

**BUILDING A  
RECOVERY  
FOR ALL**



A STRONG VOICE FOR INDUSTRIAL WORKERS IN EUROPE

# **REPORT OF ACTIVITIES 2016-2020**



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# **Introduction**

## Stronger By Being United

The second mandate period of industriAll Europe began in June 2016, with our Congress in Madrid. It was the start of an intense period in which we developed activities in line with our action plan in four priority areas: collective bargaining, industrial policy, company policy and building trade union power.

The transformation of our industries, driven by decarbonisation, the energy transition and digitalisation, combined with our demands for a trade policy that guarantees a level playing field for European industries, were key drivers for numerous activities, campaigns and positions in the field of industrial policy.

To shape these transformations and secure the interests of workers in industries undergoing transition, we need good social dialogue and strong collective bargaining. That was the central demand and purpose of our 'Together at Work' campaign. This campaign was an impressive success, and it came at the right moment, because collective bargaining is a prerequisite to master the changes and secure fair transformations for workers.

Within the field of company policy, we continued to work on strengthening workers' involvement at the company level. Reinforcing European Works Councils, effective consultation rights and stronger coordination in restructuring were just a few of our focal points.

Building trade union power was a new priority for industriAll Europe. A unit was set up to coordinate our actions in this field and provide support for member organisations wishing to set up recruitment and organising campaigns. Initiatives to strengthen trade unions' membership bases were also taken at sectoral level, with an emphasis on (but not limited to) Central and Eastern Europe.

During this period, industriAll Europe also expanded its sectoral work, as well as the work with youth, equal opportunities and the growing group of white-collar workers in our membership. Our work was supported by various projects and was used as input for the 11 European Sectoral Social Dialogue Committees in which industriAll Europe participates.

We can be positive about the results of our work since the last Congress in 2016. They are the fruits of our collective work: a collective effort of all our member organisations and the staff of industriAll Europe. This UNITY - the key to our collective success - was one of the main messages of our 2016 Congress. Looking back, we can conclude that the past mandate period was mainly, but not always, characterised by a lot of consensus - consensus where larger and smaller unions felt equally heard and involved, in a spirit and culture of dialogue, solidarity and respect. We must certainly continue this path.

The Congress, initially planned to take place in 2020, had to be postponed because of the COVID-19 pandemic. This pandemic has affected many workers and posed great challenges to many unions. IndustriAll Europe has, throughout the pandemic, tried to create unity and added value for our member organisations. This activity report also gives an overview of the activities that we have developed since and in response to the COVID-19 outbreak.

In 2020, a change in political leadership took place within industriAll Europe. The two Deputy General Secretaries, Luis Colunga and Benoît Gérits, elected in 2016, left the organisation at the end of their mandate. Deputy General Secretary, Sylvain Lefebvre, had already left the organisation, as agreed, at the end of 2018. At its meeting on 1 July 2020, industriAll Europe's Executive Committee decided to appoint two new Deputy General Secretaries: Isabelle Barthès and Judith Kirton-Darling. Both took up their political assignments immediately.

2016-2021 was a very intense period. Without the outstanding contribution of all our staff members, we could not have achieved these results. We expressly thank them for that because their commitment has been extraordinary.

Finally, on behalf of all our staff members, I would like to thank every member organisation, every trade union activist or official, for their active contribution to our activities. We may act at different levels (company, regional, national or European), have different backgrounds and industrial relations cultures, but we are all working towards the same goal: defending and strengthening the rights and conditions of our members and of all workers in industry. And to achieve this, unity, consensus and solidarity between all of us will continue to be crucial!




**Luc Triangle**  
General Secretary

The background of the page features a dark blue field with horizontal lines. Overlaid on this are large, flowing, curved shapes in shades of red and purple, creating a dynamic, abstract design.

## Disclaimer:

The following activity report covers the period June 2016 until December 2019 (deadline for submission of the individual reports). The most important activities after the reporting deadline and during the extended mandate period due to the Covid-19 pandemic are covered in a separate chapter at the beginning of the report.

## 2020 – A Year That Changed Our Lives and Our Work

By the end of the last reporting period, industriAll Europe was immersed in the preparation for its third Congress due to take place in May 2020, in Thessaloniki (Greece). The day-to-day work of the secretariat and committees was focused on dealing with the major transformations (both green and digital) underway in our industries, strengthening collective bargaining, and working for better workers' participation and stronger trade unions. The year started apace with the publication of the European Green Deal and social partner consultation on a potential European Minimum Wage – two of the central priorities of the new European Commission. Alongside political developments, there were also successful initiatives on Building Trade Union Power (BTUP), including the co-organisation of a major conference in Berlin together with UNI-Europa and IG Metall.

However, during February 2020 it became clear that a global pandemic was spreading, and that Europe was not going to be spared from its path – already at this point, northern Italy was extremely hard hit. But in the second week of March 2020, just 8 days after the publication of a much-anticipated new European industrial strategy, the pandemic's spread forced lockdown measures in many European countries. Life changed – perhaps forever.

As the pandemic deepened, it became clear that planning for a Congress in May 2020 would have to be halted and it was agreed that the Congress period would be extended until June 2021. This summary aims to cover all the major activities of industriAll Europe in 2020 to update the existing Report on Activities prepared for the cancelled 2020 Congress.

The pandemic and lockdowns resulted in a rapid transformation in the way that industriAll Europe, our staff and our movement could work and organise ourselves. But it also created a hiatus in which physical meetings were cancelled and different technological solutions for virtual meetings were explored. From April onwards, meetings were held entirely on-line, both internally and externally. Over the last year, this has meant that in practice there has been more opportunity to meet each other, a higher frequency of policy, sector, working group and BTUP task force meetings, with more interpretation used and the opportunities for more participation (especially from those in which cost or time constraints have previously limited participation). Furthermore, industriAll Europe's occupational health and safety network has transformed from an email list of interested members to an active working group and has played a key role in coordinating specific COVID-19 related OSH concerns.

The main focus of the secretariat throughout has been to create added-value and support for affiliates in this unprecedented crisis. To ensure this end, the elected team undertook a series of regional meetings with union leaders and Executive Committee members through September



and October. This was an innovation to replace physical meetings at national level and was seen as a useful means of exchanging information and getting a better understanding of the national situation across Europe and key EU debates.

Despite the speed of the arrival of the pandemic, industriAll Europe was able to launch a series of immediate actions in support of affiliates and members across Europe. Notably, the creation and launch of our 'COVID19 Monitor', which allowed the collection and sharing of national and sectoral measures and agreements between affiliates. This ensured best practices in managing the pandemic's impacts. Initially much focus was on health and safety at work, defining essential production, promoting income support schemes and job retention. Unfortunately, time was also spent defending workers' interests from some companies' attempts to use the crisis for restructuring announcements.

That said, from April, the first wave of COVID-19-related restructuring started largely in the major OEMs (both automotive and aerospace). This was followed through the summer by a second wave in the top tiers of suppliers. Furthermore, there have been significant coordination efforts of ad hoc trade union coordination groups as a result of announced restructuring, mergers and acquisitions (including, ArcelorMittal, General Electric, GFG Alliance, Alstom-Bombardier, Nokia ...), as well as cross-border industrial actions (e.g. at Alstom-Bombardier) and solidarity actions (with Nissan, Whirlpool, EDF and Hitachi ABB colleagues, amongst others). This has generated a major increase in the work inside industriAll Europe on trade union coordination at company level, and joint strategising.

Throughout 2020, industriAll Europe increased its support to trade union representatives in multinational companies. In addition to monitoring and advising EWC and SE (re-)negotiations, industriAll Europe continued to develop practical tools and resources, including a shared list



Alstom Bombardier Action Day 16 July 2020, Santa Perpètua Plant

of EWC/SE contact persons in affiliated trade union organisations, and additional publications in its series of recommendations for action on specific topics (digitalisation, Brexit - update).

Confronted with the major disruption brought about by the pandemic, publications in that series were extended to recommendations about the anticipation and management of the COVID-19 crisis in multinational companies, temporary arrangement for online EWC/SE meetings, as well as trade union coordination before and during transnational restructuring. Building upon the quality working relationship established over the past years, some of those recommendations were drafted jointly with other European trade union federations.

It is also together with the European trade union federations and the ETUC that industriAll Europe advocated for a better compliance and enforcement of information, consultation, participation and EWC rights through joint events, actions (including an online petition and a week of mobilisation in November 2020), as well as statements addressed to the European Commission and Member States. The “More Democracy at Work” strategy will go on through 2021.

At sectoral level, it was apparent that pre-existing crises and transformations in some sectors were being intensified and accelerated (e.g. basic metals or automotive), while for others, COVID-19 created a crisis through the sudden rupture to the economy (e.g. aerospace, TCLF). A number of positions were adopted through written procedure to reflect this reality, including the Steel Action Plan (May 2020), a joint position with TCLF social partners on COVID-19 (July 2020), and joint Social Partner Guidelines on Safety in the Chemicals Sector (July 2020).

On 1 July 2020, the Executive Committee met virtually. At this occasion it was agreed that new Deputy General Secretaries would be appointed until the Congress in 2021, following the departure of Luis Colunga and Benoît Gérils. As a result, from the beginning of July, Isabelle Barthès and Judith Kirton-Darling joined the elected team. The Executive Committee also debated and adopted the route forwards for industriAll Europe until the new Congress date in 2021 – notably by adopting a workplan for July 2020-June 2021. Fundamentally, the Executive Committee offered the first opportunity to draw together all affiliated organisations and, as the minutes demonstrate, there was general support and appreciation of the speed and approach taken by industriAll Europe to deal with the crisis.

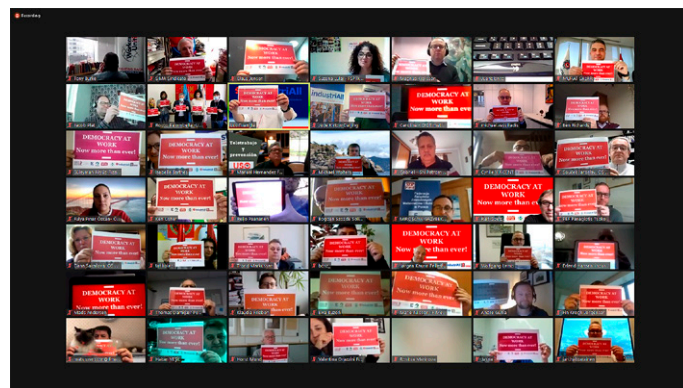
Furthermore, a comprehensive position statement on COVID-19 was adopted, which focused the reality for our members and the proposals from the Commission to tackle the crisis and support recovery. Concrete demands, including fighting for workers’ health, income and jobs, the fight for our industries and a united and determined Europe, are needed to retaliate, and these were set out and disseminated to policymakers at national and European levels.

This position drew on the expertise of all three policy committees and marked a shift in the internal work in industriAll Europe towards greater coordination and common endeavour

between policy and sectoral committees. A series of sectoral positions - mostly adopted through written procedure - have articulated specific union demands for recovery measures in the automotive (July 2020), aerospace (September 2020), shipbuilding and maritime equipment (November 2020), and non-ferrous metals (November 2020) sectors. These have complemented the earlier European Steel Action Plan and TCLF positions.

Within the EU, July also marked an historic occasion, as the European Council agreed to a substantial recovery package for Europe: the so-called 'NextGeneration EU'. As a result, it was agreed that a common stimulus of €750bn would be combined with the next Multiannual Financial Framework 2021-27 (the EU budget), to create a financial firepower of €1.8 trillion to steer the EU out of the COVID-19-generated economic crisis. IndustriAll Europe was active in campaigning for this recovery package, alongside the ETUC, and has been active in influencing its adoption in the European Parliament. This is also being done through joint initiatives with affiliates at the national level, aiming to ensure that the recovery funds generate an industrial recovery, support fairness in the dual transitions, underpin cohesion within and between countries, and secure jobs as a primary objective. Numerous meetings with Commissioners and their staff, MEPs and their staff, and the EU Presidency have taken place to advocate for our members' interests.

Following the summer, the high frequency of virtual meetings of the three policy committees, sectors, the BTUP taskforce and horizontal workgroups has continued. The Executive Committee on 24-25 November took stock and considered the results of this work, and notably adopted an updated position on COVID-19, the EU recovery plan and the flanking measures needed to ensure equality and action for young people. Positions on the European Green Deal and proposed increases to EU climate targets, the new EU offshore renewable energy and hydrogen strategies, as well as consultation response to a Carbon Border Adjustment Mechanism, were adopted and noted.



Executive Committee, November 2020

It was also an opportunity to address the proposed European Minimum Wage, following a second-stage social partner consultation and the publication of draft legislation. Here the Collective Bargaining and Social Policy Committee has undertaken extensive work on the proposals in concert with the ETUC. The Executive Committee adopted a new position on digitalisation and telework – reflecting the need for better regulation of the 'new normal' for many workers.

In response to the huge threat posed by the COVID-19 crisis to trade union organisation, the Executive Committee adopted a specific Building Trade Union Power Activity Plan 2021 -2022 'Strong unions with strong collective bargaining for the recovery of strong industries' with the aim of supporting affiliates in the collective campaign for stronger trade union power and collective bargaining.

Finally, the development of new EU initiatives on education and training were presented and discussed – notably the Pact for Skills, launched by the Commission in November, and sectoral initiatives on skills in the automotive, aerospace, shipbuilding and textile sectors, with employers and other training actors.

