added in some industrialized countries – viable despite competition ■ Flexibility in employment ■ Subcontracting ■ Social responsibility as a new criterion of competitiveness ■ Trade union rights in EPZs ■ Strengthening social dialogue in developing and transition countries ■ High proportion of unskilled jobs ■ High proportion of women, migrants and homeworkers ■ Child labour ■ Forced labour and debt bondage in some countries 	<p><i>Employment:</i> Stable with approximately 30 million jobs in the formal sector</p> <p><i>Child labour:</i> Many children continue to work in the TCF industries, particularly under subcontracting arrangements in the informal sector and with homeworkers</p> <p><i>Gender:</i> High proportion of women workers. Women are increasingly taking up supervisory and managerial posts at all levels</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<p>No sector-specific standards</p>	<ul style="list-style-type: none"> <li data-bbox="598 226 986 383">■ In developed countries, appropriate frameworks guarantee implementation of fundamental human rights at work. Social dialogue functions, but social partners weakened by increased international competition <li data-bbox="598 405 986 562">■ Restructuring policies in Central and Eastern Europe have enabled them to take part in globalization but have negatively affected trade union structures and collective bargaining practices <li data-bbox="598 584 986 663">■ Absence of representative employers' associations a major obstacle in many developing countries <li data-bbox="598 685 986 763">■ Legal or practical obstacles to the exercise of trade union rights, especially in export processing zones <li data-bbox="598 786 986 976">■ In some developing countries, genuine social dialogue has been established and collective bargaining functions. However, international competition exerts constant pressure on the social partners, limiting potential for any significant progress <li data-bbox="598 999 986 1178">■ Globalization increases pressure for social responsibility. A proliferation of voluntary initiatives places this group of industries among the most advanced but also the most open to criticism in the area of social accountability 	<ul style="list-style-type: none"> <li data-bbox="1013 226 1391 304">■ Labour practices in the footwear, leather, textiles and clothing industries (2000)

Transport (including civil aviation, railways, road transport)

Civil aviation

Global trends and issues

The importance of civil aviation to the global economy cannot be overemphasized. Every \$100 of output and every 100 jobs generated by air transport trigger additional demand of about \$325 and 610 jobs in other industries. The sector accounts for more than 4.5 per cent of world economic output. Additional security costs and a highly competitive environment are putting pressure on profits. The civil aviation industry is highly concentrated. Four airline alliances hold 60 per cent of the world market, two airline caterers 60 per cent of the world market, two ground handlers almost all EU the ground handling operations. Three tour operators hold 60 per cent of the EU market.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Restructuring. Considerable impact on employment, social practices and aviation safety ■ Violence and stress ■ Safety, health and security. Noise, all weather conditions, heavy machinery, check-in counters not in line with ergonomic principles, poor air quality in aircraft ■ Training, especially for workers in developing countries in the field of air traffic management ■ HIV/AIDS ■ Gender discrimination 	<p>Countries of importance: The United States (about 40 per cent of worldwide civil aviation activity), Australia, China, Ethiopia, France, Germany, India, Japan, Kenya, Republic of Korea, Netherlands, Russian Federation, Singapore, South Africa and United Kingdom</p> <p>Total workforce: Estimated 2.3 million workers work with air carriers, and other commercial operators and their affiliates. Further direct employment at airports and air navigation services accounts for another 1.9 million jobs</p> <p>Organization: Industrialized countries over 60 per cent. Less in others but always higher than the national average</p> <p>Gender: Women make up about 52 per cent of the workforce</p> <p>Child labour: Not known to exist</p> <p>Safety and health: Incidence of work-related illnesses (such as musculoskeletal injuries) relatively high. SARS was a major health threat during 2003. Aviation medicine constantly being addressed. An ICAO universal safety oversight audit programme (1999) audited aviation administrations in contracting states to identify safety deficiencies</p> <p>Security: During 2001, 21 acts of unlawful interference were recorded</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Code of practice on workplace violence in services sectors and measures to combat this phenomenon (2004) 	<ul style="list-style-type: none"> ■ More active in times of crisis, when there is a need for concessions ■ Weak social dialogue on issues such as safety and health, security, new technologies and systems of work, training, structural adjustments 	<ul style="list-style-type: none"> ■ The social and employment consequences of restructuring after 11 September 2001 (Costa Rica, 2003) ■ Civil aviation: Social and safety consequences of the crisis subsequent to 11 September 2001 (2002)

