

INTERNATIONAL LABOUR ORGANIZATION
Sectoral Activities Programme

Note on the proceedings

**Tripartite Meeting to Examine the Impact of
Global Food Chains on Employment**

Geneva, 24–27 September 2007

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Introduction

The Tripartite Meeting to Examine the Impact of Global Food Chains on Employment was held at the ILO in Geneva from 24–27 September 2007. The Office had prepared an issues paper¹ in English, French and Spanish to serve as a basis for the Meeting's deliberations. The paper had focused on the following themes: the global value chain; product trends; structure and composition of the food-processing industry; food distribution and retailing sectors; the impact on employment and working conditions; the number and content of jobs; and the impact on industrial relations.

The Governing Body had designated Mr Julio Rosales, Government member of the Governing Body, to represent it and to chair the Meeting. The three Vice-Chairpersons elected by the Meeting were: Mr K.J. Moleme from the Government group; Mr Hab'lyalemye from the Employers' group and Mr Morcillo from the Workers' group.

The Meeting was attended by Government representatives from the following 24 member States: Angola, Argentina, Austria, Brazil, China, France, Gabon, Islamic Republic of Iran, Italy, Japan, Malaysia, Mali, Nigeria, Philippines, Poland, Portugal, Qatar, Singapore, South Africa, Spain, Thailand, Turkey, Bolivarian Republic of Venezuela, Zimbabwe, as well as 16 Employer and 17 Worker representatives.

Observers from the Food and Agriculture Organization of the United Nations (FAO) and the International Trade Centre/United Nations Conference for Trade and Development (UNCTAD) attended the Meeting, and representatives from the following non-governmental organizations also attended as observers: the International Trade Union Confederation (ITUC); the International Organisation of Employers (IOE); the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF); Union Network International (UNI); and the World Federation of Trade Unions (WFTU).

The three groups elected their Officers as follows:

Government group

Chairperson: Ms V.A. Eastwood (Philippines)

Employers' group

Chairperson: Mr D. Brown

Secretary: Mr J. Dejardin (IOE)

Workers' group

Chairperson: Mr K. Schroeter

Secretary: Ms J. Baroncini (IUF)

¹ *The impact of global food chains on employment in the food and drink sector*, issues paper, TMFCE/2007, Geneva, S.A.P., ILO, 2007, 28 pp.

The Secretary-General of the Meeting was Ms J. Walgrave, Director, Social Dialogue, Labour Law, Labour Administration, and Sectoral Activities Department and Officer-in-Charge of the ILO's Social Dialogue Sector. The Deputy Secretary-General was Ms E. Tinoco, Chief of the Sectoral Activities Branch.

The Meeting held seven plenary sessions.

Opening speeches

Mr Rosales, Chairperson of the Meeting, cordially welcomed the participants, recalling that since 1963, six meetings had been held to examine themes in the sector under consideration. The 1998 Meeting had focused on the topic "Technology and employment in the food and drink industries". The input of experts, together with the issues raised in the background paper, provided substance around which such meetings developed guidelines for the ILO and its constituents to shape future programmes in the sector. Internationally, urbanization was driving the market for processed food products in a "cash rich but time poor" society. At the same time, countries where agriculture and commodities had been the mainstay of their export trade were now adding value to such products with processed goods and a surge of employment opportunities. As Tolstoy's saying went: "Describe your village and you describe the world." In the wake of its economic crisis, Argentina, the speaker's own country, had learnt that the most vital characteristic of an integrated development model was the linkage between macroeconomic policies on the one hand and social and labour policies on the other, targeting quality jobs. In the 1990s, although the food and drink industry in Argentina had been the main avenue of foreign direct investment, the productivity growth achieved in the sector as a result had been accompanied by a high cost in the form of a decline in employment, followed by a downturn in the 2001–02 period and further job losses. However, the industry not only peaked again in 2003 to pre-recession levels, but that upward curve meant more jobs and better pay. By 2006, employment in the industry had reached a record level with 14 per cent more jobs over 1994, owing to policies where jobs were computed as a development rather than a cost factor.

Similarly, within a social dialogue thrust, Argentina had assigned high priority to lifelong training and skills development in all sectors of the economy – more than 30 registered collective bargaining agreements, many related to training, had been signed in the food and drink industry alone, a testimony to the worth of social dialogue by the signatories. The result was the formulation by the social partners of an integrated development strategy for the sector from which all parties stood to benefit. The Chairperson recalled that the Governing Body of the ILO had decided that the purpose of the Meeting was to examine the impact of global food chains on employment in the food and drink sector. To achieve that end, the Meeting needed to focus on practical suggestions which could guide the ILO to shape short-, medium- and long-term plans to respond effectively to the issues raised. The Chairperson invited a consensual approach to the challenges which faced the sector at the enterprise, national and international level.

The Secretary-General of the Meeting, Ms Walgrave, recalled the large numbers of workers employed in global food chains, citing 22 million registered in the food and drink industry alone. The large numbers employed in catering and agriculture also constituted a window of opportunity to create decent work and achieve the Millennium Development Goals (MDGs). Connecting workers in the agriculture sector with export markets in such a way that agricultural workers benefited would also determine whether food chains could create decent work and help fight poverty. Since lead firms exerted enormous control over supply companies, the ILO was pooling research to gauge how such downward pressure on suppliers within a supply chain could affect respect for workers' rights. Such knowledge was essential in fulfilling the ILO's core mandate which was to promote respect among

ILO member States, not only for the application of the ILO Declaration on Fundamental Principles and Rights at Work, but for promoting the rights of workers as enshrined in the ILO's core labour standards. Similarly, in pursuit of coherence between national policy objectives and economic power, it was essential that models of good practice be disseminated. To achieve those ends, the ILO had set up an InFocus Initiative on corporate social responsibility to examine how enterprises, within their supply chains, could give effect to the ILO's Tripartite Declaration of Principles concerning Multinational Enterprises and Social Policy. Ms Walgrave urged consensus as the key principle of the Meeting's deliberations to ensure a sound set of conclusions.

Part 1

Consideration of the agenda item

Report of the discussion

Introduction

1. The Meeting examined the item on the agenda by way of five thematic discussions on the topic. In accordance with the provisions of article 7 of the *Standing Orders for sectoral meetings*, the Officers presided in turn over the discussion.
2. The Employer spokesperson was Mr Davey and the Worker spokesperson was Mr Schroeter. The Meeting held five sittings to discuss the agenda item.

Composition of the Working Party

3. At its fifth sitting, in accordance with the provisions of article 13, paragraph 2, of the *Standing Orders*, the Meeting set up a Working Party to develop draft conclusions reflecting the views expressed in the course of the Meeting's discussion of the report. The Working Party, presided over by the Government Vice-Chairperson, Mr Moleme, was composed of the following members:

Government members

<i>Angola:</i>	Mr Baptista
<i>Brazil:</i>	Ms Phillips Ligiero
<i>China:</i>	Mr Rong Sikai
<i>France:</i>	Mr Mazery
<i>Islamic Republic of Iran:</i>	Mr Shahmir