Sector	Key developments 2020
<b>Aerospace</b>	<ul style="list-style-type: none"> <li>• Aerospace Paper: "Flying into Recovery" adopted and ongoing meetings with MEPs, the Commission and companies.</li> <li>• Signature to the Aviation Round Table Report: calling for a targeted European Aviation Relief Programme and a EU Pact for Sustainable Aviation.</li> <li>• Decarbonisation of the sector and the impact on workers (awaiting the Commission's Aviation Strategy Q1 2021).</li> <li>• Support for Pact for Skills in aerospace and defence sector.</li> </ul>
<b>Automotive</b>	<ul style="list-style-type: none"> <li>• Statement 'For a recovery of the European automotive sector and its workers' (July 2020): follow-up meetings with DG Grow, MEPs and other stakeholders.</li> <li>• Meeting with TRAN and EMPL committee of the EP about the future of the automotive industry (output: letter sent by S&amp;D to the European Commission, requesting a 'strong framework for the Just Transition in the automotive and allied industries is urgently needed to manage the massive restructuring wave which is currently looming' (Sept 2020). Active participation to the EP process on the future of the automotive industry coordinated by TRAN Committee Chair Karima Delli (FR Greens).</li> <li>• Support to the 'Skills 4 Jobs initiative' (Proposal from ACEA, CLEPA and al. to use ALLBATTs and DRIVES projects as a basis for the Skills alliance). Participation in the 'Skills alliance for the automotive industry', officially launched on 10 November 2020 by the European Commission.</li> </ul>
<b>Basic Metals</b>	<ul style="list-style-type: none"> <li>• European Steel Action Plan: ongoing campaign (including European Steel Action Day 1 October).</li> <li>• Non-ferrous metals policy paper (in consultation): to highlight sector-specific challenges and raise trade union demands.</li> <li>• Steel safeguards: current measures to end in July 2021 and trade unions demand an investigation into continuing the measures.</li> </ul>

Sector	Key developments 2020
<b>Chemicals &amp; Basic Materials</b>	<ul style="list-style-type: none"> <li>Chemicals Strategy for Sustainability published in October.</li> <li>Decarbonisation of the chemical industry/ies.</li> <li>Follow-up topics of Social Partner digitalisation project: digitalisation and equality, digitalisation and health &amp; safety (chemical, pharmaceutical, plastics and rubber).</li> <li>Renovation Wave (glass, cement).</li> <li>Plastic tax, plastic recycling (targets), ban on single use plastics.</li> <li>Pulp and paper: Masterplan for industrial transformation and forest-based industries 2050 vision.</li> <li>Industrial strategy and ecosystems.</li> <li>Attractiveness of the sectors.</li> </ul>
<b>Defence</b>	<ul style="list-style-type: none"> <li>Ongoing DG EMPL-funded project 'EU defence policy: towards more industrial integration. How to anticipate change for workers?' kick-off meeting.</li> <li>Discussions in the sector network focused on the challenges of companies that have both, a civilian and a military branch. Defence budgets within the next MFF. Upcoming political discussion around the strategic compass, but also the first full-cycle CARD report will continue to shape the debates.</li> </ul>
<b>Energy</b>	<ul style="list-style-type: none"> <li>For all subsectors: the impact of COVID-19 on energy transition, companies and employees.</li> <li>Gas: Potential of renewable gas and hydrogen, Joint statement with Eurogas and EPSU on Just Transition, and joint project application on the energy transition and employment in the gas sector.</li> <li>Electricity: Framework of Actions on digitalisation, Skills2Power project and Just Transition Fund and good practices.</li> <li>Energy Network: EU Clean Hydrogen Strategy, Offshore Renewable Energy Strategy, Just Transition Fund and Territorial Plans and launch of Just Transition Platform, and full participation in EU High-Level Working Group on Energy Intensive Industries.</li> </ul>
<b>Extractive Industries</b>	<ul style="list-style-type: none"> <li>Raw Materials Action Plan (draft statement in SSDC).</li> <li>Health and safety standards in SMEs.</li> <li>Just Transition in coal regions: support for affiliates working on coal phase-out social plans.</li> </ul>



Sector	Key developments 2020
<b>ICT</b>	<ul style="list-style-type: none"> <li>• Repercussions of the ongoing pandemic on the sector: accelerated the digitalisation of the companies in the sector, telework is often set to become “the new normal” and some companies try to exploit the situation by reducing their spending on office infrastructure, etc.</li> <li>• Discussion on how workers can be compensated for WFH/increased expenditure for e.g. energy costs, high-speed internet connection, etc., but also how to prevent workers’ alienation from their colleagues and their workplace will become more urgent. As digitalisation is a key focus within the Recovery Plan, with 20% of the budget to be invested in digital, combined with 37% of the budget being earmarked for the Green Transition, the question will be how to make best use of the sector in Europe.</li> <li>• IndustriAll Europe has also contributed to the public consultation on the White Paper on Artificial Intelligence. The contribution based on the demands that were formulated in industriAll Europe’s Policy Brief ‘Artificial Intelligence: Humans must stay in command’.</li> </ul>
<b>Mechanical Engineering</b>	<ul style="list-style-type: none"> <li>• Resilience of supply chains and the dependence of the sector on other sectors, such as the automotive or the aerospace sector: payment defaults, delayed or not accepted orders, or services that were temporarily not required, such as maintenance or initial operation of elevators.</li> <li>• Investments in digital and green technologies, as well as in reducing the carbon footprint of machinery. European flagship programmes, such as the Green Deal or the Circular Economy, will pose major challenges to the industry and large-scale investments will be inevitable to stay competitive.</li> <li>• The sector network has also continued to discuss the ongoing revision of the Machinery Directive (2006/42/EC).</li> </ul>
<b>Pharmaceuticals</b>	<ul style="list-style-type: none"> <li>• Pharmaceutical Strategy for Europe: work for good jobs, good training, R&amp;I&amp;D and production in Europe.</li> <li>• iAE participated in high-level conferences on EU cancer action and pharmaceuticals.</li> <li>• iAE endorsed the EU pledge for pharmaceutical cooperation on COVID-19 vaccines.</li> </ul>
<b>Shipbuilding</b>	<ul style="list-style-type: none"> <li>• Recovery Paper (in consultation): sets out the key issues relating to industrial policy, trade, sustainability and social standards.</li> <li>• Skills: USWE project (Erasmus+) due to end in November 2020 and EU Pact for Skills identified as next step.</li> <li>• Trade and the need for fair competition: membership of OECD WP6 remains important.</li> </ul>
<b>TCLF</b>	<ul style="list-style-type: none"> <li>• Joint Social Partners’ statement on the impact of COVID-19.</li> <li>• EU files of importance: EU Textiles Strategy, due diligence and GSP revision.</li> <li>• EU funded SD project with COTANCE on social and environmental responsibility and submitted a project on capacity building in SE Europe.</li> </ul>

Alongside these activities, industriAll Europe has continued to play an active role in a series of EU projects, both independently and with employer partners. Notably, a new four-year project with the ITUC's Just Transition Centre was launched in 2020 on Just Transition and Decarbonisation, financed by the European Climate Foundation – with the organisation of roundtables on offshore renewable energy (hosted by Danish affiliates) and heavy industry in Central and Eastern Europe (hosted by Bulgarian affiliates). Alongside this project, industriAll Europe started the work on its own EU-funded Decarbonisation, Restructuring and Digitalisation projects.

After a first series of regional seminars on fair digital transformation for workers, industriAll Europe decided to extend the project with regional webinars in order to take stock of the impact of COVID-19 on the digital transformation of our sectors. In addition to supporting ad hoc trade union coordination on specific company cases, the EU-funded project 'Anticipate & Shape', launched in 2020, aims at updating the 2006 EMF handbook on transnational restructuring with a view to provide practical guidance and political advice to trade union representatives at company level. At the end of the year, the secretariat heard that project proposals on Building Trade Union Power in the TCLF sector in SE Europe and several social dialogue projects had been successful – setting out work for 2021.

2020 has been an extraordinary and unprecedented year for our societies and movement. At industriAll Europe, our primary objective throughout has been to stay closely connected with each other, building solidarity and unity, despite the fact that the pandemic hasn't impacted all countries at the same pace or to the same degree. As vaccines are developed and disseminated through 2021, trade unions will be instrumental in managing the social and economic aftermath of the pandemic. Again, this will not be uniform across countries or unions, and solidarity will be more necessary than ever.



Steelworkers' campaign gained support across Europe in 2020.



# **Policy Priorities**



# Industrial Policy

## Dealing with deep industrial transformation

Before the current coronavirus crisis, we saw the European economy grow. The economic upswing also created new jobs, some 12 million since 2013, with a positive impact on unemployment which dropped from 26 million in 2013 to 16 million in 2019. Public finances improved significantly, and investment finally started to recover. The unemployment rate fell from 12% to 7% - the lowest level in a decade. However, only in 2017 did industrial production in the manufacturing industry reach pre-crisis levels. The 1.6 million manufacturing jobs created between 2013 and 2017 are significantly lower than the 4.6 million jobs that industrial workers lost during the crisis.

Moreover, the financial crisis left deep scars that have yet to heal: 12.4 million people are still jobless (compared to 24 million at the height of the crisis, early in 2013), while many new jobs are temporary or part-time. Unemployment remains unacceptably high in the South of Europe. Underemployment (involuntary part-time work, discouraged workers no longer available for the labour market) exceeds the headline unemployment rate. The process of wage convergence between Western and Central Europe has come to a standstill. On top of this, a new informal economy is emerging, composed of a growing number of gig-workers working for internet platforms. Overall wage growth is subdued. Austerity policies have been



Luc Triangle at EU Industry Days 2019.

phased out, but they had a deep impact on countries such as Greece which saw its real GDP per capita decline by 20%.

Furthermore, it seems that after six years of recovery we are approaching the peak in the business cycle. The European economy has begun an economic downturn. At the same time there is almost no room for monetary policy action to address it as short-term interest rates are already negative.

The changed economic environment resulted in activities of the Industrial Policy Committee shifting away from fighting austerity and the neoliberal remedies to the crisis and towards developing proposals on how to use the more lenient macro-economic environment to sustain the economic recovery, increase industrial production, finance the low-carbon transition of industry and create quality jobs in manufacturing.

At the same time, the Industrial Policy Committee tried to identify the risks that could hamper future growth and to formulate answers to the many structural challenges our economies are facing. Most of the megatrends were already present at the time of the 2016 Congress in Madrid (globalisation, ageing population, digitalisation, a low-carbon economy, energy and climate change). However, their appearance has changed over the years and new risks and challenges for industry are emerging:

- The Paris Agreement was signed in 2017 and was followed by the profoundly disturbing report from the Intergovernmental Panel on Climate Change (published in October 2018). As a result, we saw a global proliferation of climate activism and the protection of our planet was put on top of the political agenda. In its new Climate Plan 2050 ('A Clean Planet for All') the EU launched the extremely ambitious objective of becoming carbon neutral by 2050. It will be particularly challenging for our transport system and for heavy industry;
- The UN Sustainable Development Goals were also approved in 2017 and offer a shared blueprint for sustainable development at the global level. The EU must face the challenge of integrating them in its decision-making processes;
- The concept of a circular economy has rapidly emerged;
- Growing concerns over the digitalisation of the economy and its impact on jobs. 'Industry 4.0' became a new buzz word. Artificial Intelligence (AI), the creation of an 'Internet of Things' and the roll-out of 5G have become important challenges for industrial policy;
- Emergence of a new informal economy (the 'gig'-economy based on digital platforms)
- The growing power of the 'digital giants';
- Lack of resilience on the EU's part to face future economic crises as it failed to deliver on the deepening of the Economic and Monetary Union, badly needed as the EU still combines a prosperous North with a far more fragile Southern periphery;
- Authoritarian populist parties are thriving, and their misleading narrative draws in ordinary people. It could lead to a destabilisation of our democracies.

- The rise of economic protectionism (America First!, Brexit) and looming trade wars, together with a deep crisis in the WTO, might mean the end of the multilateral, rules-based trade order.
- The growing impact of China on the global economy.

## Industrial policy

In view of the upcoming European elections in 2019, the Industrial Policy Committee elaborated a new Action Plan (June 2018) in the form of an update of the 2014 'Manifesto to put industry back to work'. The document, entitled 'Manufacturing our Future', was widely discussed in many workshops and conferences. It allowed us to present our views on industrial policy in a coherent and integrated way and provided the basis for discussions with important stakeholders. Indeed, together with the Consultative Commission on Industrial Change (CCMI), industriAll Europe was invited for the first time in its history to present its vision of the future of European industry to the European Council.

The Industrial Policy Committee (IPC) took stock of the European Commission's new Communication on industrial policy. The Committee regretted that the Commission did not propose a comprehensive strategy as called for by a Resolution of the European Parliament. Nevertheless, the Committee welcomed the ambitious list of actions to be taken by the current Commission before the end of its mandate.

IndustriAll Europe was very visible during the EU Industry Days organised by the Commission in 2017, 2018 and 2019. We were present in the opening panel and in several parallel sessions. IndustriAll Europe took the initiative to organise its own panel on the economic benefits of social dialogue (2018) and on the deep decarbonisation of energy-intensive industries (2019).

IndustriAll Europe has been an influential member of the High-Level Round Table Industry 2030, a small group of experts that developed a coherent vision, strategy and Action Plan on the long-term future of Europe's industrial activities (published in July 2019). The work of the High-Level Group constituted the basis of a new comprehensive industrial strategy for the EU, proposed by the Commission to the Council at the end of 2019. IndustriAll Europe took part in several debates and stakeholder consultations.

IndustriAll Europe contributed as (co)-rapporteur to a number of CCMI opinions including on maritime technology, steel, aerospace, automotive, industrial policy (three opinions in total), market economy status for China, digitalisation and employment, Industry 4.0, joint technology initiatives and public-private partnerships, the European Defence Fund, shipbreaking, the recycling society, Border Adjustment Mechanisms, and Artificial Intelligence.

Horizon 2020 is the main funding programme in the EU for research and innovation. Its positive track record has created momentum that should be maintained. IndustriAll Europe contributed

to the preparation of the upcoming 'Horizon Europe' programme (2021-2027) in four workshops organised by the European Commission. It will also be involved in the implementation of the programme, i.e. the development of the different missions, and cross-sectoral programmes related to key societal challenges.

IndustriAll Europe was represented in the Steering Committee of the 'Future of Manufacturing' project of the European Parliament, carried out by Eurofound. The project ran over four years with the following main subprojects: forecast of the future employment impact of new technologies, defining a re-shoring monitor, defining key jobs in manufacturing, assessing the impact of game-changing technologies and developing regional industrial capacity. The Industrial Policy Committee has had several exchanges with the research team to discuss their findings.

IndustriAll Europe was selected as a member of the Rail Supply Expert Group. The initiative follows a Resolution of the European Parliament calling for an industrial policy for this important subsector. IndustriAll Europe developed an Action Plan for the sector which was presented to the Expert Group. The Action Plan was presented in November 2019 and contains over 80 recommendations related to topics such as digitalisation, public procurement, standards, access to markets, unfair trade practices, protection of intellectual property rights, and skills.

As public procurement represents 17% of GDP, the Industrial Policy Committee decided to work on a position paper on how to better use public procurement as a tool for industrial policy.

The failed merger between Siemens and Alstom led to increased calls for a review of Europe's competition policy and for a new debate on how to establish 'European Champions'.

The lack of preparedness of companies for the challenges of digitalisation was discussed based on IG Metall's 'Transformationsatlas'.

## **Sustainable development**

Decarbonising our economies is probably the most important challenge of our time. To raise awareness regarding these challenges, the Commission created a High-Level Group for the deep decarbonisation of the energy-intensive industries in order to coordinate efforts. Energy-intensive sectors are asked to develop their own roadmaps. IndustriAll Europe presented its own view to the High-Level Group and signed, together with the industry associations representing energy-intensive sectors, a common declaration. This declaration contains a number of policy recommendations for the Commission and explained our common concerns regarding risks and challenges of deep decarbonisation.

The work of the High-Level Group resulted in a masterplan for the deep decarbonisation of heavy industry. This plan was discussed internally and externally. The Industrial Policy Committee also



started the discussion on the development and use of a taxonomy on sustainable investment as a tool to attract investment into the green economy. Furthermore, industriAll was involved in several initiatives to promote the roll-out of carbon capture and storage as a necessary solution to deal with the hard-to-abate process emissions of heavy industry.