Rail transport

Global trends and issues

Over the last two decades, governments have sought to privatize railways. New private operating structures, such as commercialization and contracting out, and public-private partnerships, have led to significant job losses and sometimes safety cutbacks. The rail industry is still undergoing huge changes. Different models of change have been promoted in different regions of the world. The World Bank is highly influential in the restructuring of publicly-owned railways in Africa, Asia, Central and Eastern Europe and Latin America, tending to push for the leasing of railways and infrastructure to private interests. An important consequence of the fragmentation and privatization of many formerly publicly-owned networks has been the establishment of a growing number of multinational rail operators.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Safety and health ■ Violence ■ Gender: Occupational segregation. Harassment, shift work, long-distance travel and the dangers of working alone ■ Privatization and employment 	<p>Countries of importance (employment): France: 180,000; Germany: 200,000; India: 1.5 million; Russian Federation: 1.2 million; United States: 180,000</p> <p>Employment: Significant decline of about 20 per cent between 1990-99. Railway employment (without railway supply industry) was around 7 million in 1999</p> <p>Organization: Union density remains very high in the sector even after major rail restructuring worldwide. Exceptions, e.g. Mexico</p> <p>Gender: The proportion of women workers is estimated to be about 28 per cent</p> <p>Safety and health: Low accident risk in comparison with other modes of transportation, especially road. In EU about 0.72 fatalities (passengers and staff) per billion km</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Code of practice on workplace violence in services sectors and measures to combat this phenomenon (2004) 	<ul style="list-style-type: none"> ■ In Europe, permanent social dialogue functions through EU social dialogue structures ■ Social dialogue on safety issues and on the restructuring of publicly-owned railways should be further encouraged 	

Road transport

Global trends and issues

Like most transport sectors, road transport has undergone huge changes in recent years as globalization has opened up new markets for multinational companies and the industry has become deregulated. There has been an impact on employment, working conditions and industrial relations. Deregulation in road haulage has increased competition which has sometimes led to reduced wages and conditions for drivers, as well as increased hours of work.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Relocation and freedom of association ■ Employment relationship. Companies encourage workers to become self-employed to reduce their own costs ■ Violence and sexual harassment in passenger transport ■ Safety and health ■ Conditions of work and rest ■ HIV/AIDS ■ Protection of international drivers at border crossings ■ Under-representation of women in both passenger and goods transport 	<p>Countries of importance: Argentina, Brazil, Canada, European Union countries, Russian Federation, South Asia and United States</p> <p>Employment: No clear criteria for road transport employees. Over 1.3 million owner-drivers in the European Union. Increasing in transport logistics</p> <p>Organization: 191 road haulage, bus and taxi workers' unions represent 1.5 million members. As a general trend, bus workers are better organized than road haulage and taxi workers</p> <p>Gender: Women account for about 22 per cent of the workforce</p> <p>Safety and health: Worldwide over 700,000 killed and over 10 million injured in road accidents, costing the global economy about \$500 billion each year. In developing and transition countries, road accident rates tend to be 20 to 30 times higher than in industrialized countries and cost up to 2 per cent of GDP</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Hours of Work and Rest Periods (Road Transport) Convention, 1979 (No. 153) (7 ratifications) 	<ul style="list-style-type: none"> ■ Increased labour flexibility requires more diversified bargaining ■ Deregulation and liberalization can affect working conditions, including hours of work, driving time, rest periods, and health and safety ■ Increased road traffic across borders in economically integrated regions gives rise to a new set of issues: licensing, cabotage, legal and social protection of workers abroad; standards on working conditions and health and safety; and efforts to harmonize national laws and practices related to those issues. Thus importance of new institutional arrangements for labour-management consultation and social dialogue beyond the national level 	