Employer members

Mr Andritzky
Mr Bou Nader
Mr Brown
Mr Davey
Mr Montero

Worker members

Ms Desiano
Mr Nilsson
Mr Pedraza
Mr Schroeter
Mr Spaulding

Presentation of the issues paper and general discussion

Presentation of the issues paper

4. The issues paper prepared for the Meeting was introduced by an ILO consultant, who indicated that the food and drink (F&D) processing industry represented 4 per cent of GDP and employed some 22 million people. Global food chains (GFCs) sourced, processed, preserved and packaged F&D products; they took charge of research and design as well as marketing. Mergers and acquisitions were common among food companies, consolidating their position in food chains in a process where added value was no longer derived only from the physical product but increasingly from intangible knowledge and information. Low added value characterized upstream products, and downstream operations captured higher value added. GFCs were now demand led, with products tailored to consumer specifications right from the beginning. The lead firms – food processing companies, large food retailers, fast-food chains and even private equity firms – selected participating companies and took decisions on risks, rewards and sharing of value added within the chain. Such firms monitored consumer demand via information technology (IT); influenced consumer preference through marketing and brand development, research and development; and were also involved in logistics; and implementation of formal quality standards. More and more food was being processed in developing countries and Central and Eastern European countries for marketing as brand-name products. The result was either a rise in casual employment accompanied by depressed wages, or more integrated operations of food processing companies into existing collective bargaining structures and within a framework where international labour standards were applied. Worldwide, industrialization of agriculture meant that there were fewer workers on the land, but an increasing number of migrant workers were being employed in agriculture. Food processing enterprises in export processing zones (EPZs) also employed many workers in a wide range of countries.
5. Employment in GFCs could be depicted as a pyramid with a small proportion of permanent workers at the top and the largest numbers, consisting of casual workers at the base, with a wide spectrum of temporary, seasonal and contract workers in between. Social partnerships in the industry included collective bargaining agreements (CBAs) and international framework agreements (IFAs). Industry standards were meant to guarantee traceability and food safety, quality assurance and minimum labour standards as contained in the UN Global Compact, the ILO *Tripartite Declaration concerning Multinational Enterprises and Social Policy*,¹ the OECD Guidelines² and SA 8000.³ The F&D industries needed to monitor trends such as the growth of convenience and prestige foods; consumer responses to fair trade and alternative GFCs; growing concern over food safety; consumer reaction in some countries against global sourcing; and food shortages.

¹ Geneva, ILO, 1977, as amended 2006.

² The OECD Declaration and decisions on international investment and multinational enterprises: Basic texts (15 Nov. 2000).

³ The international standard for decent working conditions developed under the auspices of Social Accountability International.

General discussion

6. The Employer spokesperson welcomed the opportunity for a constructive discussion on labour issues in the F&D industries arising from the operation of GFCs. The Employers' group was diverse, with delegates representing multinational enterprises (MNEs) and many much smaller businesses. He considered that the issues paper did not fully reflect all the benefits that GFCs offered to workers in the F&D manufacturing sector, although it did refer to instances of good practice. Many jobs in the sector were atypical, representing good entry-level and other employment opportunities. Employers in the F&D industry needed to remain competitive in a largely free-market global economy via innovative and efficient methods as well as greater skill levels. Similarly, F&D processing companies needed to apply ever higher trade, certification and traceability standards. The Employers considered it inappropriate to address labour and social issues in the agricultural, retail or fast-food sectors, or in the fresh fruit and vegetable sector, within the current Tripartite Meeting. In order to thrive, the industry needed stable governments, open economies, business-friendly regulatory regimes, good basic education, appropriate labour standards and support for small businesses. The industry was a wellspring of new jobs across the globe. As for a global regulatory regime, it was neither practicable nor achievable. The speaker argued that the Meeting should concentrate on how each party could assist the industry in managing the workplace impact of GFCs in a socially responsible way.

7. The Worker spokesperson highlighted that the topic of the Meeting was GFCs as a whole, not adopting the restrictive scope suggested by the Employers. The Workers signalled that the pyramidal employment structure presented on page 22 of the issues paper (adapted from the horticultural sector) was not an accurate representation of the situation in GFCs. Similarly, a major omission was the lack of any reference to the ILO Employment Relationship Recommendation, 2006 (No. 198), which was essential to the analysis of social and labour issues in GFCs. The status of collective agreements in the industry was far from satisfactory, as no doubt co-workers from South America would testify. There was a very high degree of concentration, in the wheat, coffee, banana and cocoa segments, in which a few global companies were the dominant players. The Workers, for their part, sought cooperation based on stable structures linking MNEs and local production. The Workers held the view, first, that MNE investment projects should only be endorsed if they respected international labour standards and the needs of the local community; and, second, that export-oriented food production could not provide a basis for long-term development – already three-quarters of the world's water supply was consumed for agriculture alone. It was essential that the Meeting examined opportunities for IFAs in the F&D sector. The speaker added that the influence of private equity investors on the F&D industry was increasing as were their profit requirements. Food and drink companies were by no means a social set-up to provide jobs to people, and yet if enterprises did not participate in shaping employment policies they could not be sustainable. The Workers considered that only quality jobs would ensure sustainable and sufficient food production.

Theme 1: How are recent trends in employment in the F&D processing sector influenced by the growth and development of GFCs?

8. A representative of the International Labour Office highlighted some of the factors driving growth and development in F&D processing. There had been a 7 per cent annual increase in expenditure on food and drink in the past six years. The OECD had forecast that food prices would rise between 20–50 per cent over the next decade. The increases in global food expenditure were occurring despite the fact that food prices were, in many countries, either tightly controlled or had actually fallen in real terms. Another factor behind the continuing growth in F&D processing was increased demand for processed and convenience foods, especially in industrialized countries, where there was a growing trend towards single-parent families, higher female participation in the workforce and an ageing

population, all of which led to greater demand for processed foods. Consumers and global retailers were also driving a growing demand for “out of season” produce, which was creating jobs. Many global F&D processors were redistributing their operations around the world in order to locate facilities closer to their primary products; to expand into emerging high-growth markets; and to take advantage of lower production costs.

9. Not surprisingly, there was a growing global redistribution of employment in F&D processing, with a shift from industrialized to developing countries. There was little doubt that GFCs were increasingly influenced by the growing power of global players in agri-industry, F&D processing, catering, and F&D retailing. Some of the largest firms in the world could be found at each stage of the chain, from upstream to downstream. Continuing international expansion and consolidation through merger and acquisition activity meant that the trend towards even larger MNEs would persist. Within the F&D manufacturing stage, large global players were responsible for a rising proportion of the 22 million jobs in the sector. Together, the top ten F&D processors, top ten retailers and top ten fast-food companies accounted for about 10 million jobs. The meat packing industry in the United States provided an excellent example of the trend towards consolidation. By 2000, 13 American packing houses processed 70 per cent of the country’s beef. Food retailing demonstrated similar trends. In summary, the general employment trends were: the increasing influence of supermarkets and fast-food chains on GFCs; rising competitive pressures pushing down labour costs and employment; global redistribution of a diminishing number of food-processing jobs as multinational manufacturers transferred an increasing number of operations to lower-cost countries and invested in labour-saving technologies; and job gains in developing countries and some emerging economies as rising incomes drove greater demand for processed food and drinks.
10. An Employer member from Germany made a presentation to open the discussion from the Employers’ point of view. He observed at the outset that a large majority of workers were employed by small and medium-sized enterprises (SMEs), not by MNEs. There were indeed 22 million employees in the sector, but only around 1.26 million of these were employed in MNEs, representing less than 6 per cent. In the F&D industry, developments were not always of benefit to MNEs, which had been reducing their range of products and number of employees during the past ten years. Two mega-trends were missing in the ILO analysis. The first was that prices for agricultural goods were predicted to increase because there were more consumers for high-value products and energy costs in processing were rising. Retailer discounting was also increasing, putting producers under further pressure. In retailing, the focus of consideration regarding the food chain was food safety rather than employment conditions, with MNEs setting standards on this issue. Working conditions inside the food chain were completely different from those in industry in general; and globalization itself had an impact on employment and working conditions. More and more customers were becoming used to foreign products and demanding them. Owing to the influence of international standards like ISO, EUROPEGAP (GLOBALGAP), ISF, retailers could buy food products from all over the world without running higher risks, and the transport of food products was becoming cheaper. New plants in transition economies and developing countries also tended to have higher productivity compared with those in industrialized economies. Therefore, the global trade in food products was expected to increase. Labour costs were becoming one of the dominant factors in F&D companies’ cost of production.
11. A Worker member from France made a presentation to open the discussion from the Workers’ point of view. She stressed the consequences of industrial relocation and the impact of globalization on working conditions in the F&D distribution sector. The push to decrease costs affects labour disproportionately, leading to a loss of employment, precarious contracts, especially for women, and to outsourcing. Trade union rights were not respected everywhere and workers were losing their status and benefits. Deskilling was resulting from automation, leading to lower working conditions, low pay and work

intensification. Fewer staff were being employed although working hours were being extended, including work on Sundays. Not surprisingly, in France, accidents in the F&D distribution sector were now higher than in the chemical or the construction industry. Competitiveness, flexibility and productivity resulted in less decent work and globalization was eroding fundamental rights.