Due attention, by means of a position paper, was also paid to the 'Clean Energy for All' package. It consisted of eight legislative acts regarding energy efficiency, renewables and the electricity market design which provided a comprehensive update of the Energy Union strategy which aims to facilitate the transition away from fossil fuels towards cleaner energy and less greenhouse gas emissions.

To assess the impact of the new European climate plan 2050 ('A Clean Planet for All') on industry, the Industrial Policy Committee worked closely with the energy network to develop a comprehensive position paper on the opportunities and challenges of becoming carbon-neutral by 2050.

The Industrial Policy Committee is deeply engaged in the subject of the circular economy. The transition from the current 'linear' economy, where matter flows from the mine to the



Just Transition and Heavy Industries Roundtable, Stockholm, August 2019.

landfill, to the future circular economy, where the economic and ecological value of products is maintained for as long as possible, will be one of the greatest transformations of industry in the 21st century. It will be one of the main contributors to the mitigation of climate change. For the circular economy to achieve the required levels of quality and cost, it must implement industrial methods and be fair to workers. This was analysed in the Policy Brief 'An Industrialised Circular Economy' (July 2018). The document positioned industriAll Europe as a recognised stakeholder in the policy debate.

IndustriAll Europe was closely involved in the discussions on the fourth trading period of the emissions trading system. The main objective, in order to avoid carbon leakage, was to maintain the allocation of free allowances to the energy-intensive industries at the level of the 10% best performers. The result was satisfactory although the implementation should be closely monitored. The issue of combating carbon leakage was also addressed in an EESC opinion on 'border adjustment mechanisms'.

The potential impact of the low-carbon transition on jobs was discussed at several occasions on basis of econometric surveys drafted by Cambridge Econometrics.

IndustriAll Europe organised a workshop at the COP24 meeting in Katowice and contributed to the drafting of the Silesia Declaration that was signed by more than 50 countries and which addresses the social dimension of climate change policies.

IndustriAll Europe is a member of the High-Level Steering Group of the European innovation partnership on Raw Materials, and of the Coordinating Group of the European Circular Economy Stakeholder Platform. It also participates actively in the proceedings of the European platform for coal regions in transition.

## Trade

Trade has been a very important topic in recent years. IndustriAll Europe was a member of the Advisory Group for the controversial Transatlantic Trade and Investment Agreement (TTIP) until these negotiations were put on hold after the election of Trump. The conclusion of the EU-Canada Comprehensive Economic and Trade Agreement (CETA) led to a heated debate on Investment-State Dispute Settlement (ISDS).

IndustriAll Europe was also closely involved in preparing legislation on a new anti-dumping procedure for non-market economies (where non-respect of core labour standards is to be considered a serious market distortion), the strengthening of trade defence instruments (involving a partial lifting of the lesser duty rule and integration of social and environmental standards in the calculation of the injury margin) and the creation of a Europe-wide screening mechanism for foreign direct investments.

Alongside the position paper on trade policy ('IndustriAll Europe calls for a New Approach to Trade Deals'), in which we propose a number of red lines not to be crossed in free-trade agreements, the IPC also prepared a position paper on globalisation ('Time to Change the Rules of the Globalisation Game'). The aim of this paper was to find answers to the current rise of populism. The paper also provides our reaction to the Commission's reflection paper on harnessing globalisation.

To deal with the growing role of China in our sectors, a seminar bringing together trade union representatives from Chinese-owned companies inside the EU was organised in 2017 together with the ETUI. The objective was to discuss China's industrial strategy as well as the social and economic situation of Chinese subsidiaries in the EU.

Brexit will have deep implications for industry in both the UK and the EU. It has been estimated that, in the case of a hard Brexit, 500,000 jobs are at risk in the UK while 1.2 million jobs in the EU-27 are under threat. To avoid disruption in industrial value chains, industriAll Europe supported a soft Brexit (with the UK staying inside the customs union). We argued that whatever the outcome of the divorce process might be, a hard Brexit must be avoided at all costs. Any future free trade agreement should continue to apply the EU social acquis and contain a clause that prohibits any lowering of social standards. IndustriAll Europe was able to discuss its concerns with the Commission's Article 50 Task Force, meeting with them in January 2018. Our debates on Brexit were supported by a position paper which tried to assess the impact on industrial workers.

IndustriAll Europe is closely following the unilateral imposition of trade tariffs by US President Trump which could result in tit-for-tat trade wars. This would seriously undermine the post-war multilateral rules-based trading order. We also expressed our concerns regarding the current crisis in the WTO, resulting from the US refusal to nominate new judges for its appellate body. This will make the WTO useless as it will lose its power to enforce decisions and will have a deep impact on our rules-based international trade order.

IndustriAll Europe was selected as a member of the Trade Expert Group, convened by the European Commission, to monitor European trade policies. It allowed industriAll Europe to have direct contact with the Commission services on important trade issues and ongoing negotiations on free trade agreements.

## **Economic policy**

Time and again, industriAll Europe has advocated for the importance of internal demand in consolidating the economic recovery and preventing a new recession. On the consumption side, this means a real pay rise, elimination of the low-wage sector, tackling income inequalities, increasing security throughout reversing labour market deregulation, and enhancing social protection. On the investment side, it means a fully fledged investment strategy, both private

and public, in support of a digitalised, low-carbon economy. Full use should be made of the leeway created by the improved fiscal position of most Member States, with half of them now enjoying a budget surplus.

How to deepen the European Monetary Union was, and still is, an important but contentious issue on the European agenda. IndustriAll Europe supports the idea put forward by the ETUC of creating a European Treasury, which could be a way to ensure a minimum level of public investment, underpin a positive fiscal stance and limit the widening of macro-economic imbalances between Member States. A common European budget to protect investment from falling, or the creation of Eurobonds to support investment, are other ideas that have been floated. However, many Member States fail to see the need for a central fiscal capacity at the EU level to deal with deep, asymmetric economic shocks which could endanger the very existence of the euro area. The proposed anti-shock fund and the reform support programme can only be seen as first timid steps in a process to reinforce macro-economic resilience inside the eurozone.

Tax avoidance is a major problem. As such, the Industrial Policy Committee considers the introduction of a Common Consolidated Company Tax Base and the introduction of country-by-country reporting, together with the European anti-tax avoidance package, as steps in the right direction. Another challenge that deserves to be addressed urgently is the taxation of the digital economy.

IndustriAll Europe was involved in drawing up the Investment Plan for Europe (the Juncker Plan), which proved to be successful as it will support 1.7 million jobs by 2022.

As quality jobs for all industrial workers are at the core of our actions, the Industrial Policy Committee invited the ETUI to present their Job Quality Index.

Finally, the Industrial Policy Committee had some first exchanges on the policy intentions of the new Commission: a European Green Deal (with the first European Climate Law and the creation of a one trillion euro Sustainable Europe Fund), the introduction of a carbon border tax, the creation of a Just Transition Fund, the taxation of tech companies, the reform of the WTO, and the steps towards a genuine European Defence Union. IndustriAll Europe took also part in the discussions on the Multiannual Financial Framework, which intends to dedicate 25% of its resources to climate policies.

All in all, industriAll Europe's Industrial Policy Committee has been working hard since the 2016 Congress to keep abreast of economic, social and industrial developments in Europe. It has worked closely with affiliates, partner trade unions, the European institutions, social partners and industry associations to advance the positions of industriAll Europe - safeguarding jobs and workers' rights.



## Company Policy

Since the 2016 Congress held in Madrid, industriAll Europe's company policy has followed four main lines of action.

### Fighting for more EWCs and workers' involvement in SEs

Transnational bodies of information, consultation and participation remain our key platform for trade union action in multinational companies. European Works Councils (EWCs), as well as works councils and worker representation on the boards of companies under the Societas Europaea (SE) legal status, are instrumental to workers' involvement in, and influence on, company strategic decision-making.

Drawing from long-standing experience, the Secretariat has continued to assist affiliated trade unions in setting up and running a current total of ca. 600 European Works Councils and worker involvement bodies in SEs.

Since the start of the new Congress period (June 2016):

- 36 new agreements were concluded, of which 20 are EWC agreements and 16 are agreements on workers' involvement in SEs;
- At least 31 EWC agreements were amended/renegotiated;
- ca. 75 (re-)negotiations are ongoing and monitored on a daily basis.

As in previous Congress periods, the Secretariat monitored and coordinated trade unions' interests and requests to set up new EWCs and worker involvement bodies' bodies involved in SEs in close connection with Company Policy Committee members. The Secretariat also ensured that trade union support to EWC/SE negotiations was put in place.

Building on more than 20 years of practical experience in assisting EWC/SE negotiations, an internal 'toolbox' compiling examples of EWC/SE agreement provisions has been developed and is being continuously updated. Thanks to funding from a European project (see more information below on the 'Link them up!' project), the updated toolbox is now available in three languages (English, French and German).

### Fighting for better EWCs and workers' involvement in SEs

Once established, it is industriAll Europe's core policy to ensure that EWCs and other transnational bodies of workers' involvement follow a trade-union agenda and are driven

by a genuine European perspective. This challenging task is entrusted to industriAll Europe Coordinators of EWCs and SEs.

As in previous Congress periods, the Secretariat has monitored and fostered the nomination of EWCs/SEs Coordinators, and continued to provide them, as well as national affiliated trade unions, with a 'helpdesk' service. The Secretariat also took part on a regular basis in EWC training, seminars and conferences organised by affiliated trade unions and the ETUI.

Despite a clear and shared political commitment, many EWC/SE negotiations are prepared and run unassisted by a national union officer. In addition, one third of existing EWCs/SEs still operate without a trade union coordinator. Where industriAll Europe coordinators are present, the practice continues to vary widely from one company to another. As a result, industriAll Europe has launched a review of existing policies with a view to improving our trade union support to Special Negotiation Bodies (SNBs), EWCs and SEs. Following discussions with the Company Policy Committee, the Secretariat:

- revised the welcome letter sent to newly nominated industriAll Europe coordinators (indicating in particular the Company Policy Committee member acting as contact person);
- encouraged the Company Policy Committee to update and fill the blanks in the list of EWC/SE coordinators;
- published a practical guide on EWC coordinators' role(s) and resources.

Further options to help improve our trade union support to SNBs, EWCs and SEs were discussed by the Company Policy Committee and submitted to the Executive Committee in November 2019. Subsequently, the Executive Committee agreed on a new nomination process for SNB experts and EWC/SE Coordinators and opened nominations to trade unions not coming from a company's headquarter country when these are unable to provide support. The Executive Committee also entrusted the Company Policy Committee with pursuing discussions on further possibilities to hire and train additional trade union officers working on EWC/SE matters.

IndustriAll Europe places special focus on developing further tools and resources to support EWC/SE Coordinators and members in their activities. To provide them with additional legal guidance, an ad-hoc working group of the Company Policy Committee cooperated with the ETUI to finalise the ETUI database of EWC-related court cases which was launched online in early 2017. A new series of publications entitled 'Recommendations to worker representatives in EWCs and SEs' was launched, providing EWC/SE Coordinators and members with practical tips on how to anticipate and handle topical developments in their company. A first issue on 'Anticipating the impact of Brexit on multinational companies' was initially published in January 2017. This document was updated and later revised together with other European trade union federations which adopted joint practical recommendations in September 2018. Other issues are under preparation at the time of writing, focusing on how to tackle digitalisation and

equal opportunities in EWCs/SEs. The recommendations to EWCs/SEs on how to contribute to transnational organising actions, developed within the framework of an industriAll Europe/ETUI training, will be integrated into the wide range of materials industriAll Europe is compiling on matters related to Building Trade Union Power.

Finally, a 'Tools & Resources' section was set up on the new website. Here, trade union officers supporting SNBs, EWCs and SEs, as well as EWC and SE members themselves, can find those new materials and other materials developed by the Secretariat or affiliated trade unions as well as materials developed externally.

### **Fighting for socially responsible anticipation and management of change in multinational companies**

Despite public announcements about a European economic recovery, large restructuring plans, including plant closures and massive job cuts, have continued apace, and further have increased the need for trade union coordination across borders. Against this background, the Secretariat has significantly stepped up its efforts in supporting European trade union action in multinational companies undergoing massive restructuring.

Since June 2016, with the support of two-year funding from the EU which helps cover meeting costs (information on the 'Link them up!' project below), trade union coordination groups were set up in the following companies:

- Alstom Transport / Siemens Mobility
- Amcor (managed jointly with UNI Europa)
- ArcelorMittal / Liberty House Steel
- Caterpillar
- General Electric – ex-Alstom Power
- Honda
- PSA group (including Opel/Vauxhall)
- Tata Steel Europe / thyssenkrupp steel
- thyssenkrupp group

The cross-border solidarity built up in these cases fostered a shared understanding and strong commitment to act together which, in turn, resulted in the adoption of common demands and joint declarations. Concrete actions to defend our trade union demands, step up the pressure and develop counter-power were then implemented by the Secretariat in different ways: media campaigns (via press releases and social media), meetings between trade union delegations and top-level management, through political lobbying vis-à-vis the European Commission and European Parliament, or through European Actions Days (at Caterpillar on 18 November 2016, at General Electric / ex-Alstom Power on 25 April 2018, and at Alstom Transport / Siemens Mobility on 30 May 2018). The final conference of the 'Link them up!' project conducted a critical



German workers take part in Alstom-Siemens Day of Action in May 2018.

assessment of our trade union coordination and joint actions in those company cases, with a focus on what worked well and what didn't. Drawing upon the conference conclusions, the Company Policy Committee has launched a reflection on how to improve industriAll Europe's support for trade union action in instances of transnational restructuring.

Other requests for European coordination were received (e.g. on Bombardier, Siemens-Gamesa, etc.), which have not led to the setting up of ad-hoc trade union coordination groups but which the Secretariat followed-up directly with concerned affiliates.

Interpreting company strategies to better anticipate change and managing transnational restructuring in the most socially responsible way were also core topics of the final conference of an EU-funded project entitled 'Working together for European recovery: workers' involvement in companies' future as a cornerstone'. The meeting was jointly organised by European trade union federations and Syndex and held in Berlin in October 2016. A joint ETUI/industriAll Europe seminar dedicated to investment and labour strategies in Chinese multinational companies was also held in Brussels on 22 March 2017.

### **Fighting for stronger rights to information, consultation, participation, and better corporate governance**

The Secretariat has been active in developing political lobbying to fight for stronger rights for workers' involvement in companies' strategic decision-making. This work has been carried out in close cooperation with the ETUC and with a newly established coordination group of European trade union federation officers and policy advisors in charge of company policy.