Transport equipment manufacturing

Global trends and issues

Six companies in Western European, North America, Japan, the Republic of Korea, China and Brazil manufacture over 80 per cent of the cars in the world. The workforce is generally highly unionized and among the best paid. Increasingly, however, the big automotive companies are becoming final assemblers and marketers of vehicles only, relying heavily on suppliers to provide complete modules as well as components. In the manufacture of aircraft, the trend continues towards consolidation into two major producers, in the United States and in Europe. Shipbuilding continues to be centred in the Republic of Korea and Japan, while China has embarked on the construction of the largest shipbuilding yard in the world. Ship scrapping remains concentrated in Bangladesh, China, India, Pakistan and Turkey. The recent decision to phase out single-hull vessels will not only increase pressure on ship scrappers, it will also stimulate demand for the construction of new double-hulled ships.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Social dialogue. Although workers in parent companies and first-tier suppliers are highly unionized in industrialized countries, the situation is less clear with respect to second- and third-tier suppliers and subsidiaries in developing countries ■ Employment. The effects of relocation ■ Safety and health. The shipbuilding, ship repair and ship scrapping industry remains one of the most dangerous in the world, and will increasingly be located in Asia 	<p><i>Importance of sector:</i> Fifteen of the top 100 MNEs are automobile companies or suppliers of automotive parts</p> <p><i>Exports:</i> Automobiles and automotive parts account for about 10 per cent of the world's merchandise exports. Machinery and "other" transport equipment for another 17 per cent. (Together with office and telecom equipment, these three "metal trades" account for 40 per cent of world exports.)</p> <p><i>Employment:</i> 7.5-10 million</p> <p><i>Gender:</i> Although negligible in developing countries, women comprise 15-20 per cent of the workforce in the metal trades in the industrialized countries</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ Code of practice on shipbuilding and ship repairing (1974) ■ Safety and health in shipbreaking: Guidelines for Asia and Turkey (2004) 	<ul style="list-style-type: none"> ■ In the United States, the big three automobile companies have recently signed four-year collective agreements ■ The global union federation (IMF) has signed international framework agreements with Volkswagen and DaimlerChrysler that call for respect for ILO core Conventions and encourage the companies to deal only with unionized suppliers 	<ul style="list-style-type: none"> ■ Social and labour impact of globalization in the manufacture of transport equipment (2000)

Utilities (water, gas, electricity)

Global trends and issues

Technological developments can improve the quality and quantity of services and lead to better working conditions, for instance by reducing some physically strenuous tasks and offering opportunities to women. Their effective introduction requires careful planning and joint consultation, in view of the potential impact on jobs, conditions of employment, work organization and training needs.

Main issues for the ILO	Specific data
<ul style="list-style-type: none"> ■ Serious shortages of skilled personnel (mostly in developing countries) ■ Restructuring and privatization ■ Outsourcing ■ Employment. Introducing market concepts, concerns and work methods in public firms. Commercialization versus public service ■ Globalization. Utility firms are becoming transnational 	<p><i>Countries of importance (in terms of employment):</i> China, Egypt, France, Germany, Japan, Poland, Romania, Turkey, United Kingdom and United States, etc.</p> <p><i>Share of GDP:</i> Not available</p> <p><i>Employment:</i> About 8.7 million in 56 countries. 1.6 per cent of the total workforce</p> <p><i>Gender:</i> Women account for about 23 per cent of the workforce</p> <p><i>Safety and health:</i> 350 fatalities and 49,500 other accidents in 55 countries</p>

ILO instruments	Social dialogue	Recent sectoral meetings
<ul style="list-style-type: none"> ■ No sectoral standards 	<ul style="list-style-type: none"> ■ Some global framework agreements, e.g. between Endesa, a Spanish power company, and ICEM (International Federation of Chemical, Energy, Mine and General Workers' Union); and between Eni, an Italian energy company, and ICEM ■ Social dialogue mechanism well established, functioning relatively well in some parts of the sector. In others deficient or absent. There is a need for capacity building for social dialogue among tripartite constituents, particularly in developing countries and countries in transition 	<ul style="list-style-type: none"> ■ The challenges and opportunities facing public utilities (electricity, gas and water) (2003)