12. The representative of the Government of the Islamic Republic of Iran introduced the discussion on behalf of the Government group. He summarized the Government group's discussion and underlined the concern of some governments on worker and food safety. There was a need for tripartite collaboration on this issue. Governments were especially concerned with the reinforcement of safety standards on work with pesticides, herbicides and hormones. The nutritional effect and the development in food technology had also been discussed, as had been the need for a common policy on food safety.
13. The Employer spokesperson explained that employment trends were difficult to discuss as figures were not clear and information was anecdotal. Employment trends were influenced by the GFC but also by all sorts of other factors. MNEs provided new jobs and did not need international codes because their standards were already very high. On the issue of outsourcing, he questioned whether it was necessarily a bad thing to move jobs and to create employment in developing countries. SMEs provided many jobs and were important for the sector, but they were also facing competitive pressure. It was important to respond to the development of GFCs through training and upskilling in order to improve employability and efficiency. He stressed that flexibility and atypical and part-time jobs were welcomed by workers for many different reasons. For example, they could fit with domestic commitments or be the first step to permanent employment.
14. The Worker spokesperson agreed with the point highlighted in the Employers' presentation concerning the impact on the prices of agricultural products as a result of rising consumer demand. The outcome on jobs was not quite as harmless as presented by the Employer representative. The overriding question for the Workers was the quality of the job, as more flexibility supported a trend to more precarious jobs. He stressed – in opposition to the Employer spokesperson's position – the fact that there was no such thing as MNE labour standards, but that it was ILO labour standards that were relevant for all, including for MNEs. In his view, the most important standards on working conditions had been defined and laid down by the ILO. He concurred with the view in the Government's contribution that MNEs were, through GFCs, influencing trends that resulted in more insecure jobs.
15. The representative of the Government of Spain focused on examining the GFCs' impact on employment. Globalization was business driven and primarily an economic process. Governments would, nevertheless, like to hear from both the Employers and the Workers on how they viewed this economic globalization as affecting employment and, based on this, the Governments could draw appropriate conclusions regarding GFCs' impact on employment policy. He noted negative effects on unskilled workers but positive effects on skilled jobs. In addition, the relocation of jobs resulted in a decrease in jobs in industrialized countries while they increased in developing countries. There was a need for global social dialogue on this issue, and the ILO was the best forum. International labour standards should be applicable in all sectors in the context of GFCs and the concept of flexicurity as an important tool to deal with the employment issue should be encouraged.
16. In response to a request for clarification by the representative of the Government of South Africa, an Employer member from Germany confirmed that what he had said in his presentation had been misunderstood. The intention of his presentation was not to argue that working conditions in F&D processing were not important, but rather that F&D processing enterprises and retailers emphasized food quality and safety. He agreed with the Government representative of Spain that good employment and economic policies were interrelated. It was also a fact that improved productivity resulted in cheaper food prices,

which led to a growth in food production and more jobs. Demand for processed foods was expanding in some developing countries experiencing high per capita income growth, with corresponding growth in job creation in food production.

17. The representative of the Government of Argentina stated that in his country it was accepted that the employment function was integral to economic policy. In considering this point for discussion, it was important to address the issue of sectoral concentration of ownership in the industry at regional and national levels and how this affected jobs. A better understanding of this question would make it easier to address the issue of employment, which was a central theme in the ILO's work.
18. A Worker member from India reported that examples from his country as well as the entire South Asian subregion showed that the development of GFCs had been and continued to be detrimental to employment. The establishment of large food retailing chains was resulting in increased unemployment as these chains grabbed agricultural land, displacing small-scale rural farmers and labourers. Over 38 million small shop owners were expected to be displaced, as these big chains captured a growing share of the market. How could claims of concern for employment be reconciled with this development or with the displacement of employment, and how could the destruction of livelihoods due to the influx of multinationals in GFCs be avoided?
19. A Worker member from Argentina agreed with the view expressed by the Government representative of his country that the focal theme of GFCs should be employment creation. Workers were sometimes deprived of wage increases as a result of the development of GFCs. He decried the worldwide trend towards precarious employment and temporary contracts, and the recruitment of workers through third-party employment agencies. A concrete result of the trend towards GFCs in Argentina was that the influx of multinational F&D processing enterprises had caused direct job losses, a decline in the total number of people employed in the sector and income regression. The numerous acquisitions of small and medium-sized local food production enterprises had frequently led to job terminations and to the outsourcing of production and marketing operations. In general, these developments had increased productivity and profits, with fewer workers accounting for higher production levels, but at the cost of greater precariousness, inferior wages and higher unemployment. In summary, the impact of the development of GFCs in his country was negative. It was clear from the ILO paper that the effects of GFCs in Europe were similar, with a high proportion of the sector's value added concentrated in a very small number of major enterprises. Although food production volumes had increased, jobs had decreased. With regard to the emphasis on food safety and quality, it was important to underline that this could not be assured without concomitant job security and acceptable working conditions.
20. A Worker member from the Russian Federation noted that it was becoming difficult to identify the real employer in GFCs with certainty. She gave the example of a large enterprise in her country producing fruit juice which had been bought by a financial company. The banks which funded the purchase of that enterprise had asked for guarantees in the form of 100 per cent of the shares. Who was the employer in this case? This kind of situation, which gave rise to a power vacuum as regards the real employer, was becoming more common and was not reflected sufficiently in the report.
21. The representative of the Government of Spain completed his earlier statement by pointing out that governments had to balance the interests of workers, employers, consumers and also the taxpayers.
22. The representative of the Government of Nigeria referred to demographic factors and inherent preferences as regards F&D consumption. He pointed to the negative impact of the retirement of the older generation of farmers on the supply of food and drink. Nigeria

had encouraged younger graduates to take up farming. Capital had been provided to graduates at the completion of their training, followed by practical assistance through agricultural extension services. Small local producers, however, had difficulty competing with the multinationals. The large and efficient farmers were swallowing the operations of smaller ones, leading to redundancies. As regards food safety, the National Food and Drug Control Agency was improving the verification of and compliance with standards of quality in the F&D industry. In his country's food processing industry, the trend was towards more rather than less employment.