Discussion around the EWC Recast Directive has taken centre stage. This was spurred by the 20th anniversary of the entry into force of the first EWC Directive and 30th anniversary of the first EWC-type body we set up in a French company (see industriAll Europe press release from 22 September 2016). However, the most pressing reason for this focus was the June 2016 deadline for the European Commission to review the Recast Directive and make “appropriate proposals where necessary”. While the European Commission eventually failed to meet the deadline (and recorded a two-year delay in the end), the Secretariat, in close connection with the Company Policy Committee, delivered its own critical review of the EWC Recast Directive (see the internal working document ‘industriAll Europe’s assessment of the EWC Recast Directive’ finalised on 7 September 2016), which later led to the adoption of industriAll Europe’s priorities for a robust EWC Directive (see the position paper adopted on 2 December 2016). IndustriAll Europe concluded that changes in the EWC Directive are required to make it more robust, by ensuring that information and consultation rights are enforced, enforceable and more effective, and that the practical implementation of some of the provisions of the Directive are significantly improved. This formed the basis for a joint position ‘Towards a robust EWC Directive’ by industriAll Europe, EFBWW, EFFAT, EPSU, ETF and UNI Europa that was adopted on 31 January 2017. The joint ETUF position later served as a basis for the ‘ETUC 10 priority demands for a modern EWC Directive’ adopted by the ETUC Executive Committee in March 2017. Since then, our conclusions and demands were repeatedly expressed to the European Commission at various informal gatherings, internal ETUC meetings and public conferences.

Confronted with inaction by the European Commission and a lack of political will to strengthen workers’ right to information, consultation and participation, industriAll Europe published on 9 November 2017 a press statement calling on the EU to deliver, as swiftly as possible, an unambiguous right to democracy in the workplace. IndustriAll Europe supported the ETUC when it adopted a strategy for more democracy at work in March 2018. Since then, industriAll Europe has actively contributed to and promoted this ETUC strategy at public events, at EWC and national affiliates’ meetings, and by adhering to joint statements.

In addition to active political lobbying, industriAll Europe has closely monitored EU (legal) initiatives and acted together with the ETUC (e.g. answering public consultations) to defend workers’ interests in the following areas:

- proposal for a Single-Member Limited Liability Company (SUP), which the European Commission eventually dropped;
- proposal for a company law package (on cross-border conversions, divisions and mergers), adopted in 2019;
- proposal for a Directive on preventive restructuring frameworks, second chance and measures to increase the efficiency of restructuring, insolvency, adopted in 2019;
- proposal for a Directive on corporate tax transparency (country-by-country reporting).



The Secretariat was also actively involved in several ETUC projects: on letterbox companies, on strengthening 'Workers' Voices in Cases of Insolvencies', on company mobility and workers on corporate boards, on workers' rights in subcontracting chains (due diligence), as well as the annual ETUC EWC conference, and supported, along with the CPC, the ETUI's second survey on EWCs.

## European Project: 'Link them up!'

With the recognition of transnational information, consultation and participation rights in EU law, a multi-level system of industrial relations has emerged. Various structures involve workers in multinational companies' decision-making at the local, the national and the European level (works councils, boards, trade union bodies). This multi-level system poses challenges and opportunities for trade unions and employers, especially in ensuring sound anticipation and management of change. The EWC Recast Directive provides an incentive to take up the challenges by using an under-tapped yet powerful resource: the coordination of the various levels and structures of worker representation. However, the new provisions failed to achieve their objectives as complexities and legal uncertainties remain high. Also, no such provision on the linking of levels exists in the other (SE, European Cooperative Society, cross-border merger) Directives.

The project 'Link them up! Towards strengthened coordination of national and European levels for effective information-consultation-participation in times of restructuring' intends to address shortcomings by delivering practical and policy recommendations on how to better link information, consultation and participation across different levels and structures in the event of restructuring. Recommendations were drawn from real-life cases in the manufacturing,



Romanian workers take part in Alstom-Siemens Day of Action in May 2018.

mining and energy sectors. Company-level trade union and worker representatives affected by a transnational restructuring met to exchange experiences, agree on a common strategy and reflect upon their practice of coordination in 15 company-based meetings. The identified good practices and their policy implications for the EWC Recast Directive and the EU Quality Framework for Restructuring were discussed and developed from a cross-company and cross-sectoral perspective at a final conference. The conference brought together some 100 participants and took place in Blankenberge (Belgium) on 24-25 September 2019. The resulting practical recommendations were integrated into an updated version of our toolbox for EWCs and SE-WCs.

In the course of the project (December 2017 - November 2019), 15 company-based meetings took place in Brussels on the following cases:

- Tata steel / thyssenkrupp steel (4 Dec 2017, 10 Jan 2018, and 24 January 2019);
- Alstom Transport / Siemens Mobility (16 Jan 2018, and 14 Feb 2018);
- General Electric / ex-Alstom Power (12 March 2018 and 18 February 2019);
- ArcelorMittal (26 April 2018, 27 September 2018, 29 November 2018 and 9 July 2019);
- PSA / Opel-Vauxhall (4 May 2018 and 22 October 2019);
- Honda (5 April 2019);
- thyssenkrupp (26 November 2018).

## Collective Bargaining and Social Policy

Before the current coronavirus crisis, a fragile upswing was taking place in the European economy. Both production and employment had started to grow again after the financial crisis. However, many of the new jobs are 'mini-jobs' or low-paid jobs. What recovery there had been was built on 'bad-jobs'. Decentralisation and attacks on bargaining structures have continued to be implemented by governments. This, in addition to lower trade union density in most countries, leads to reduced coverage rates. Since the crisis, millions of workers in the European manufacturing industries have lost the protection of collective agreements.

Since 2008, especially in Member States badly hit by the crisis, not only has it been made easier for companies to deviate from sectoral or national collective agreements, but legal changes have also weakened the 'favourability principle', which ensures the primacy of sectoral agreements over company-level agreements.

Against this background, on 12 and 13 December 2017, the industriAll Europe Executive Committee adopted a resolution rejecting the decentralisation of collective bargaining imposed by institutions and national governments and the attempt to weaken the wage-setting power of trade unions.

As wage increases are modest, wage shares of GDP are falling, and inequalities are increasing. Wage developments are lagging behind productivity in most Member States. The crisis also put an end to upward convergence between most 'new' Member States in Central and Eastern and Southern Europe and those in Europe's core.

From autumn 2016 to the end of 2018, the EU-funded project, 'Building stronger trade unions through efficient coordination of collective bargaining', was central to the work of the Collective Bargaining and Social Policy Committee. It focused on coordination of collective bargaining and in particular on key issues such as the wage coordination rule, common demands and the European collective bargaining network (Eucob@n) as well as strategies for Building Trade Union Power.

Five regional workshops were organised in Copenhagen (May 2017), Prague (October 2017), Rome (January 2018), Frankfurt (February 2018) and Bucharest (April 2018).

The workshops showed that realities and challenges vary a lot across Europe. However, all unions share one thing in common: they want to strengthen collective bargaining and, in particular, build or rebuild and extend sector agreements. There is pressure on collective bargaining structures almost everywhere. The fight against attacks on existing structures and decentralisation is top of the agenda in all regions. For many unions, achieving an increase



in real wages remains a top priority. Precarious work - which exploded as a result of labour market deregulation – and, in particular, temporary work (agency work and fixed-term contracts), poses massive challenges to trade unions. Training continues to be topical and high on the trade union agenda as the challenge posed by digitalisation for workers' skills grows. Movement of workers especially from the periphery to the centre of Europe is increasing and further aggravating the economic and social imbalances between EU countries.

The project was rounded off in December 2018 with a Collective Bargaining Conference in Bratislava. The Conference, which was the largest event organised by industriAll Europe during the Congress term, gathered over 200 trade unionists from 28 countries. Collective bargaining and social policy were discussed in light of digitalisation. The following position papers were centre-stage in the discussion:

- a general resolution on Collective Bargaining;
- a Charter on working time;
- a forward-looking paper on wage policy including the wage coordination rule revisited;
- requirements for a decent pensions system.

All the papers endorsed by the Collective Bargaining Conference were later formally approved by the Executive Committee.

As a direct follow-up to the project and the Conference, industriAll Europe launched the 'Together at Work' campaign for collective bargaining on 26 September 2019. The campaign aims to promote the benefits of collective bargaining around Europe, for workers but also for the economy and society as a whole.



Collective Bargaining and Social Policy Conference, Bratislava, 6-7 December 2018.

During the campaign, we gave the floor to workers. They explained why collective bargaining and strong trade unions are so important to them, their colleagues and their families. The slogan of the campaign 'Together at Work' reflects the essence of collective bargaining: workers come together at work and fight for better working conditions and pay through their trade union, which, together with employers, negotiates a collective agreement.

The campaign was structured into six targeted sub-campaigns, each lasting one month and focusing on specific groups: workers, young workers, women, and employers. Every month, new material linked to these targeted campaigns was distributed among our affiliates, in hundreds of companies, in conferences, on social media, in publications, all over Europe. A special website ([www.togetheratwork.eu](http://www.togetheratwork.eu)) was set up to support the campaign.

This campaign targeted workers and had clear political demands:

- national and EU policymakers must adopt a public discourse about the value of collective bargaining and allocate dedicated national and EU support for capacity building of social dialogue and collective bargaining;
- the European Commission must propose a legal initiative to support collective bargaining;
- where not yet done, Member States must ratify the ILO Conventions on the fundamental right to collective bargaining, as well as the Council of Europe's decisions on this topic;
- employers must sit at the negotiating table and acknowledge that collective bargaining can also benefit companies and the economy.



Finnish Prime Minister supporting Together At Work campaign at the Executive Committee in November 2019.

Since its publication on 26 April 2017, and its proclamation on 17 November 2017, the European Pillar of Social Rights has been a priority for industriAll Europe. A policy brief issued in July 2016 gave a first analysis of the 20 principles of the Social Pillar. Ever since, we have been closely following the different legislative proposals, providing analysis to industriAll Europe affiliates as well as voicing our positions within the ETUC and towards the EU institutions. The main initiatives have been the Directive on transparent and predictable working conditions, the Directive on work-life balance, the Directive on whistleblower protection, an interpretive Communication on working time and a recommendation on access to social protection.

As far as the integration of the social scoreboard into the European Semester is concerned, the completion of the 2018 cycle showed greater attention to the social impact of policies proposed by EU economic governance. However, coordinating social policy remains a challenge and will likely remain so as long as the current fiscal stability constraints dominate the EU semester. The 2019 European Semester showed little progress in this respect despite political pressure from the trade union movement.

IndustriAll Europe is actively involved in the ETUC Collective Bargaining and Wage Scoreboard which aims to establish a trade union benchmarking exercise to coordinate collective bargaining and wages within the EU Semester.

IndustriAll Europe welcomed the decision to set up a European Labour Authority (ELA) which is meant to act as a support service for national enforcement authorities; support trade unions to pursue cases across borders; play a mediation role between national authorities, for example in social security disputes; and help to improve national implementation of EU labour and social security law. We insisted that it must be able to carry out its tasks effectively, with obligations on Member States to cooperate, provide assistance and conduct joint inspections and share databases that combine the EU Social Security Number and company information. However, we argued that it should not interfere with social partners' autonomy and collective bargaining and that it must be an independent body with tripartite governance. A regulation was adopted in early 2019. Bratislava will host ELA's seat.

IndustriAll Europe was actively involved in the ETUC Pay Rise Campaign which was officially launched in December 2016 and also in the European Alliance on Upward Wage Convergence that followed the campaign. On 14 and 15 February 2017, industriAll Europe took an active part in the launch Conference in Sofia titled: 'Time for Our Recovery – Europe needs a pay rise' and later, on 21 September 2017, in the workers' hearing organised in Bratislava by the ETUC. On that occasion, Luc Triangle stressed the need to bridge the gap and address the wage disparities between Eastern and Western Europe.

The ETUC Pay Rise Campaign also ties in with the motion adopted at the 2016 Congress in Madrid on equal pay for equal work. This led to the adoption of a resolution by the industriAll Europe Executive Committee in June 2017 entitled 'ETUC Pay Rise Campaign, why it's a priority

for industriAll Europe' which outlined the concrete involvement of industriAll Europe in the ETUC campaign. The Workplace Week in May 2018 enabled us to highlight the many aspects of pay gaps in Europe through the testimonies of workers, trade union officers and leaders explaining why European workers need a pay rise.

On 26 June 2018, industriAll Europe was in Sofia together with the EU Commissioner for Employment, BusinessEurope, CEEP, SMEunited and representatives of many EU governments to support the European Alliance for Upward Wage Convergence launched by the ETUC. We managed to convince CEEMET, the European Metal Employers Association to speak at the Conference. CEEMET Director General, Uwe Combüchen, stressed the importance of collective bargaining between autonomous partners, especially in connection with wage setting. He also stressed that wages should follow productivity developments. The European Commission and national governments now have to deliver on their promises.

It is worth mentioning our involvement in the Posting of Workers Directive. The adoption of a compromise between the European Parliament and the Council on 29 May 2018 was a step in the right direction. It confirms the principles of equal pay for equal work in the workplace. However, many forms of social dumping still prevail in Europe.

Finally, industriAll Europe participated in the ETUC project on Transnational Company Agreements (TCA) titled 'Building on experiences: a win-win approach to transnational industrial relations in MNCs' which brought together the ETUFs, ETUC and BusinessEurope. Over the last two years, industriAll Europe was involved in the follow-up of several existing TCAs and renegotiated, based on the mandate procedure, several TCAs (Safran, Engie, and PSA).

We are still dealing with the refugee crisis and how to integrate migrants into the labour market.



## Building Trade Union Power

At the Congress of industriAll Europe in June 2016, affiliates committed to making 'Building Trade Union Power' a top priority on the European agenda. The main focus of this new area of work is to make trade unions stronger, grow membership and to create greater transnational solidarity.

The implementation of Building Trade Union Power (BTUP) has so far been characterised by two stages. In the first stage, the BTUP Task Force was created and a first BTUP Action Plan for company-level organising was adopted. In the second stage, a strategic organising unit was established, which has facilitated a more systematic and comprehensive approach to this priority area.

During the first stage, the BTUP Task Force and the Action Plan 2017-2018 defined the criteria for companies to be targeted for organising. Affiliates submitted company cases where they thought organising actions would benefit from transnational cooperation. At the BTUP Task Force meeting in October 2017, a first group of company cases were put forward as target companies for bilateral cooperation between local unions and trade unions from the country of the company's headquarters. For a second group of submitted cases, industriAll Europe promoted bilateral cooperation by connecting the trade union proposing an organising action with the union supporting this action, so that they could jointly work out an organising action plan for the target plants or companies.

At a workshop held between 13 and 15 November 2017 in Bratislava, and later in January 2018 at a joint Company Policy Committee/BTUP Task Force training seminar in Budapest, the participants focused on key topics for company organising: successful national and transnational organising activities; general policies for transnational company organising; and development of tools for European Works Councils (EWCs). At both meetings, the representatives of targeted companies were invited to exchange and build transnational teams for organising workplaces in the targeted companies. In this way, industriAll Europe has enabled cooperation between affiliates of potential target companies.

IndustriAll Europe ran a Collective Bargaining Project in 2017-2018 that focused on new trends in collective bargaining. One of the main topics was the need for close coordination between affiliates on wage development and the need for reinforcing strong sectoral collective-bargaining structures, which are key for building trade union power and gaining new members. More information can be found in the Collective Bargaining section of this report. The project also resulted in the collective bargaining campaign, 'Together at Work'.

In October 2017, industriAll Europe received a positive response from the European Commission for its project submission entitled 'Strengthening the capacity of trade unions in South-East Europe to improve wages and working conditions in the garment and footwear sectors'. The project ran from January 2018 to November 2019. Its focus was - beyond mapping companies' supply chains and analysing the sector - on increasing membership, reaching collective agreements and building strategic coalitions between local civil society organisations and our affiliated trade unions. Between 2018 and 2019, the participating trade unions managed to recruit thousands of new members in South-East Europe. They also initiated negotiations between our Romanian affiliates in the sector and the fashion brand H&M and increased awareness in the Benetton brand about labour relations within their suppliers in the region.

In March 2018, a debate took place between industriAll Europe and some major affiliates on the future of the Building Trade Union Power priority in industriAll Europe. They agreed on the need for all trade unions to make concrete commitments. As a result, industriAll Europe moved to the next stage of improving the strategic focus on Building Trade Union Power.

The recruitment of a Strategic Organiser enabled us to move further with this priority: setting strategies on comprehensive organising, assisting affiliates in organising campaigns, identifying companies, sectors and target groups, and providing training seminars.

In 2019, discussions were initiated to work more systematically on BTUP in the aerospace sector, the automotive sector, the pharmaceutical industry sector as well as in the Youth Working Group and White-Collar Working Group. The Aerospace Network decided in June 2019 to support bilateral cooperation for organising in Diehl Aerospace. This collaboration was set up between the affiliates concerned, IG Metall (DE) and VDSZ (HU). IndustriAll has been coordinating the ongoing activities.

In 2019, industriAll Europe developed a training concept for company-level organising and in early 2020 a manual for company-level organising was published.

In 2020, a space was created on industriAll Europe's website for presenting the best practices of our affiliates.

The strategic organising unit held the following training seminars on organising for our affiliates in 2019:

- January: for EWC members and EWC Coordinators, together with the ETUI;
- March: in Hungary for Executive Committee members of the Chemical Workers Union VDSZ, together with IGBCE;
- September: for youth leaders in cooperation with the ETUI on organising principles, initiatives and best practices in organising young workers;

- October: for textile sector affiliates from Albania, Bosnia-Herzegovina, Bulgaria, Croatia, Montenegro, Romania and Serbia, in cooperation with ACV-CSC METEA;
- October: for all affiliates in Bosnia-Herzegovina.

Following the Task Force's decision in May 2019 to take a 'best-practice approach', industriAll Europe has been supporting OS KOVO (CZ) in its intention to develop towards an organising union. At the time of writing, we are working on concrete company organising campaigns in the Czech Republic.



Building Trade Union Power training for OS KOVO activists, October 2019, Prague.



# **Sectoral Networks**



## Aerospace

The Aerospace Network has identified the following priorities: establishing a clear trade union position and demands on digitalisation and skills for the sector, highlighting workers' concerns in relation to Brexit, actively promoting the future of the EU space sector, increasing trade union co-ordination and building trade union power.

The Network has continued to improve its visibility at the EU level through high-level political advocacy calling for an ambitious sectoral industrial policy. Improved relations at the EU level have resulted in affiliates taking part in, and presenting at, events with MEPs and European Commissioners, including the European Aerospace conference hosted by MEP Willmott with Commissioner Bieńkowska (2016) and the EU Aerospace Day (2017) with the Sky and Space Interest Group (MEPs), as well as various high-level events in the sector. One notable result was the publication of the Consultative Commission on Industrial Change's (CCMI) opinion, 'Challenges and Industrial Change in the EU Aerospace Sector', which received wide-spread European support and where industriAll Europe acted as the trade-union expert. The Network has committed to continue its EU advocacy work in the new mandate, 2019-2024.

In line with industriAll Europe's policy of establishing social dialogues in sectors where this is meaningful and feasible, efforts were made with ASD Europe (the industry association representing the European aeronautics, space, defence and security industries) to establish a Sectoral Social Dialogue Committee, recognised and supported by the European Commission. After making a joint application with ASD Europe in 2017, talks took place between the social partners and the Sectoral Social Dialogue Committee for the Metal Engineering and Technology industries (SSDC MET) to try and find a common proposal. However, the application was eventually blocked by the current ASD Europe President and the subject is now on hold.

Brexit poses a significant risk to the aerospace sector due to the integrated nature of supply chains across Europe. As such, workers on both sides of the Channel would be negatively affected by changes to the Customs Union and the Single Market, which would give a further advantage to Europe's competitors. IndustriAll Europe has facilitated many meetings with MEPs, Commission representatives and Permanent Representatives to the EU to present our positions on behalf of European aerospace workers. The position paper 'Impact of Brexit on the Aerospace Sector' (2017) clearly outlines the demands of aerospace workers and has been used to lobby UK and EU decision makers involved in the Brexit process.

During this Congress period, a greater focus was placed on the European space sector. This sector, which is much smaller than the aeronautics sector, provides highly technical and decent jobs to thousands of workers in Europe and is a key area for the EU for R&D and innovative technology. IndustriAll Europe organised a Space Workshop on 29 May 2018 with experts from various trade unions, Airbus, Safran and ASD Space presenting their demands for the future

of the sector. The position paper, 'EU Space Strategy - Safeguard competitiveness, safeguard jobs' (2019), has been well received and industriAll Europe continues to push for urgent action to protect the future of the European industry towards the EU Institutions, industry, national governments and the European Space Agency.

Trade-union co-ordination was identified as a priority and a special meeting was arranged in Rzeszow (Poland) in 2019 to improve co-ordination between trade unions from different countries and between workers in larger manufacturers and through supply chains. Participants from the Central and Eastern European countries included Poland, Romania and Hungary and discussions took place about how to continue co-ordination in light of budgetary restrictions (translation and travel costs). Participants highlighted the success of the meeting and further co-ordination is planned in 2019/2020.

Building trade union power was highlighted as a key project following the increase in trade union co-ordination in the sector. The Network has selected Diehl Aerospace as a project and industriAll Europe is working with German and Hungarian trade unions to ensure that workers on the site are unionised and have good co-ordination.

The Network continues to remain very active, with quarterly Select Working Party (SWP) meetings hosted by affiliates and regular site visits being organised.

## Automotive

The automotive industry finds itself at a crossroads and faces a number of simultaneous structural changes. The sector must transition from a model heavily reliant on hydrocarbon fuels to a low-carbon, digitalised industry. Mass production and consumption will be replaced by sustainable production and consumption. Therefore, the automotive industry must embrace the digitalisation of cars, both in the production chain and as consumer products. Cars are also increasingly connected, and they contain more and more features for automated driving. In order to achieve carbon neutrality by 2050, new CO<sub>2</sub> emission standards will inevitably lead to an ever-higher share of low and zero-emission vehicles. Mobility services will reduce the need for individual car ownership. All this will dramatically change the structure of the European car industry. However, the shape and speed of these disruptions are not yet known. This will depend on technological developments, the cost of innovation, changes in the regulatory framework, the development of new business models, evolving consumer preferences, and developments in the global trade. However, the countdown has undoubtedly begun and a mass breakthrough of Electric Vehicles (EVs) is expected in the coming years. As a result of the combination of these structural changes and the end of a boom period in the economic cycle with stagnating car sales, the sector will have to confront deep restructuring processes affecting thousands of workplaces.

In order to deal with these challenges, industriAll Europe engaged in a wide range of initiatives. Our organisation participated in the High-Level Group GEAR 2030 which brought together automotive stakeholders, the European Commission and the EU Member States. An analysis of the automotive value chain was conducted over two years. A Sherpa Group and eight working groups discussed the current and future situation of the automotive sector in a fast-changing landscape and made recommendations for EU policy initiatives on topics such as globalisation and the impact of China, connected and automated driving, the decarbonisation of transport, research, structural change in the value chain, skills, and the regulatory framework.

IndustriAll Europe defined its position on the upcoming new CO<sub>2</sub>-emission standards for passenger cars. In several hearings and stakeholder meetings this position was presented to decision makers and the wider public. For industriAll Europe, a balance must be struck between environmental and social sustainability. As electric vehicles (EVs) are much simpler to produce and require less maintenance, the decarbonisation of transport risks making many automotive workers redundant.

Together with IG Metall, we organised an event in the European Parliament to present the results of a study conducted by the German Fraunhofer Institute on the impact of electrification on jobs in the automotive sector.

IndustriAll Europe participates in the Steering Committee of the DRIVES (Development and Research on Innovative Vocational Educational Skills) project, a stakeholder partnership for the development of sectoral skills. DRIVES is part of the Blueprint for Sectoral Skills Development in the automotive sector. The Blueprint is an initiative set up by the European Commission as part of its New Skills Agenda.

We also participated in various studies as part of the 'Fuelling Europe's Future' research project, looking at the macro-economic impact of the electrification of transport. These were requested by the European Climate Foundation and carried out by Cambridge Econometrics.

IndustriAll Europe analysed the possible impact of Brexit and the Transatlantic Trade and Investment Agreement (TTIP) on the automotive industry. As part of our wider monitoring, we continue to carry out a yearly overview of the main structural and cyclical developments in the sector. Special attention is paid to mergers and acquisitions, changes in the supply chain and in the employment structure, the development of low emissions vehicles, the trend towards mobility services, and the changes in the regulatory framework after 'diesel gate'. We also assessed the impact of electrification on the structure of the sector and campaigned for full supply chain capacity for electric vehicles inside the EU, including batteries, in order to reduce dependency on Asian imports.

In the political arena, we lobbied for special support for carbon-intensive regions and sectors (which should include the automotive industry and the regions).

We supported the FNV transport branch in their campaign on working conditions in the car-transportation sector and the responsibility of Original Equipment Manufacturers to respect labour rights in their supply chains.

IndustriAll Europe acted as co-rapporteur and expert in two opinions of the Consultative Commission on Industrial Change (CCMI) related to the automotive industry: 'The automotive industry on the brink of a new paradigm?' and 'Artificial Intelligence in the Automotive Industry'.

We held internal discussions on the merger between PSA and Opel, the recent wave of restructurings and how to anticipate or manage them, how to build trade union power along automotive value chains, the emissions scandal, and IG Metall's 'Transformationsatlas'.

Trade union consultants Secafi and Syndex were invited to discuss their activities in the automotive industry and how they could be of help to our members.

Finally, industriAll Europe was involved in the preparation of the different road transport packages prepared by the Commission (including a new system for monitoring and reporting CO2 emissions and fuel consumption of new heavy-duty vehicles.)

## Basic Metals

The Basic Metals Network has identified the following priorities: future industrial policy for the sector (including the urgent need for investment in sites across Europe), tackling global overcapacity and unfair competition, and working towards the decarbonisation of the sector without negatively affecting workers.

As follow-up to the 2016 Congress in Madrid, industriAll Europe organised a huge steel demonstration with 15,000 workers in November 2016 under the slogan 'No to a Europe without Steel'. Ahead of the 2020 Congress, the Network has drafted a new 'European Steel Action Plan', which will form part of an ambitious European campaign to protect the European steel industry and its workers.

The 'European Steel Action Plan' was discussed at two workshops in 2019 and will be used as a basis for work with the new EU Institutions, Member States and industry. The trade union demands cover industrial policy, trade, the environment, energy, research and development, and social policy and employment. IndustriAll Europe will decide whether another European demonstration is needed to highlight the demands of the trade unions.

The Network has worked with industriAll Europe's Company Policy Committee on the Tata Steel and thyssenkrupp joint venture (eventually abandoned) and ArcelorMittal's purchase

of Ilva and the resulting sale of six sites in Europe to Liberty House. Regarding the latter, a special negotiation group was set up by industriAll Europe that was tasked with negotiating a European Framework Agreement to support the integration of the new Liberty House sites in Europe. Various trade union meetings took place on these issues in 2018 and 2019, organised by industriAll Europe, and members continue to be supported on these matters.

Global overcapacity and unfair competition remain the main threats to the European steel and aluminium sectors. IndustriAll Europe has therefore campaigned for modernised Trade Defence Instruments and a New Method of Anti-Dumping, both adopted by the EU in 2018. IndustriAll Europe continues to call for transparency and for an end to unfair state aid by lobbying the EU and playing an active role in the OECD Steel Committee. In 2019, industriAll Europe was the first trade union organisation to address the Global Forum of Steel Excess Capacity (made up of Ministers from the G20 countries).



'No Europe without Steel' demonstration in November 2016, organised by industriAll Europe.

The huge tariffs announced by the US in 2018, under Section 232 (25% on steel and 10% on aluminium), are a real threat to European industry. IndustriAll Europe therefore took part in the European Commission's Safeguard Investigation (C.111) and the International Trade Committee's hearing in the European Parliament in 2018 to call for EU safeguards to protect European workers from losing out due to large amount of cheap steel and aluminium being dumped on the market. Lobbying efforts resulted in European safeguard measures being introduced in 2019.

## Chemicals & Basic Materials

The Chemicals and Basic Materials Network dealt with topics such as REACH (the EU regulation on Registration, Evaluation, Authorisation and Restriction of Chemicals) and the future role of the ECHA (European Chemicals Agency) in Helsinki, as well as the Revision of the Directive on European Work Councils (EWCs) and the Revision of the Carcinogens and Mutagens Directive.

Concerning the role of the ECHA, a merger has been proposed between the Scientific Committee on Occupational Exposure Limit Values process, which sets Europe-wide occupational



exposure limits, and the work of the Risk Assessment Committee of the ECHA, which manages the REACH process. The Network concluded that a merger would lead to a shift in focus, which could cause issues like health and safety at the workplace to be sidelined. This discussion led to a joint position with our social partners, which was signed in the presence of former ECHA Executive Director, Geert Dancet.

The Revision of the Carcinogens and Mutagens Directive (CMD) aims to protect the health and safety of workers across the supply chain. The Commission initiated this revision to facilitate its implementation by introducing Europe-wide binding exposure limit values for various substances, which industriAll Europe sees as the essential tools for minimising exposure levels. The Network discussed how we can support the revision, also in relation to the CMD's upcoming reviews.

The European institutions have been working on several legislative initiatives that are relevant to the chemical and basic materials sector. Some of them have been completed (e.g. the Directive to ban single use plastics). Others are currently in preparation or negotiation and are followed closely by the Secretariat. This applies to other initiatives within the European Commission's Plastic Strategy, or to the interface between chemicals, product and waste legislation (communication). The potential consequences of these initiatives were discussed by the Network.

The Network has decided on an Action Plan, defining four key areas for exchange and action:

1. Strengthening European industries involves advocating good framework conditions, incentives for research and development, innovation and the attraction of skilled personnel. Access to raw materials, energy (see below) are fields of interest, as are the opportunities and challenges posed by the move towards a circular economy. Policy demands will be formulated and communicated to the European Institutions.
2. Future European energy and decarbonisation policies pose major challenges to the chemicals and basic materials industries. The Network will assess their impact and potential coping measures and formulate policy demands. We will also re-enforce dialogue with employers, institutions and other interested parties.
3. Digitalisation: several studies have already been conducted on the impact of digitalisation and trade unions' means to influence and shape the changes taking place at company level. The Network will share best practices among its members and with other Networks and Policy Committees.
4. Preparing workers for the industry of tomorrow requires solid training and lifelong learning, but also safeguarding good working conditions with manageable levels of stress for a workforce of all ages within the framework of collective labour agreements.