- 23.** An Employer member from Argentina viewed the impact of globalization of food chains as being significant in all regions of the world. Minor players had lost out, in favour of those who were able to incorporate the benefits of globalization in their activities, for example through the application of new technologies. Where there had been losses in employment in food and drink, these had been much less than in other sectors. Overall, however, there had been a global increase in production and a corresponding global increase in employment, implying that the general impact was positive. Proposals to minimize any negative impacts of globalization should, however, be supported.
- 24.** A representative of the Trade Unions International of Workers in Agriculture, Food, Commerce, Textiles and Allied Industries (UIS), France, was surprised to hear it stated that lower prices resulted from the development of GFCs. In Europe, prices had increased and it would be difficult to convince any European of the contrary. No society could be built on the assumption that wage earners were costs since they were the ones who created wealth. The speaker noted that workers were dismissed in considerable numbers in profitable enterprises, and gave some examples of multinational companies which placed their plants in competition with one another, with the less efficient ones threatened with closure even when they were profitable. Contrary to some views, labour costs were often only a small proportion of total manufacturing and distribution costs. It was also erroneous to believe that jobs lost in one location were gained in another. Finally, the notion that service jobs could replace those in food manufacturing with regard to their quality was untenable. The speaker gave the example of a product sold in France for around €2.70 when the labour force counted for a mere 14 cent share of that price. It was also wrong to believe that jobs lost in one place were jobs gained elsewhere. Nor was the idea acceptable that service jobs could replace jobs in industry in terms of quality.
- 25.** The Employer spokesperson saw the debate as being too wide-ranging and not necessarily relevant to the topic. Agriculture and retailing were not matters for the Meeting. He saw growth in employment in the F&D industry to be a result of the developing GFCs. Employers had to act and react in relation to the realities of the economic climate, but he did not agree that this led to less job security. Flexible working could mean all sorts of different situations: a full-time worker could be performing several jobs needing different skills; or women could be working different hours to balance work and family responsibilities. He recognized the trend towards more multiskilled employees. He partly agreed with some of the views presented by the representative of the Government of Spain up to a point, but not with the need suggested for global social dialogue. Regulation by the State or the ILO was not conducive to good employment policy or industrial relations. He wished that consensus could be reached on trends in the food chain so that the impact of those trends could be discussed and agreement reached on the way forward.
- 26.** The Worker spokesperson, summarizing the Workers' view on theme 1, stressed that, in examining the employment impacts of GFCs, it was essential to look at developments across the chain as a whole rather than in a single sector. Employment was becoming more atypical and precarious because of GFCs. He could not agree with the previous speaker's views, and felt that account should be taken of the views expressed by the various Government representatives who had spoken. Issues related to workers' contractual status throughout the GFC, from primary production through processing to eventual sale of food

and drinks, the increasing role of private equity and of finance, and benchmarking had been raised. The decline in sectoral employment resulting from GFCs was the most striking in that a growing number of people were shifting to the consumption of processed foods as a result of rapid urbanization.

27. The representative of the Government of Spain observed that there had been very wide-ranging discussions, but it would be essential to focus on what was within the ILO's scope – in his view, more and better jobs and a fair globalization for all were key topics for this sector.
28. The Employer spokesperson said that atypical work was essential to keep the industry competitive and was nothing new. There were no data as to its growth or impact on labour and working conditions.

Theme 2: Impact of global supply chain management on employment and work organization

29. A representative of the Office made a brief introductory presentation on the way recent trends in employment in the F&D processing sector had been influenced by the growth and development of GFCs. The effects on employment were mixed, with some job growth in low-cost countries and job losses in industrialized countries, while greater automation in processing and packaging was placing a downward pressure on low-skilled jobs across the board, but possibly creating new engineering and technical positions to oversee the new equipment. With respect to pay and working conditions, one could see better wages for longer-term employees, while the majority of downstream jobs remained close to minimum wage levels. Reorganization of work and increases in precarious work were apparent consequences of global supply chain management in F&D processing. Improvements in occupational safety and health (OSH) were observed, mainly in industrialized countries, where better procedures regarding the use of chemicals, handling of materials, and fire safety, as well as greater automation, could, in many cases, reduce risks to human operators. However, some OSH issues, such as musculoskeletal disorders in packing, slaughterhouse injuries, or the use of pesticides, still continued to create problems.
30. An Employer member from Hungary made a presentation to introduce the Employers' point of view, on the way global supply chain management was affecting employment and work organization. He cautioned that this testimony only represented his experience in Hungary. He started with a definition of consumers and citizens, their objectives and their choices, such as a reasonable quality of life, employment security, and enough money to sustain a better life within a competitive and free market economy. The price for a better life was uncertainty everywhere: for multinationals, for SMEs, for families or one-person enterprises, for retailers, for employees and for countries. It also required flexibility, the right mentality, and a capability to change, especially for employers and workers. Competition usually benefited consumers, limiting benefits for retailers, multinational processors, SMEs, farmers, and others, creating very dynamic price wars at all levels with all parties being forced to reduce their costs. Nevertheless, consumer prices did not always reflect the real competitive situation at given levels, since they depended on consumer purchasing power. In this game, multinationals could also be losers, considering their huge overheads. Horizontal competitors, in this respect, could be better off, in particular through restructuring or acquisitions and mergers, as well as outsourcing. This left a place for SMEs and family entrepreneurs. Flexibility should be such that, if there were insufficient jobs in food processing, people should be able to transfer to other sectors (such as catering and other services sectors). Government policies were vital to balance the situation. Outsourcing and atypical employment represented a chance for survival and were more acceptable than unemployment. Multinationals improved competitiveness, in particular by restructuring the market and the national economy, by restructuring the labour market and

increasing the level of competitiveness in international trade. This, in turn, led to higher GDP and a better quality of life in countries across the world. The multinational processors' impact on the quality of life was, among other things, strong brand names, increasing the range of quality products and choice, with a focus on product assurance, food quality and safety. Their effects on the labour market included the development of completely new jobs (advertising, marketing, IT, logistics, human resources), new skill competencies (such as teamwork), greater training, creating a shift towards intellectual work, chances for increased involvement of women, better salaries, possibly above the labour market average, help for retrenched workers to find other jobs, and purchase orders for SME suppliers and individual entrepreneurs. Multinationals tended to implement their own internal standards, while also promoting better health protection, safety at work, environment, ethics and fair trade (legal and voluntary commitments) and good citizenship (corporate social responsibility (CSR)). They aimed to be good or even the best employers, promoting good industrial relations, collective bargaining, and high levels of working conditions. The solution to any problem lay in government policies, within the framework of fair competition legislation, with strong social partners, in partnership and in special agreements with multinationals and possible alliances, and through the promotion of fundamental values.

- 31.** A Worker member from Brazil made a presentation to introduce the Workers' views on the impact of food multinationals on employment. She indicated that it was impossible to allude to such a theme without making a reference, in Latin America, to the physical and mental repercussions that GFCs had on workers' health. Regarding the physical aspects, one could mention the repeated, monotonous and permanent efforts involved, the intensive pace of work, excessive overtime, inappropriate ergonomics, vibration, as well as the absence of adequate breaks. The mental impact included the pressure to fulfil quotas, increased responsibilities with low remuneration, the demands to multitask, absence of communication and indirect pressures, precarious situations and absence of stability, and stress. Poultry production in Brazil illustrated these problems, as made clear by photographs related to this industry, taken from a national campaign by the unions. Workers insisted on the need to prepare and enforce new regulations to keep working hours within reasonable levels. Nothing had been achieved in this respect in the past few years, and nothing had happened at the negotiating table, but there was a compelling need for change in the near future.
- 32.** The representative of the Government of the Philippines introduced the discussion on this topic from the Government group, mentioning that Governments would like to include alcoholic beverages in the analysis of this sector. The effective management of pricing for F&D products had to be a social dialogue issue.
- 33.** The Employer spokesperson recalled the need to focus the Meeting on the F&D processing sector. As a result of globalization, proactive management had to respond to consumer needs and be competitive in order to create jobs. That required more effective work organization, which should be discussed between the social partners and there had been good results in the past decade on that issue. Effective work organization also meant better teamwork as well as more upskilling and multiskilling to meet the needs of new technologies. Workers also needed to be trained effectively so that employers could meet retailers' demands. Flexible work and temporary/atypical work were necessary, and opened options for more skilled opportunities. The trend for more developing countries to move from being raw material producers to processing food for industrialized countries should be viewed as positive, as should the creation of job opportunities in emerging markets. SMEs were similarly creating a huge number of jobs. He gave the example of a company in the United Kingdom which, being unable to satisfy its production requirements, decided to outsource the work to a company in Belgium, which recruited temporary workers to meet the retailer's needs. He stressed the fact that all employers had to respect the occupational safety and health needs of all their workers.

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- 34.** The Worker spokesperson argued that the discussion should focus on standards for the world of work as defined by ILO instruments. While SMEs were indeed important in job creation, Workers wished to focus on MNEs because of their significance in setting standards on productivity, economic development, working conditions and life in different societies. The presentation of the Worker representative from Brazil was an important illustration, because poultry slaughterhouses provided significant employment in Latin America and were a clear example of the impact of global supply chains on working conditions. Globalization and retail chains had a great influence on production, but it was also necessary to examine consumer trends. The brand name was becoming more important than the product itself, and there was a danger that the production process might be ignored. Work had also changed because hygiene standards had been strengthened, and SMEs often did not have the capital to implement the changes in processes required for compliance with such norms.
- 35.** The representative of the Government of Spain stressed the need for governments to prevent or mitigate the negative effects on workers and consumers of monopolies in GFCs and the need for a fair globalization by empowering the governments to achieve this. In this regard, two elements were essential: national policies to create and promote decent work, and tripartite social dialogue to transfer the national and sectoral dialogue to an international level. Thinking globally meant thinking about the ILO on a daily basis. In reforming the UN system, including the important discussion scheduled for the following month to strengthen ILO capacity, international labour standards and the EU social model should be considered as a benchmark.
- 36.** The representative of the Government of France linked MNEs with the acceleration of production processes in meat processing, which had had positive developments in new and qualified tasks, but a negative impact when such acceleration led to increased stress for workers. He proposed, in this connection, that governments should promote respect for international standards; that enterprises should ensure that before the installation of new production lines, impact studies be carried out; that education and training should be provided to avoid injuries, and that funding and access to training should be provided to all. Social dialogue was needed to meet these requirements. This was also true for the improvement of working conditions and employment skills, which required research and dialogue in order to identify new skills requirements and anticipate future training needs.
- 37.** The representative of the Government of South Africa observed that the F&D processing industry constituted a major part of the manufacturing in his country. Development of the industry had led to a need to improve food production technology, as well as to changes in the composition of the workforce, because some new jobs required higher levels of skills. On the other hand, the shift from upstream to downstream stages of production had left some of the skills currently available in the sector unused. Shifts in the nature of employment had occurred, and an increase in atypical types of employment had been observed, involving greater employment insecurity. However, the most important factor was the continuous increase in food prices in his country. He then turned to the question of the impact of global supply chains on F&D processing. A shortage of certain popular food products sometimes happened because of inefficient management of the supply chain. For example, a lack of carbon dioxide for soft drink production or bottles for a brewery, had led to temporary closure of production lines, and had put certain drink products out of stock in shops. His Government proposed that the processing of alcoholic beverages be included in any follow-up study, because of their job creation potential. Concerning food safety, the speaker shared the view of the representative of the Government of Spain. Government policies should be designed in such a way that they promoted decent work, because governments were aware that atypical forms of employment could have a negative impact on working conditions. Therefore, Governments should play a major role in ensuring that workers had safe workplaces and that they were remunerated fairly.

Governments should also look at the impact of globalization, ensuring that it was fair to the workers as well.

38. The representative of the Government of Argentina had a different opinion as regards the impact of global supply chain management on the sector with regard to employment and work organization. Based on the studies carried out on this topic, a closer look should be taken at the possible ways to analyse this. Any judgement of the impact needed to be based on empirical evidence. Concerning the role of the ILO, he considered that it was the role of the Meeting to discuss, advise and provide ideas about what the ILO could do. Another point that should be developed was capacity building and vocational training in relation to changes taking place in the sector as a consequence of global supply chains and how to prepare workers and enterprises to meet the challenges ahead. Social dialogue was a key element for the discussion, bringing together employment, work organization, training and other issues related to the impact of globalization.
39. The representative of the Government of the Islamic Republic of Iran commended the report. It had touched on the pressures and drivers influencing the sector, accordingly leading to employment losses and generation of new employment. Subsectors in the F&D processing sector were very distinctive and operated under different circumstances. Continuing advice and training for developing countries on the latest developments in the sector and in global supply chains should be provided especially to small and medium enterprises, including technical support in technology transfer, marketing advice, training on health and safety standards, and higher level qualifications of a technical and supervisory nature. In referring to the dominant position enjoyed by the large retailers in getting almost 50 per cent of the profit from F&D products, he proposed that they, in future, should support projects helping SMEs in developing countries. He proposed that an open dialogue be established with the key industrial large businesses to use their experiences and knowledge to shape future programmes for training and skills development. Without capacity building and transfer of science and technology, developing countries would not be able to tackle the challenges ahead. The ILO might undertake a survey to analyse how best to respond with regard to training for SMEs in this sector, and who should be involved in such a response.
40. The representative of the Government of Nigeria indicated that there were increasing numbers of companies engaging in food processing and supply of drinks. There were also major MNEs involved in the fast-food distribution business. There was fierce competition in that sector, which had resulted in significant job losses, especially in companies that had been previously owned by the Government. An exception was those enterprises that had been overtaken by multinational companies. The overall outcome regarding employment had been an increase in atypical jobs that did not guarantee job security, accompanied by job losses in all areas, except for the fast-food chains. Additionally, it could be observed that the so-called “ethnic” food manufacturers had been absorbed by and incorporated into the operations of F&D enterprises, through multinational franchising systems especially in fast foods. With regard to EPZs, there were many foreign corporations operating that did not allow easy access to labour inspectors and trade union organizations. This meant that no proper assessment of the working conditions and OSH standards of F&D firms in EPZs could take place, and collective bargaining was impaired or non-existent. He proposed that more focus be placed on training to equip workers with the competencies to fulfil changing skill requirements that had arisen due to technological developments. There was also a need to strengthen the Ministry of Labour to foster better labour inspection and labour protection, particularly for women workers, and with special reference to maternity protection.
41. The representative of the Government of the Bolivarian Republic of Venezuela welcomed the Employers’ readiness to assume responsibility for workers’ safety and health since that was what was expected of them. He emphasized the importance of the repercussions of

GFCs on trends in employment in the F&D industries. It would be unacceptable to turn the clock back with regard to progress on workers' rights under the pretext of the need for labour flexibility and on no account should so-called flexibility lead to a deterioration of workers' rights. The right balance needed to be struck between, on the one hand, the support given to companies which act within the legal framework, and the permanent respect for workers' rights won and consolidated at national and international level. No deterioration of decent work in conditions of dignity – as promoted within the ILO on a tripartite basis and through social dialogue – should be accepted.