A joint workshop took place with the European Federation of Building and Wood Workers on the future of the cement industries trade union strategies. Both federations committed to close cooperation in the future.

A Network meeting dedicated to the glass and paper sectors discussed the challenges and opportunities in these industries. Participants looked at the potential consequences of the European climate goals and debated trade unions' positioning. IndustriAll Europe's upcoming project on Decarbonisation and Just Transition was also discussed. Participants evaluated the current NEPSI project, and discussed the opportunities arising from the European bio-economy strategy.

## Energy

The work of the industriAll Europe Energy Network was determined by the implementation of the Energy Union Strategy. The European Commission published the Clean Energy Package in November 2016, putting forward an ambitious set of policy measures in three key areas: renewable energy resources, energy efficiency and the energy market design. Moreover, the package included a new proposal on the Energy Union Governance updating the 2030 Climate and Energy Targets, the EU's contribution to the implementation of the Paris Agreement.

IndustriAll Europe has updated its energy policy position (final approval by the Executive Committee on 12 June 2018 in Sofia) taking account of these developments and expressing its demands for an energy policy embedded in an industrial policy that permits growth and development in our industrial sectors and employment. It also calls for implementing a Just Transition for workers in sectors and regions that will be impacted by the policy decisions, avoiding economic disruption and offering redeployment in affected sectors and regions. The anticipation of change through social dialogue and the re- and upskilling strategies will be key, as will strong social-protection schemes. The demand of industriAll Europe and the ETUC to set up a Just Transition Fund as part of the EU ETS in its 4<sup>th</sup> trading period has been only partly acknowledged. Funding for the Just Transition will be available through the EU Modernisation Fund, which means it is only available in the 10 countries with a GDP 60% below the EU average. However, as part of the European Green Deal, the European Commission proposed in January 2020 to set up a Just Transition Mechanism, including a Just Transition Fund with a budget of EUR 7.5 billion, to support regions heavily depending on fossil fuels.

In November 2018, the Commission published its long-term strategy 'A clean planet for all' with the objective of reaching carbon neutrality by 2050. During 2019, the Energy Network cooperated with the Industrial Policy Committee in developing a position on this strategy and how the transformation can be achieved through deep decarbonisation of industries.

As part of the Energy Union Strategy the European Commission launched a Platform for Coal Regions in Transition in December 2017 with the objective of sharing best practices for structural change and eco-innovation. The platform operates in two working groups, one on structural change and the other on eco-innovation and advanced coal technologies. The platform can be seen as an opportunity to promote a Just Transition and trade union involvement. However, the number of participating countries is still limited, and the employment dimension needs to be strengthened. Trade union participation also needs to be strengthened in the debate.

As these policies determine the framework in which our industrial sectors operate and compete globally, industriAll Europe has called for a renewal of its Energy Network by enlarging its scope to reflect both the needs of the energy producers, but also the needs of energy-intensive industries and the manufacturers of energy installations and equipment. After agreement in the meeting of the Executive Committee in December 2017, all organisations were invited to send nominations. The Energy Network in its new scope should allow industriAll Europe to steer a more inclusive discussion that feeds the work of the Industrial Policy Committee.

At the COP24 that took place in Katowice in December 2018, 55 parties signed the Solidarity and Just Transition Silesia Declaration that has been promoted by the ITUC, ETUC, industriAll Europe and EPSU. After the reference to Just Transition within the preamble of the Paris Agreement, the signature of the declaration is a major step forward to acknowledging the importance of the social dimension in climate policies.

In September 2018, industriAll Europe organised a training seminar with the ETUI to discuss the major challenges and trade union demands regarding the policy and legislative developments mentioned above together with IndustriALL Global Union, ITUC and ETUC.

In 2020 the Network will monitor closely the developments of the European Green Deal proposed by the Commission President Ursula Von der Leyen, containing major elements, such as a climate law enshrining carbon neutrality by 2050 in legislation, a Just Transition Fund, the extension of the ETS, a carbon border adjustment tax, etc. A Communication on the Green Deal was published in December 2019. The Network will work together with the Industrial Policy Committee to reach an industriAll Europe position.

## ICT

Since the industriAll Europe Congress in 2016, members of the Secretariat have participated in one personal meeting with Commissioner Oettinger (Digital Economy and Society), in two High-Level Group meetings and in twenty-seven workshop meetings organised by the Commission. They intervened as speakers in 10 conferences or workshops organised by European institutions or by third parties.

The primary areas of work of the ICT Sector Network and of the Secretariat of were:

- Free flow of industrial data: answer to the consultation of the Commission (2017)
- Artificial Intelligence and Robotics
- Standardisation of ICT, and specifically of the Industrial Internet of Things, in order to prevent monopolies: participation in the 'Digitalising European Industry' initiative by the Commission (2016-2018) and in its Multi-Stakeholder Platform on ICT standardisation (2016-2019)
- Digital skills: participation in the launch event of the Digital Skills & Jobs Coalition (2016)
- The industrial application of blockchain technologies for traceability, e.g. of social and environmental conditions of work and of materials for recycling
- Cybersecurity

In addition, the EU project 'Strategic study on anticipation of changes in the European ICT sector' ran between December 2014 and October 2016.

The purpose of the project was for workers to have a clear strategic view of the sector, along a Strengths – Weaknesses – Opportunities – Threats (SWOT) framework, and to define recommendations for action. It resulted in a thorough report on the major segments of ICT in Europe, and in a set of recommendations, based on the idea of having large industrial application markets play the role of "locomotives" for the ICT supply chain. The work concluded with an estimation of the employment gains from the implementation of this strategy. It also created an opportunity to discuss the impacts of digitalisation on industrial workers, and on the internal operations of trade unions. The project led industriAll Europe to become a recognised stakeholder in this field of EU policymaking.

In November 2017, a Policy Brief was published on 'Sharing the value added of industrial Big Data fairly'. Industrial Big Data contains the know-how of industrial workers in production and maintenance. It should not be captured by digital monopolists (the likes of Google, Facebook, Microsoft, etc.) The concrete proposals made in the document were transmitted to the EU institutions at the time of the official consultation when they had maximum impact in the policymaking process.

In January 2019, a Policy Brief was published on 'Artificial Intelligence: humans must stay in command'. Artificial Intelligence, and particularly Machine Learning, elicit significant concerns for workers: permanent supervision, unexplainable decisions and deskilling. These concerns, and the proposals to mitigate them, were disseminated in conferences during the active period of EU debate on 'Ethical Artificial Intelligence'.

## Mechanical Engineering

Since the industriAll Europe Congress in 2016 the main areas of work of the Mechanical Engineering Sector Network have been:

- the potential contribution of the sector to industrialised dis-assembly for the Circular Economy;
- additive manufacturing (aka 3D printing), and its potential impact on workers and employment;
- liability in case of accidents involving robots, autonomous machines or vehicles;
- contribution to consultations on the Directives on Lifts Safety, on Outdoor Noise and on Machinery Safety, which all have a major impact on the sector;
- the consequences of digitalisation on the sector.

The Mechanical Engineering Sector Network has been involved in two major projects. Both projects addressed major issues in this sector and can be considered successful in achieving their aims.

The EU Project Sustainability, Skills and Employment in the Machine Tools & Robotics started running before Congress in December 2014 and ended after Congress in November 2016.

The purpose of the two-year project was the long-term anticipation of the social consequences of environmental sustainability policies in two small sectors chosen as test cases: machine tools and robotics. The project was undertaken in cooperation with our social partner in the metal sector (Ceemet), and two industrial associations in the machine tool (Cecimo) and robotics sectors (EUnited Robotics). The social consequences considered were the changes in skills requirements (qualitative) and in employment (quantitative).

The project identified a set of key skills that workers in these sectors need to develop, in order to be ready for the changes brought by upcoming regulation aimed at environmental sustainability. It also anticipated that the number of jobs should remain constant, or increase slightly, even though there may be a shift between companies and application fields (e.g. less machine tools for internal combustion engines, more for electric power trains). It concluded with policy recommendations to social partners and public training institutions.



In January 2016, another project, this time a Joint Social Dialogue project, on 'Working safer with construction machines' started running and ended in November 2017.

IndustriAll Europe had an observer role in this project managed jointly by our colleagues at the construction sector EFBWW, their social partner FIEC and the industrial association of manufacturers of construction machines, CECE, on the safety of construction workers interacting with machines. It resulted in a political memorandum of understanding and four fact sheets on (1) standardisation, (2) ergonomics, (3) collision avoidance and (4) site organisation. This project showed the interest in cooperation along the value chain, where workers and companies from the supplier and user side cooperate.

## Pharmaceutical

This Network focuses on the situation in the pharmaceutical sector and businesses at the national level, as well as monitoring and influencing developments concerning European public health decisions in relation to the sector. This involves ensuring that the right framework conditions and best incentives for R&D and production are put in place and implemented at both levels.

In the Network meeting in 2017, Syndex was invited to give an overview of the industry in Europe and present their recent insights into how digitalisation will affect the sector. One of the main conclusions was that in research & development and manufacturing the shift from conventional pharmaceuticals to biologics has already led to plant closures and job cuts. This is mainly due to the preference for investment in new plants over recycling equipment and investing in skills. However, research & development will be the key to future profitability, as it is a strong asset of the European economy.

As the pharmaceutical sector is very important for the development of new medicines and the fight against diseases, and at the same time facing more challenges due to an increased need for cost efficient procedures and the pressure on public expenditure, industriAll Europe has decided upon an 'Action Plan for the Future of the Network'.

The Action Plan defines challenges such as the austerity measures introduced by European governments, the rapid growth in the market and in research in emerging economies, and migration of research and development activities outside of Europe, as well as the wave of mergers and acquisitions in 2015 and 2016. The role of trade unions should be to address industrial and social challenges efficiently and thus build guidance and consensus around those issues to retain and promote decent employment.

In 2019, the Network also focused on the potential effects of Brexit on the pharmaceutical industry and on European Works Council (EWC) membership.

The Network also discussed current and expected European legislative initiatives, e.g. 'Pharmaceuticals and the Environment'. Earlier legislation set the obligation to examine the scale of the problem water and soil pollution by pharmaceutical residues. The current Communication describes three objectives: identify actions to be taken or further investigated to address the potential risks, encourage innovation where it can help to address the risks, identify remaining knowledge gaps, and present possible solutions for addressing them. These areas of action will affect the industry and industrial production in that they aim to support the development of less environmentally harmful pharmaceuticals. Other key objectives include promoting greener manufacturing, improving environmental risk assessment and its review, reducing wastage and improving waste management, and expanding environmental monitoring.

The Commission has also introduced new regulation on the production of generics and biosimilars for export. This allows exceptions to the protection provided by Supplementary Protection Certificates (SPC) for export purposes and/or stockpiling. Specifically, the new regulation allows export to a non-EU market where protection has expired or never existed and stockpiling for the EU market during the six months before the SPC expires.

The Network discussed different trade union approaches to digitalisation. One focus was the question of flexibility and remote work and the possible positive and negative effects on psychosocial stress. Continuous exchange on this is envisaged.

Organising was on the agenda of the Pharmaceutical Network for the first time. IndustriAll Europe's strategic approach was discussed, and the participants exchanged their own recent initiatives. The question of how a Sector Network can contribute to organising will remain on the agenda of future meetings.

## Shipbuilding

The Shipbuilding Network has identified the following priorities: future industrial policy for the sector (including the demand for LeaderSHIP 2030), tackling global overcapacity and unfair competition and improving trade union relations across Europe.

The European maritime technology sector is in urgent need of a new revised industrial strategy which focuses on workers. Following the release of studies commissioned by the European Commission and the Consultative Commission on Industrial Change (CCMI), industriAll Europe continued to call on the European Commission to produce a LeaderSHIP 2030 strategy as soon as possible.

IndustriAll Europe supported the CCMI in drafting their own-initiative opinion, 'The LeaderSHIP 2020 strategy as a vision for the maritime technology industry: towards an innovative,

sustainable and competitive maritime industry in 2020'. Network members also took part in the report's official hearing in 2017 and industriAll Europe gave a presentation to European policymakers on the importance of establishing a new industrial policy focused on protecting and creating jobs in Europe.

Global overcapacity and unfair competition remain the main threats to the European maritime technology industry; these were also the biggest causes of the huge crash in the European sector in 2007/2008. An international, legally binding agreement is urgently needed to create a global level playing field and industriAll Europe is continuing to work with the European Commission and individual Member States at the OECD Working Party 6 (WP6) on establishing this much-needed mechanism.

Trade union co-ordination and ensuring high levels of social standards remain of key importance. Additional meetings of the Select Working Party (SWP) have increased the level of trade union co-ordination throughout Europe and the Network has asked industriAll Europe to apply for European funding to carry out a project focused on further developing trade union co-ordination between European shipyards.

The promotion and monitoring of high social standards are priorities for the Network and are therefore discussed on a regular basis. Network members played a major role in the drafting of the ILO Code of Practice on safety and health in shipbuilding and ship repair when they took part in a week-long working group between 22- 26 January 2018. The code, adopted in 2018, sets high standards to protect workers across the globe.

IndustriAll Europe will continue to work productively with IndustriALL Global and support their campaign to end the dangerous working conditions in the international shipbreaking sector as well as their campaign on the Hong Kong convention. Establishing high levels of workers' rights around the world remains important in European trade union work.

## Textile, Clothing, Leather & Footwear

The TCLF Sector Network has been active in European and Social Dialogue projects in recent years. Since its Congress in 2016, industriAll Europe has been engaged in six different projects.

In addition to these projects, the main areas of activity for the Sector Network TCLF included responsible supply chains—founded on due diligence, transparency, traceability—and fair purchasing practices, building on work by the OECD and NGOs.

The EU project 'Textile Services' began before Congress in January 2015 and ran until November 2016. Firms in the textile services sector maintain, launder and rent textiles to professional

customers (hotels, hospitals, and industry). It is a fast-growing sector, but one where working conditions are poor. The purpose of the project was twofold: to provide workers with a clear vision of their sector and of the major trends affecting it; and to support the establishment of information & consultation institutions in four transnational companies. The project resulted in a report on the strategic situation of the sector, and its evolution, and in the start of negotiations with management of three firms to set up a European Works Council (EWC) or amend an existing one.

From January 2018 to November 2019, industriAll Europe has led an EU-funded project on strengthening trade unions in the TCLF sector in South-East Europe. The social situation of TCLF workers in South-East Europe (Croatia, Serbia, North Macedonia, Montenegro, Albania, Romania, and Bulgaria) is very bad, with a combination of low wages (often below Chinese levels), precariousness, bad working conditions, and almost no collective agreement coverage. The purpose of the project is to improve the situation of workers in these companies that are acting as suppliers to big brands. This involves supporting the organising capabilities of trade unions, promoting the setting up of sectoral collective bargaining and addressing the purchasing practices of big brands. Existing Global Framework Agreements (GFAs) in some of these brands are used as a lever to improve the conditions for workers in supplier companies. The project started by mapping the situation of trade unions and in the region's supply chains. It was followed by six national workshops to train shop stewards and trade union officials in organising techniques and GFAs. One day of the workshops included employer representatives, big brands, governments, innovation centres and NGOs discussing collective bargaining as a win-win institution.