42. A Worker member from the United States illustrated the impact of global supply chain management on trends in the meat packing industry. Some employers who had enjoyed good relations with unions had subsequently moved some of their production facilities from a unionized environment to places closer to where hogs were raised in a conscious effort to avoid unions and to obtain a lower paid workforce. After the turnover rate among local workers at the plant became too high due to the hazardous and difficult nature of the work, the employers turned to immigrant workers, initially recruiting economic migrants and refugees from South-East Asia and later recruiting workers from Mexico. In many cases the workers were not legally documented. A favourable publicist might make much of the fact that jobs had been created, but in reality the types of jobs and the level of remuneration in such operations needed to be scrutinized. The same company was also rapidly expanding in Europe. Among others, they had acquired companies in Romania as a source for pork products and they were outsourcing the hog-raising facilities to private subcontractors. When meeting a Romanian representative of the firm, it was indicated that management were not much concerned with working conditions. It was of course more attractive for them to hire people in Eastern Europe who worked for €1 to €2 per hour than in Western Europe, where workers were paid €20 per hour. Additionally, agricultural land could be bought at very low rates in Eastern Europe, and this was leading to shifting the production of more and more agricultural and processed goods away from Western Europe.
43. A Worker member from India focused on the use of child labour in the agricultural sector. He stressed that agriculture was the largest employer of child labour around the world, accounting for almost 70 per cent of all child workers. He welcomed the ILO's initiative to declare a World Day against Child Labour in 2007, which had supported the commitment to eliminate child labour in agriculture and subsequently to create a global partnership to fight against child labour, involving the ILO, the FAO, the International Fund for Agricultural Development (IFAD), the IUF and other organizations. He gave the example of a company in India which had produced an attractive poster saying that they did not use child labour, when in fact they did. He proposed that the ILO and employers in conjunction with governments and workers' organizations, as appropriate, should develop strategies to prevent such cases.
44. A Worker member from South Africa remarked that supply chain management could have negative effects on workers. For example, a continuous shift system on a 24-hour, seven-day week basis had a strong negative impact on the health of workers. Another negative effect was to be observed when experienced workers were retrenched in favour of young graduates who constituted a cheaper source of labour, as prospective employers did not need to spend much on their training. Addressing the issue of the leverage of players in the value chain, he indicated that some of the large European retailers were able to put pressure on F&D processors in developing countries to improve the working conditions under which their products were produced.
45. A Worker member from Malaysia spoke on behalf of several workers' organizations in Asian countries, where large multinational companies had established new factories or acquired local plants. In some countries there were national trade unions, but in others, the MNEs had established their own labour-management associations which made it difficult

for workers to discuss among themselves. He alleged that one MNE in the Philippines had changed its contract workers every five months for several years. If the company was really concerned about quality and safety in the F&D sector, why did they employ contract workers?

46. An Employer member from Germany considered the example of changes that had taken place in F&D enterprises during the process of German unification 17 years ago, during a very difficult economic situation. In spite of problems faced, the major MNEs made exemplary investments in Eastern Germany and very soon the working conditions there caught up with those in Western Europe. MNEs in many countries and sectors had set standards that were very positive. Pensions in many MNEs were excellent, as compared to national companies. MNEs also had the best training programmes and the highest skill levels among staff. Although some of the previous speakers had listed negative points, one of the objectives of MNEs was precisely the prevention of occupational accidents. MNEs were very proud of the low occurrence of accidents in their workplaces and a great deal of time and effort was invested to ensure this.
47. A Worker member from the Russian Federation referred to the statement of the Employer spokesperson that flexibility and atypical employment were essential for the needs of business, and that dialogue with trade unions helped enterprises to enhance their efficiency. However, how could one have dialogue with trade unions when an increasing number of jobs were atypical and were created through leasing, outsourcing and recruitment through job agencies? In the Russian Federation, manpower agencies existed outside the law, as there was no law on the use of manpower from these agencies and the Private Employment Agencies Convention, 1997 (No. 181) had not been ratified. In the Russian Federation, such agencies were not promoting good working conditions and contractual relationships with companies. Many agencies were simply created to meet the needs of a single enterprise or group of enterprises, and they did not defend the rights of the workers whom they provided to such firms.
48. A Worker member from Germany said that there had been some negative developments in the meat sector in Germany. Workers from Eastern Europe were often recruited illegally at wages below the poverty level (there was no statutory minimum wage in Germany). These enterprises created a situation of unfair competition with other enterprises that were complying with the relevant standards, and they were having a negative impact on the level of wages in the sector as a whole. She regretted having to state that the behaviour of some of these enterprises bordered on illegality as far as working conditions, wages, product quality and occupational safety were concerned.
49. An Employer member from Mexico gave details of the situation in the F&D sector in his country. His association represented 12 companies engaged in the production of chilli, sauces, condiments and tomato purée, etc. The industry accounted for 2 per cent of total employment in Mexico. Among the F&D processing workforce, 69 per cent were in production, 19 per cent in commercial activities and 12 per cent in administration. There had been a 12 per cent increase in profits in the sector compared to 5 per cent in the economy as a whole. Through social dialogue, employers and the trade unions had been able to establish and were satisfied that there was no child labour present in the F&D processing sector. He also noted that there were several major MNEs operating successfully in the F&D industry in Mexico. All the social partners in Mexico had agreed to eliminate child labour, but the F&D processing sector did not have any control over the agriculture sector.
50. An Employer member from Germany, responding to the Worker member from Germany who had spoken of subcontracting problems in the meat packing industry noted that, although there had been some problems, subcontracting by firms from Eastern Europe who employed migrant workers was entirely legal.

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- 51.** The Worker spokesperson, however, noted that the migrant workers referred to were receiving wages below the national legal limit. He thanked the Employer member from Mexico for providing figures on the F&D industry, but believed that it was the responsibility of the F&D sector to ensure that raw materials coming from the agricultural sector were not produced by child labour. He noted that two major points had emerged from the discussion. First, more research was required on the implications for MNEs and for SMEs of trends in GFCs. Second, it was clear that employers in the industry were sensitive to economic restructuring that eliminated jobs, and this was an important point for governments to be aware of.
- 52.** The Employer spokesperson noted that the sector could clearly not stand still while developments took place in the sector. Repetitive jobs had been reduced by tens of thousands in the industrialized world through automation, and this was likely to happen more and more in the developing world. Employers should work to reduce the number of repetitive strain injuries through measures including workstation improvements and adequate breaks. Occupational safety and health was a key concern and an important responsibility of employers. As to the issue of migrant workers, the relevant national legislation should be applied. He remarked that MNEs actually focused substantially on skills in the developing world. There were many links between MNEs and suppliers to improve the working conditions of agricultural workers. If the ILO needed best practice examples of this, there were ample cases that could be provided. He agreed that there needed to be a sound economic and business climate to improve productivity, as mentioned by the representative of the Government of Spain, but he saw this to be the role of governments, not of the ILO. The Employers' group supported the comments of the Employer member from Mexico in his intervention about the F&D processing sector not being responsible for child labour in agriculture. He also supported the comments of the Employer member from Germany regarding the use of migrant labour in the meat industry. Finally, he noted that MNEs have considerable influence in the GFC and there were examples of good practice, but it was not for the Meeting to dictate what practices should apply throughout the supply chains.

Theme 3: Future skills requirements

- 53.** A representative of the Office introduced the topic by making a presentation noting that the development of GFCs increased the need for management expertise, scientific and technological knowledge, industry-specific knowledge and skills, generic skills, and skills and expertise in quality assurance, food safety, and OSH. The key factors driving this need were stiff competition for skilled workers, high labour turnover, technology and process innovation creating a requirement for matching skills, changes in consumer demand, inducing greater skills requirements in specific processes, higher food quality standards and global relocation of production. Skill shortages could at times be mitigated by alternative production methods, but not always. Technology and automation reduced demand for some traditional skills while increasing the need for scientific and engineering skills and for multiskilling. New work practices emphasized teamwork, flexibility and adaptability, all of which reduced the demand for unskilled workers. Increased regulation required greater knowledge of food safety issues and a higher level of basic skills. Global sourcing of production had created a changing demand for skills in the destination regions and nations where production was outsourced. New technologies and process automation similarly increased the need for high-skilled workers and reduced that for low-skilled workers. With skill shortages there was increasing "poaching" among employers of skilled workers. He noted also that business size determined the level of impact of skill shortages on the enterprise. There was a need for institutional arrangements for education and training, but casualization of the workforce impaired workers' access to training. The 1998 ILO Tripartite Meeting on Technology and Employment in the Food and Drink Industries had emphasized the need for continuous and adequate training on or off company premises to ensure all employees could cope better with a market environment that was increasingly

competitive. It had also recommended that training programmes cover a wide range of technical subjects, in addition to communication, teamwork and leadership skills. More recently, the September 2006 Tripartite Meeting on the Social and Labour Implications of the Increased Use of Advanced Retail Technologies had concluded that job security should be supported by training programmes for employability and broad vocational skills to enable workers to adapt to demands for greater flexibility in business operations. It had recognized that retraining played a critical role and emphasized the need for social dialogue when developing a training programme.

- 54.** A Worker member from South Africa gave a presentation to introduce the discussion on the Workers' views that workers were human resources and not raw materials and that therefore skills development for workers to reach their full potential should be a priority, reflected in many ILO instruments. Employers had in the past prioritized skills development, but did so less today, even though the skills base was the key to economic development, and many nations required enterprises to invest in training. In South Africa's case, the requirement was for at least 1 per cent of the payroll to be allocated to training. Workers needed skill development for adaptability and mobility in employment in a changing economy. The reality, however, was that employer investment in training was declining as a percentage of wages; more jobs were being outsourced; less was spent on OSH and environmental safeguards; and investment in new technology was not matched by investment in training. He decried the fact that major sectoral employers were retrenching long-term workers and replacing them with graduates fresh from tertiary institutions, when they should instead be retaining experienced workers rather than unfairly profit from government expenditure on educating graduates. Food standards within importing nations also presented a problem for some developing countries that lacked the technology and necessary skills to ensure that production met those standards. Enterprises in value chains should invest 2 per cent of their payrolls in training and development, including training on OSH and food quality control, with training programmes developed jointly with workers through collective bargaining, to ensure workers' commitment to new technology and changing production methods, and thus ensure improved productivity.
- 55.** An Employer member from Sweden gave a presentation to introduce the discussion from the Employers' perspective. A number of professional and skilled occupations in the sector were becoming ever important in tandem with the globalization of food chains. Qualified veterinarians were in high demand, for instance, to help in controlling food hygiene and quality, especially given stringent food safety and quality standards in some of the most important markets, such as the United States. Despite this, the industry was facing problems attracting sufficient numbers of veterinarians. Food companies were similarly having problems in recruiting sufficient numbers of F&D processing engineers with the requisite qualifications. Comparable shortages of skilled workers could be seen in emerging functions such as product data handling and tracking all across the food chain, from the farm to the processing centre and the point of sale. Furthermore, while product automation might reduce the demand for functions requiring manual labour, it was frequently leading to an unmet increase in demand for workers with the requisite technical skills, such as electricians, fitters and turners. All these trends had important implications for educational and vocational training and for traditional apprenticeship programmes. Governments needed to ensure that vocational training programmes reflected employers' needs. The issue of a better match between training strategies and the needs of the labour market should also be high on the agenda of bilateral and tripartite social dialogue.
- 56.** The representative of the Government of the Philippines presented the main points from the discussion within the Government group, stressing the need for continuous skills upgrading, portability of skills, expertise in nutrition and systems validation in the context of greater globalization of food chains.

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57. The Employer spokesperson thanked the Office for its objective analysis of the situation concerning the demand for skills in the sector. Enterprises operated in a competitive and changing industry, where the need for specialist skills and labour that can help enterprises react to this changing climate meant recruiting the right staff with the right skills. It was the role of governments to provide basic literacy and numeracy skills through schools, so that employers did not have to take on that role. The major need for skills lay in the areas of flexibility and multiskilling. New skills were required in relation to new technology. Employers should work with tertiary education institutions to develop the right skills in occupations such as food technologists and food scientists. Worker members were right that workers needed skills for mobility and adaptability. Employers responded to gaps in available skills by adapting their own training programmes. Much on-the-job training was difficult to quantify. As to whether training should be subject to collective bargaining or not, this would be better left to local and national practice to determine.
58. The Worker spokesperson noted some general issues relating to skills development. Economic restructuring necessitated changes in curricula for skills development, and the question of the cost of training needed to be addressed. There were some key training issues, including OSH and quality control, which had been noted by his colleague from South Africa. Collective bargaining was essential to deal with vocational training: employers knew the industrial processes, but workers needed to know which skills they would require to secure future employment. Social dialogue was needed to find consensus. Reskilling was a concern for both qualified and less-qualified workers: in both cases it provided employment security, which was increasingly important with rising job precariousness from new technology. Examples of good practice on funding for training existed around the world, including South Africa's 1 per cent training levy and sectoral training authorities, and Brazil's tripartite training foundation.
59. The representative of the Government of Singapore described how his Government, in consultation with employers and workers, had developed an integrated continuing education and training system known as the Singapore Workforce Skills Qualifications (WSQ). The WSQ complemented pre-employment training developed by both educational institutions and vocational institutes in the country. It comprised three skills-sets for the workforce to stay competitive: (1) occupational skills specific to a particular job in the industry; (2) broad industry skills; and (3) generic employability skills that were portable across all industries, including workplace literacy, workplace safety and health, IT skills, communication and relationship management. Singapore's WSQs for retail and for food and beverages mapped out the skills required for jobs in the industry while showing workers how they could continue to upgrade their skills for career progress in the industry.
60. The representative of the Government of Argentina focused on two issues: (1) enterprise behaviour; and (2) human resources development. Decisions on skills development should be made through a tripartite process. Argentina had much experience in this area, including through setting up a mechanism for training in the F&D sector to meet future demands, that emphasized the goal of matching supply to demand for jobs in the industry. Among other initiatives, employment cards highlighting qualifications required for specific jobs in the retail sector had been created. The system had resulted in the establishment of standards for developing the skills required for work in food processing in the future. The importance of a sustainable financing mechanism for training was underlined. To this end, Argentina had set up a fund for financing training to which the Government, employers and workers contributed, even though Government's lead role in training was recognized. His Government also strongly believed that tripartism could enhance the effective implementation of the Conclusions concerning the promotion of sustainable enterprises, adopted by the International Labour Conference in June 2007. The conclusions adopted at the last tripartite meeting for the sector in 1998 also remained relevant, particularly paragraph 3 regarding the need for worker information and consultation on the introduction of new technologies. The Human Resources Development Recommendation,

2004 (No. 195) was similarly important when considering future skills requirements. The ILO Turin Centre should be involved in any ILO support on this subject. All action aimed at meeting future skills requirements should be undertaken on the basis of tripartite collaboration.