## Defence (Ad-Hoc Network)

The defence sector is very different from all other sectors within the remit of industriAll Europe, as it is not subject to the Internal Market. As a general rule, military goods are subject to national regulation only, to national restrictions on exports (even within the EU), and not standardised at the EU level or mutually recognised between Member States.

Following the publication of a 'Global Strategy for the European Union's Foreign and Security Policy' by the European External Action Service (EEAS) in June 2016 and the growing security concerns in the EU, the Council has taken steps towards greater integration of EU Defence procurement by Member States in the form of:

1. a permanent Military Planning and Conduct Capability for the EU (independent from NATO);
2. synchronising defence procurement;
3. a Permanent Structured Cooperation (PESCO) on defence and security capability

- build-up with binding mutual commitments by Member States;
4. EU public funding for defence research & innovation, and of EU financing support for defence procurement.

These changes in demand will have consequences on the supply side, most probably towards cross-border consolidation, with a potential impact on workers. As a result, the Ad-Hoc Network, following intense discussions, applied for an EU-funded project to anticipate this impact in the five main sub-sectors (land, air, navy, command & control systems, supply chains), and to provide works councils with tools to discuss it with management. This project, if accepted by the Commission, would be implemented in the Congress period 2020-2024.

The Ad-Hoc Sector Network on defence has concentrated its activities on informing affiliates of these institutional developments, by inviting officials from the Commission and the Parliament for discussion in its meetings on the:

- European Defence Action Plan of the Commission;
- European Defence Research Programme – EDRP proposed by the Commission;
- report on the European Defence Union by the Parliament;
- European Defence Fund.

The Ad-Hoc Sector Network also held discussions on the rules governing the export of defence equipment, specifically exports to non-EU countries. The practices between Member States in this matter differ considerably, reflecting contrasted political views, as well as different levels of economic dependency of their national defence industries regarding such exports.





# **Social Dialogues**

## SD Chemicals & Pharmaceuticals

The European Social Partners, industriAll Europe and the European Chemical Employers Group (ECEG) which also covers chemicals, pharmaceuticals, rubber and plastics, have, since 2015, been working on two different projects which both form part of the Roadmap 2015-2020 of the European Research Area.

In December 2017, the mid-term results for the last three years were presented. The results contained an evaluation of the past ten years of sectoral social dialogue in the European chemical industry, as well as an evaluation of the Addendum to the Framework Agreement on competence profiles, which was signed in June 2017. Further outcomes were a joint position on social and employment-related aspects of digitalisation, as well as the 'European Framework of Action on Sustainable Employment and Career Development' and its toolbox on good practices, which collected good practices from national and European social partners in the sector in sustainable employment and career development.

The Mobility Mentoring Portal was launched, which developed out of a project on 'Stimulating Voluntary Mobility of Young Workers in the Chemical Industry in the EU' with FECCIA and ECEG.

The 2018-2019 project, 'The impact of digital transformation and innovation in the workplace: a sector specific study of the European chemical, pharmaceutical, rubber and plastics industry



Chemical social partners sign recommendations on digital transformation, November 2019.

in Europe', identifies the state of play, challenges and opportunities presented by digitalisation with respect to skills, health and safety and work organisation. A European-wide online survey was complemented by two topical conferences in 2018 and 2019. IndustriAll Europe and ECEG committed to continue working together on the subject areas and issued recommendations to their affiliated organisations on how digital transformation can be dealt with at the national, the local or the company level. A formal declaration was signed at the final project conference in The Hague in November 2019.

Several joint positions were signed, e.g. on maintaining the structures of the Scientific Committee on Occupational Exposure Limits (SCOEL) and the Risk Assessment Committee (RAC) of the European Chemicals Agency (ECHA), on Brexit, and the Revision of the Carcinogens and Mutagens Directive.

Furthermore, the social partners entered into a cooperation with VinylPlus, the voluntary sustainable development programme of the European PVC industry and the European Plastics Converters starting with a workshop on 'Health and Safety at PVC Converters and Recyclers' in 2018. The partnership is meant to enhance and perpetuate social partner activities in the plastics industries.

The potential impact of the European legislative initiative on Sustainable Finance has been on the agenda. The objective of this proposal is to reorient capital flows towards environmentally sustainable investment. It will introduce criteria to measure the sustainability of an economic activity and to make this transparent on the financial market. IndustriAll Europe and ECEG together contacted several MEPs to explain the potentially detrimental effects of a proposed taxonomy and amendments to this proposal that were suggested by members of the relevant EP Committees.

The topics industriAll Europe and ECEG have discussed range from the future of REACH and the European Chemicals Agency, to the Directive on Transparent and Predictable Working Conditions; from the new European Labour Authority to the use of Passerelle Clauses, among other issues.

At their plenary meeting in November 2019, the social partners decided on a new work programme for the coming years. While digitalisation will remain an important topic, recurring focus is placed on health and safety, lifelong learning, and attracting young people to the industry.

## SD Electricity

In the Sectoral Social Dialogue Committee (SSDC) for the electricity sector, industriAll Europe discusses the major employment challenges for the European electricity sector, together with the European Federation of Public Service Unions (EPSU) and Eurelectric, the association representing the interests of the electricity industry. In recent years discussions focused on the Energy Union strategy, the Clean Energy Package as well as the long-term strategy 'A clean planet for all'.

In this context, the SSDC adopted a statement promoting a Just Transition in the electricity sector in November 2017.

In June 2016, the SSDC signed an agreement setting a Quality Framework for Traineeships in the European Electricity Sector. With this agreement, social partners define quality working conditions for trainees and aim to prevent precarious working conditions for young workers.

One major aspect of the Just Transition is the anticipation of skills needs and the requirements for Vocational Education and Training (VET) systems. The social partners have addressed these issues through a joint project. The outcome was a report with a set of recommendations to social partners and a Social Partner Roadmap on Skills and Qualifications for the upcoming years that was adopted in October 2018. On this occasion, the electricity social partners also



'Skills2Power' project, social partner workshop, Madrid, February 2020.

signed their pledge to the European Alliance for Apprenticeships. Currently they are working on a follow-up project promoting alliances between VET providers, industry and social partners on the national level.

More recently, social partners have been negotiating a Framework of Actions on the challenges and opportunities of digitalisation for the workforce in the European electricity sector. It was adopted at the first meeting in 2020. Social partners also started discussing the possibility of negotiating a Quality Framework for Traineeships in the electricity sector. That decision also depends on the progress made within the Framework of Actions on digitalisation.

## SD Extractive Industries

The Sectoral Social Dialogue Committee Extractive Industries has further discussed the implementation of its Roadmap on Skills and Qualifications adopted in 2015. After a series of presentations on national practices related to skills and qualifications, it decided on a social dialogue project on 'Promoting Skills and Qualifications in the field of Health and Safety in the Mining Sector' to help raise health and safety provisions and standards in small and medium-sized enterprises through improved training. The project kicked off in April 2019, collecting information on current occupational safety and health (OSH) provisions in Bulgaria, the Czech Republic, Hungary, Spain and Poland in order to develop country fact sheets and provide tailor-made training materials in view of improving OSH systems.

The Committee has been closely monitoring developments in health and safety legislation, in particular the update of the Carcinogens and Mutagens Directive and the updated list of substances with Occupational Exposure Limits. Representatives of the Social Partners are also involved in the Standing Working Party Extractive Industries which is part of the Advisory Committee for Occupational Safety and Health advising the European Commission on OSH legislation.

Another key priority for the Social Dialogue Committee is the EU's industrial policy and the secure supply of raw materials to contribute to a sustainable economy.

IndustriAll Europe closely monitors and is actively involved in the discussions of the EU Platform for Coal Regions in Transition.



## SD Gas

In 2019, industriAll European Trade Union, the European Federation of Public Service Unions (EPSU) and Eurogas, representing the gas industry, relaunched their Sectoral Social Dialogue Committee (SSDC) for the gas sector. Established in 2007, the SSDC was put on hold after Eurogas withdrew in 2012.

Upon the request of some industriAll Europe and EPSU affiliates and bearing in mind the uncertainties that the workers in the sector are facing with the objective of becoming carbon neutral by 2050, the unions contacted Eurogas and the European Commission seeking to return to social dialogue. Facilitated by the change in Eurogas' leadership, the fastmoving policy developments and the fact that the social dialogue committee technically still existed, the Commission supported the reestablishment.

The first plenary meeting drew more than 50 participants with good participation from the employers. One of the first activities of this committee will be a study on future skills requirements in the sector in view of decarbonisation. Moreover, the study will also include updated employment figures for the sector, as data for the EU level is not available.

The committee will discuss the future role of gas in the EU's long-term strategy to become carbon neutral (European Green Deal) and the gas package, expected in 2020. It will also work on its understanding of a Just Transition for the workforce in the sector.

## SD MET

The Sectoral Social Dialogue Committee (SSDC) in the metal, engineering and technology-based industries (MET) is made up of two ad-hoc groups: the Competitiveness & Employment ad-hoc group and the Education & Training ad-hoc group. Both meet separately once a year and then meet together for the SSDC plenary session.

The Competitiveness & Employment ad-hoc group has been working on the impact of digitalisation in the MET industries.

In December 2016, the plenary of the MET SSDC adopted a joint position on the impact of digitalisation on the world of work in the metal, engineering and technology-based industries. This position paper highlights that digitalisation is an important area for social dialogue and an opportunity to shape the ongoing technological change, to maximise the benefit for our industry in terms of growth and jobs. This document is a starting point for discussion and sets a preliminary vision of what issues may present themselves to the MET sector and to MET social partners.

In the Competitiveness & Employment ad-hoc group, the following issues are so far under discussion:

- what issues could be raised from intensified monitoring of production through digitalisation?
- what implications do we see from being able to work remotely and at any time, in terms of work organisation, working time and health & safety?
- what will be the impact of automation on competitiveness and employment in the MET sector?
- what design can we jointly recommend for public/EU initiatives supporting digitalisation of SME?

The Education & Training ad-hoc group has been actively deepening and further promoting a shared vision of the skills challenge in the MET industries.

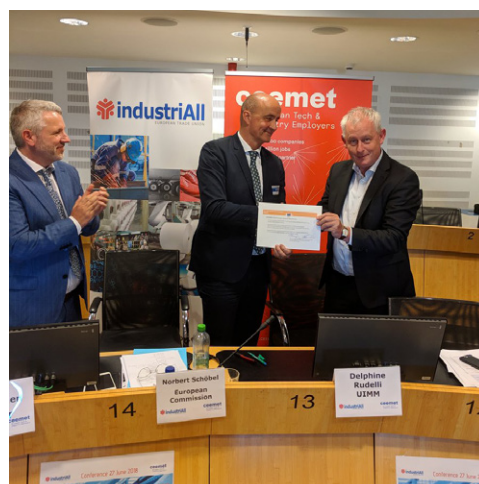
In 2017, industriAll Europe and Ceemet adopted a joint position: 'A Skills Agenda for Europe: no need for New but for Swift actions', which was promoted at a joint public event in the European Parliament (EP dinner debate 'Meeting the skills challenges of the MET industries' on 21 June 2017)

In 2018, industriAll Europe and Ceemet signed a joint pledge on apprenticeships as part of the European Alliance for Apprenticeship, on the occasion of a joint public event in the Committee of the Regions (CoR conference 'Future of work in the MET industries: stepping up vocational education & training!' on 28 June 2018).

In 2019, discussions kicked off on a forthcoming joint position focusing on lifelong education and training (expected in 2020). Seizing the opportunity of a new European Parliament and European Commission, industriAll Europe and Ceemet drew up in a single document the joint demands we have been defending for the past years in the area of skills, education and training. This document served as a basis for lobbying activities and meetings with Members of the European Parliament.

Furthermore, in December 2018, the MET SSDC adopted two joint positions on:

- the integration of refugees into the labour market;
- a joint position on the European Pillar of Social Rights (EPSR).



Luc Triangle, industriAll Europe, and Uwe Combüchen, CEEMET, sign social dialogue pledge on apprenticeships, June 2018.

## SD NEPSI (European Network on Silica)

In 2017, the revision of the Carcinogens and Mutagens Directive at work (CMD) led to the adoption of a binding limit value of 0.1 mg/m<sup>3</sup> for respirable crystalline silica dust. IndustriAll Europe managed to secure the recognition of the NEPSI Social Dialogue Agreement as a valuable and necessary tool to support the implementation of the CMD in a Recital of Directive 2017/2398. In the second revision of the CMD in 2019, we successfully lobbied for the integration of an article which secures that Social Partner agreements concluded in the remit of the Directive will be listed on the website of the European Agency for Safety and Health at Work (EU-OSHA). DG EMPL confirmed that the NEPSI agreement will be the first on the list and will be the benchmark for any future Social Dialogue Agreements on this list in the future.

Finally, NEPSI signatories have also agreed on a 'Roadmap on the future of NEPSI' including special training programmes for new workers, a complete update of the good practices, and a harmonised protocol for exposure measurement. The NEPSI signatories received an EU grant to implement this roadmap.

## SD Paper

In November 2016, the Sectoral Social Dialogue Committee (SSDC) in the paper sector led a project on future skills requirements in the European pulp and paper sector. The project observed education systems in eight countries and studied whether they deliver the skills that the pulp and paper sector requires. The outcome was a set of policy recommendations to policymakers published in a project brochure.

Following up on the project, CEPI, the Confederation of European Paper Industries, and industriAll Europe have decided to apply jointly for the funding of a follow-up project addressing the appeal of the paper sector to young people.

In July 2018, the SSDC adopted a resolution on the impact of digitalisation on employment in the pulp and paper sector. The social partners committed to follow up by collecting good practices.

Following the publication of the updated EU Bioeconomy Strategy in 2018 and a dedicated workshop on the bioeconomy in July 2019, the social partners signed a joint statement on 'The circular bioeconomy: an opportunity for Europe's growth and jobs' in October 2019. The potential of the bioeconomy to contribute to reaching carbon neutrality and innovation and skills requirements will remain an important subject for discussion.

Both industriAll Europe and CEPI are also involved in the work of the Forest-Based Industries Expert Group (F-BI) convened by DG GROW. In recent years discussions focused on the Circular Economy Action Plan and guidance addressing the cascading use of woody biomass. More recently, the F-BI has launched its vision for 2050 outlining the role of the forest-based industries in strengthening the European low-carbon circular bioeconomy.

## SD Shipbuilding

Fresh impetus was given to the Sectoral Social Dialogue Committee (SSDC) for Shipbuilding at the start of the Congress period. The members of both the SSDC and the Select Working Party (SWP) that supports the preparation of the joint meetings, reassessed working methods and renewed their commitment to social dialogue. A new Joint Work Programme was agreed in 2017 and 2019, listing concrete actions of importance for trade unions.

The SSDC meetings were given a thematic focus, addressing themes such as globalisation, industrial policy and social policy. European and international experts, including from the OECD and ILO, have been invited to the meetings.



Workshop of the 'Upskilling Shipbuilding Workforce in Europe' project, Cadiz, December 2019.

IndustriAll Europe and Sea Europe, representing maritime civil and naval industries, have been working together to promote vis-à-vis EU policymakers the importance of the sector for the EU's economy, European jobs and the regions dependent on the industry. The social partners drafted a joint letter to European policymakers in July 2018, highlighting the strategic importance of the sector. This follows a previous joint letter to the Commission on the need to fully implement LeaderSHIP 2020, sent in February 2016.

Increased joint lobbying by the social partners of the European Parliament has resulted in a written question to the European Parliament by a MEP on the future industrial policy of the sector: Maritime technology industries and the LeaderSHIP 2020 initiative (May 2018). Following this, a high-level event took place in October 2018 at the European Parliament with various MEPs, Commission representatives, experts and the social partners.

At the plenary meeting in 2019, the social partners published their joint manifesto 'Maritime Technology: A Strategic Sector for Europe' which was well received by the EU institutions. This paper listed clear demands for the industry and its workers and was used to lobby the EU institutions and Member States to take urgent action to protect the future of the industry and the thousands of jobs that rely on the sector.

Skills remains an important topic. Not only in terms of attracting people to the sector with the right skills, but also for identifying the skills gaps in the sector and mechanisms to improve the recognition of skills and to upskill current workers in response to the changes posed by Industry 4.0. The social partners were granted EU funding to undertake their 'Upskilling Shipbuilding Workforce in Europe' project over two years. The project is developing well. Two successful workshops took place in 2019, a further workshop, a final conference and published results are expected by the end of 2020.

The social partners have remained focused on improving the image of the sector and various activities are planned each year to celebrate European Maritime Week.

## SD Steel

The Sectoral Social Dialogue Committee (SSDC) for Steel that brings together industriAll Europe and the European steel association Eurofer, continues to have productive meetings resulting in agreed joint actions. A renewed Joint Work Programme was agreed in 2017 and 2019, listing concrete actions of importance for trade unions including global overcapacity, decarbonisation of the sector, skills and future industrial policy.

IndustriAll Europe lobbied EU policymakers on several important issues for the European steel industry and its workers. Together with Eurofer, industriAll Europe co-signed the European



Industrial Manifesto for Free and Fair Trade (February 2016). The social partners also sent a joint letter to Trade Commissioner Malmström demanding Indonesia be included in the list of developing countries in the EU safeguard measures to prevent the huge increase in cheap stainless steel on the EU market (which was driving down European prices).

The decarbonisation of the sector remains a big threat to the future of the industry and risks European jobs. A joint position was released (Review of the EU ETS post 2020: reconciling climate ambition with industry's competitiveness and employment) in 2016 and the social partners continue to play an active role in the European Commission's High-Level Group for Energy-Intensive Industries. The social partners are working together on concrete demands to level the global playing field via carbon adjustment measures which have been identified as a priority of the new European Commission.

IndustriAll Europe played an active role in Eurofer's EU Steel Day in 2018 and 2019. This enabled industriAll Europe to take part in the President's debate and raise demands directly to the Vice-President of the Commission and the Chair of the Industry Committee in the European Parliament. Increasing the voice of the trade unions in European debates on the future of the steel sector remains a priority.

The social partners remain focused on ensuring high-quality working conditions in the sector. Skills remains an important topic and industriAll Europe supported the joint application for the European Commission's Blueprint Skills Project (4-year project worth €4 million) for the steel sector. This project is now underway and trade unions have a strong voice in the project.

## SD TCLF

Social dialogue projects made up a large portion of industriAll Europe's work in the textile, clothing, leather and footwear (TCLF) sector.

The project 'Strengthening European Social Dialogue in the Textile & Clothing sector' ran from January 2016 to June 2017 and aimed to strengthen the capacity and willingness of national social partners in the textile & clothing sector to participate in EU social dialogue. It consisted of a strategic analysis of the sector's industrial situation, based on statistical data, and of the state of social dialogue. A series of eight high-level national meetings with social partners were concluded with a final conference.

From June 2015 to June 2019, industriAll Europe participated in two successive social dialogue projects on an online tool for the evaluation of the risk related to Corporate Social Responsibility (CSR) incurred by SMEs in the Textile & Clothing sector. The evaluation is based on the relationship of these SMEs with their immediate suppliers, and on the geographic location of



National seminar in Romania, January 2019, TCLF project in South-East Europe.

these suppliers. The projects aimed to finalise the technical development of this tool, validate it with real users and with NGOs running ethical trade certification schemes, and convince SMEs to use it.

Two successive social dialogue projects are addressing the issue of attracting young workers to the footwear sector. Running from March 2017 to December 2020, the projects aim to improve the image of the footwear industry among high school students. They combine (1) the introduction of mentoring in companies, (2) the dissemination of technical innovation, (3) improvements to apprenticeships and (4) communication (creation of a video clip, presence in four trade fairs, and two successive EU-wide competitions to create a new product or an ideal workplace).

The Digital TCLF project ran from January 2017 to February 2019. The project quantified the needs of nine emerging digital professions in the textile, clothing, leather and footwear industries. It also defined the changes necessary for Vocational Education & Training (VET), so they offer the right skills for the sector in the future. Finally, the project identified an innovative means of recognising these new qualifications at EU level.



# **Horizontal Working Groups**

## Equal Opportunities

The industriAll Europe Congress, held in June 2016 in Madrid, decided that the Equal Opportunities Working Group would become a permanent Working Group. Since then, the equality and anti-discrimination dimension has been integrated into a Political Resolution and industriAll Europe's Political Priorities, while several meetings took place to work on the implementation of those priorities.

The main focus of the first meeting after the Congress, which was held in November 2016, was to identify the political issues that would set the group's future work. The Action Plan 'Equal Opportunities for Equal Rights' was adopted at the Executive Committee on 13 December 2017. It aims to promote equal rights for all people in the workforce, the labour market and in society as a whole. During this congress period, the Working Group focussed on gender, LGBTIQ and persons with disabilities.

The position paper 'For a fair digitalisation – close the gender gap!' describes the gender-specific challenges and opportunities of the digital transformation. It was adopted by the Executive Committee in November 2018.



Equal Opportunities Network says 'Stop Violence Against Women', November 2019.



A Select Working Party (SWP) has elaborated, together with members of the Company Policy Committee, guidelines for European Works Councils (EWCs) on how to approach equal opportunities. They describe potential topics for discussions with the management and/or human resources, such as recruitment policies, access to training, the impact of restructuring measures on different groups of employees, and means and structures to deal with harassment, etc.

A members' area on the industriAll Europe website allows affiliates to share good examples (e.g. agreements, initiative training agendas, etc.)

The Working Group had an in-depth exchange of trade-union activities on LGBTIQ, and on potential joint actions at the European level.

The Secretariat has also taken part in European Commission conferences and hearings on gender pay gap and pay transparency, LGBTIQ equality and trade-union practices on non-discrimination and diversity.

Developments in the Work-Life-Balance Directive were closely followed and industriAll Europe participated in the hearing at the European Parliament on 21 February 2018. IndustriAll Europe supported the ETUC's media campaign, using the hashtag #IWantWorkLifeBalance.

IndustriAll Europe was a steering group member of the ETUC's REBALANCE project. This EU-funded project focused on 'Trade unions' and social partners' actions to improve reconciliation of work, family and private life for women and men'.

## Youth

At its 2016 Congress, industriAll Europe set up a permanent Youth Working Group tasked with discussing subjects related to the specific situation of young workers in the metals, chemicals and textiles industries. The Youth Working Group is composed of youth representatives nominated by affiliated trade unions.

IndustriAll Europe's Youth Working Group focused its work on tackling the staggeringly high levels of youth unemployment in Europe - which in some regions have reached up to 50% - and the rise in precarious working conditions, which has increased sharply in the aftermath of the global economic crisis.

In cooperation with the Friedrich Ebert Stiftung, a 'Youth Seminar 4.0' has held in Bratislava between 15-17 May 2017. At the seminar, the first position paper of industriAll Europe's Youth Working Group, 'Shaping the Future of Youth', was adopted. The position paper sets out analysis and demands related to four areas, which have particularly affected the conditions of





IndustriAll Europe's Youth Working Group contributed to the ILO/ETUC European Youth Empowerment Conference in December 2019.

employment for young people in Europe: digitalisation & innovation, flexibility, internships/ apprenticeships and mobility.

As agreed at Congress, a meeting of the Youth Working Group has taken place each year: on 16 November 2016, 27 March 2017, 27 March 2018 and 5 March 2019. These meetings give the members of the working group a chance to network, to take stock of the issues facing young workers and trade union activists across Europe and to shape the agenda for the coming year.

In May 2018, members of the Youth Working Group featured prominently in the ETUC's Workplace Week campaign for a pay rise across Europe. Colleagues from North, South, East and West outlined the issues facing young workers in their sectors, companies and countries and explained why young European workers need a pay rise.

Ahead of the European Parliament elections in 2019, the Youth Working Group met on 7-8 November 2018 in Zagreb, Croatia. This was the first meeting organised as part of a series that industriAll Europe and the Friedrich Ebert Foundation (FES) launched in the run up to the 2020 Congress. This first seminar focused on tackling megatrends which threaten our society, and which have a particularly negative impact on young workers, such as digitalisation, globalisation, decarbonisation and the transition to a green economy, but also the rise of populist parties.

In view of the European elections in May 2019, the Youth Working Group elaborated a Youth Manifesto that outlined the 'Demands of Young European Workers for the European Elections 2019.' The Youth Manifesto has been promoted by the Secretariat and by the members of the Youth Working Group who met with young MEP candidates to put forward their demands. Over 10,000 people have seen our Youth Manifesto on social media and about 400 people have liked or shared it, including MEP candidates and the European Youth Forum.

In 2019, the Youth Working Group authored on a new document 'Unprecedented Challenges in Shaping Our Future' that outlines the priorities for industriAll Europe's youth work: fighting racism, populism and right-wing extremism by promoting our own values; improving the quality of our work through organising and collective bargaining; tackling climate change and its impact on jobs; shaping the impact of digitalisation on jobs; education and training; democracy in the workplace; defending youth representation systems at company level. The document was adopted by the Executive Committee at its meeting on 16-17 May 2019.

The first priority of 'Fighting racism, populism and right-wing extremism' was addressed during the FES Seminar in Zagreb in 2018 and during the activities to promote the Youth Manifesto ahead of the 2019 European elections. This was followed by activities around the next priority, namely 'Improving the quality of our work through organising and collective bargaining'. Between 18-20 September 2019, industriAll Europe organised a seminar on 'Building Trade Union Power and Organising Young Workers' in cooperation with the ETUI in Budapest, Hungary. This was an action-oriented capacity building training session, aimed at supporting young unionists in their activities.

Between 30-31 October 2019 in Belgrade, Serbia, industriAll Europe and FES organised the second seminar in the series. It focused on 'Improving the quality of work for young workers and apprentices through collective bargaining.' The focus on collective bargaining was particularly relevant given the ongoing industriAll Europe 'Together at Work' campaign to promote collective bargaining across Europe. The young participants at the seminar were able to develop a deeper understanding of how collective bargaining works in different European regions and countries and to learn from each other by sharing best practices. They were also able to prepare for an active engagement in the campaign, particularly in the context of the Young Workers month in January 2020 that focused on the benefits of collective bargaining for young workers. The Youth Working Group also drafted a document stating the industriAll Europe youth's position on collective bargaining.

IndustriAll Europe actively contributed to the ETUC's project 'Getting Young Workers on Board of the European Pillar of Social Rights' that runs in 2019-2020. The aim of this EU-funded project is to identify good practices by the national trade unions and create a toolbox for mainstreaming a youth approach to collective bargaining, social dialogue and strategic approaches of trade unions throughout Europe. Based on the results of the survey, the ETUC Youth Committee will

put forward a pan-European strategy on collective bargaining for the identified sub-groups. During the first phase of the project, a survey on collective bargaining and social dialogue practices, including specific clauses appertaining to young workers, was carried out among affiliates. During the second phase, three regional workshops are planned across Europe. The first one took place between 24-25 October 2019 in Frankfurt Main, Germany, and the remaining two workshops are to take place in 2020 in Romania and France.

Lastly, industriAll Europe is in the process of developing a project in cooperation with the ILO ACTRAV on 'Strengthening Young Workers' Voices for the Future of EU Industry'. The project is planned for 2020 and envisions a training and knowledge-sharing programme which aims to strengthen young members' capacity to tackle the challenges posed by digitalisation, decarbonisation and the energy transition. Through this project, industriAll Europe is addressing two other priorities identified by the Youth Working Group, specifically 'Shaping the impact of digitalisation on jobs' and 'Tackling climate change and its impact on jobs.'

## White Collar

The purpose and status of the White-Collar Working Group has been updated following the Congress of industriAll Europe in 2016.

In its new format, the White-Collar Working Group has agreed its work plan with the following items:

1. Organising white-collar workers in industry
2. Specific aspects of digitalisation of industry
  - a. Crowd and platform work
  - b. (Automated) Processing of worker-related data
  - c. Work-life balance and working time
  - d. Impact of digitalisation on employment and work (beyond platform work)
3. Participation in existing campaigns
  - a. 'Equal pay for equal work' campaign
  - b. Whistleblowing campaign

The White-Collar Working Group has started to implement this plan.

### Organising white-collar workers in industry

The working group has designed a plan to support organising white-collar workers in industriAll Europe's affiliates. It contains the following headings:

- common online survey;
- integrating the individual career paths of white-collar workers in industry in the organising strategy;
- targeting students and trainees as future white-collar workers.

### **Crowd and platform work**

A survey of members of the White-Collar Working Group and of the Collective Bargaining & Social Policy Committee identified the types of crowd and platform work that are most common in industry. The survey shows that tasks in industrial research & innovation were most susceptible to out-sourcing on crowd-working platforms, because they are project-based and can be performed remotely.

### **(Automated) Processing of worker-related data**

A survey among the members of the White-Collar Working Group identified the types of data being collected on workers in industry. The survey found that a part of automated data collection and processing applies to blue-collar workers. The usage of 'employee assessment' software, based on machine learning, was, however, found to be specific to white-collar workers. The exact impact of the recently enforced General Data Protection Regulation needs to be assessed.

### **Work-life balance and working time**

The White-Collar Working Group discussed how the 'right to disconnect' is implemented in Member States and how effective this implementation is.

### **Whistleblower campaign**

The White-Collar Working Group closely monitored, in liaison with the Council of European Professional and Managerial Staff (Eurocadres), the developments that led to the adoption in April 2019 of the Whistleblowers' Protection Directive.

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