- 61.** The representative of the Government of Austria remarked that qualifications and skills were two sides of the same coin in the context of employment creation. Training issues involved a number of important matters, its financing was difficult and required cooperative decision-making between the government and social partners. With the increasing focus on food safety, the costs of vocational training and basic education had increased. In a similar vein, the growing economic importance of organic farming meant that food processing technologies required special attention and, consequently, improved education and training, starting with primary schooling.
- 62.** The representative of the Government of Poland reported that in her country most F&D enterprises were small and medium sized, particularly in production, with vertically integrated food companies being rare. Because of this sectoral structure, Polish companies needed to identify foreign markets for further growth, and appropriate skills were required to identify such markets. In this context, R&D as well as market development and food science skills would be a priority.
- 63.** The representative of the Government of France emphasized technological knowledge and qualifications as the priorities for the future. Governments must first identify what skills and professional competencies would be required by the sector in the future and how those skills could be developed. In the context of an ageing society, governments should devise mechanisms to systematically transfer skills and experience from older workers to less experienced ones in the sector. France had developed a mentoring system, financed by taxation, to assist the transfer of skills.
- 64.** The representative of the Government of the Islamic Republic of Iran agreed that the F&D sector lacked a skilled workforce, which was a serious challenge for present and future jobs in the sector. There was a difficulty in financing skills development programmes, particularly for managerial personnel and technicians, while low-skilled labour was relatively abundant. SMEs required assistance to acquire training more than was the case for large enterprises. The areas of skills development required included biotechnology, ICT, RFIDs, robotic science, and e-business for market development.
- 65.** The representative of the Government of Brazil presented an example of good practice in her country whereby workers' training was financed jointly by the government, employers and workers and was managed on a tripartite basis. Training programmes needed to incorporate such ILO principles as basic workers' rights and OSH. It was necessary to invest resources in basic and general education, as the scope of training had to be broader than vocational training and to increase training in specific occupations. She endorsed the view expressed by the Government representative of Argentina, emphasizing the need to increase training in certain trades in the sector and for vulnerable groups of workers. Sustainable skills training should be co-financed by government, employers and workers on the basis of decisions arrived at through tripartite consultations.
- 66.** A Worker member from Nigeria underlined the need for negotiated provisions to enhance the type of training workers received from employers as this was the most beneficial to both sides. As well-fed hens produced good eggs, so well-trained workers not only secured their jobs but were also the most productive.
- 67.** An Employer member from Argentina indicated that his experience confirmed that a well-established framework of social dialogue was a means towards successful vocational training.

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- 68.** The Worker spokesperson expressed pleasure at the consensus that qualifications and skills were extremely important for the F&D sector. Decisions on future skills requirements should be arrived at on the basis of social dialogue, strongly supported by legislation and adequate regulatory frameworks. Long-term skills development strategies contributed to the effective achievement of the ILO's Decent Work Agenda. The Government representatives of Argentina, Brazil, France and South Africa had rightly emphasized the importance of social dialogue in skills development for the sector.
- 69.** The Employer spokesperson underlined the fact that employers provided training in their companies to qualify workers for higher-level posts. It was important that workers moved away from gender stereotypes in which technical jobs and physical work were considered to be only for men; any job should be open to all equally.

Theme 4: Social dialogue and GFCs

- 70.** A representative of the Office introduced the topic, recalling that social dialogue was one of the fundamental values of the ILO as a tripartite organization. Social dialogue was both a means and an end: it was one of the instruments for labour market governance and achieving decent work. At the same time it was part of democratic governance, guaranteeing representation and voice at work. The F&D processing sector faced challenges which not only implied risks but also opportunities. The increasing vertical coordination of markets created an opportunity for the spread of healthy industrial relations and greater compliance with core labour standards. The lead companies in the sector had a particular responsibility in this regard. Good practice could be found in collective agreements at company level, which were negotiated solutions to a wide range of issues. A recent survey on social dialogue among social partners in 40 countries had revealed that the overwhelming majority of respondents (98 per cent) were convinced of the importance of social dialogue for decisions on social and economic issues. Social dialogue had proved to be an efficient and innovative tool of governance, very well adapted to the requirements of the modern economy.
- 71.** An Employer member from Sweden made a presentation to introduce the Employers' point of view. He enumerated a number of criteria that he considered to be preconditions for the functioning of social dialogue in the sector. He underlined that these were based on experience in Sweden and were intended primarily to stimulate discussion. The most significant precondition was the existence of independent workers' and employers' organizations with high rates of membership. In Sweden, about 80–85 per cent of the labour force was unionized, and the employers were also highly organized. There was little government interference in relations between the social partners. The labour market was relatively homogenous and regulations applied to all, whether they were public or private, small or large enterprises. The right to negotiate was stipulated by law, and negotiations were the primary means for dispute resolution. Collective agreements were only binding on the negotiating partners, but had a normative effect. The right to strike was recognized and bargaining was strongly centralized with decisions taken by the relevant organizations, in consultation with their members.
- 72.** An observer from the IUF made a presentation to introduce the Workers' views. He identified as good practice the example of the signature of an IFA between the IUF and a large multinational company in the food processing industry. The dialogue process in the enterprise had started over 20 years ago (in 1986) at the European level, and had been marked by the commitment and mutual recognition of the social partners. Since 1989, this dialogue had continued and made considerable progress at the international level. The IFA applied to the entire group and to all salaried workers. The framework agreement included trade union rights, gender equality, education and training for internal career paths, diversity, non-discrimination, exchange of information on future business plans and financial results, and mitigating the adverse effects of restructuring on employment

policies. It also contained references to international labour standards, a framework for collective bargaining and other initiatives such as codes of conduct and charters. The speaker concluded that within this agreement, globalization had been translated into global social dialogue.

73. The representative of the Government of the Philippines introduced the views of the Government group. She highlighted the important role of social dialogue in different countries. It was essential for governments to support social dialogue processes to ensure that the rights of all parties were respected, particularly that the right of workers to engage in social dialogue through their legal representatives was recognized. Some members of the Government group had underlined the need for continuing ILO support for research in the F&D sector, particularly assistance to the social partners in different countries to enable them to formulate quality framework agreements. Disseminating more information on the benefits of social dialogue was desirable for both employers and workers.
74. The Employer spokesperson believed that social dialogue was an important instrument to help businesses find solutions. While social dialogue globally had different meanings and content, the discussion in the Meeting should focus on social dialogue as defined by the ILO and in the context of the F&D processing sector. The forms and issues for social dialogue were matters for the parties concerned and should reflect national conditions. His group could not give blanket support for global social dialogue. The speaker underlined, however, that social dialogue had always played a vital role in this sector and would continue to do so.
75. The Worker spokesperson commended the IFA example which, even if it might not be feasible for other companies to adopt, was a useful option to consider and had proved to be a practical basis for cooperation between workers and employers. He pointed out that the higher the level at which social dialogue took place, the more it could cover issues of general concern and therefore provide a basis for discussing future orientations in specific sectors at the global level. In a number of countries, fundamental principles and rights at work were not respected. Core international labour standards needed to be implemented by all ratifying countries, and he called on multinationals to respect these principles. Collective bargaining (including negotiating salary levels) was fundamental in social dialogue, because salaries determined the living conditions of workers and their families. The Workers' group stressed that social dialogue was an essential precondition for ensuring sustainable employment and decent work.
76. The representative of the Government of Angola described his country as being a post-conflict economy, where even very basic F&D products were scarce. There were no food chains as such there, and wherever multinational companies had established themselves in Angola, their presence had a negative impact on employment. There was a need for social dialogue at all levels, for an agreement on common quality standards as well as on increased control mechanisms, and for strong trade unions in the sector.
77. The representative of the Government of Argentina considered that social dialogue, as a key pillar of decent work, should be promoted. There should be more effort to encourage this process through discussions, in particular with regard to collective agreements. He appreciated that the issues paper had provided positive examples on this topic and wondered what further steps the ILO could take in that respect.
78. The representative of the Government of Turkey gave a number of important statistics on the F&D sector in his country. It had an annual growth rate of 6 per cent, employed more than 360,000 workers, and a further 26,000 people were employed in the sugar sector. There were 20,000 organized F&D outlets, such as supermarkets, and 120,000 small shops. The food sector represented 5 per cent of Turkey's GDP and 20 per cent of the manufacturing sector. It had a motivated, specialized and young workforce. An interesting

project had been launched aimed at developing practical vocational skills, and strengthening social dialogue. The sector was strongly unionized, with 78 per cent of the workers being organized, and the union density was 98 per cent in the sugar industry.

- 79.** The representative of the Government of Singapore stressed the importance of social dialogue for his country. The system of dialogue was based on a tripartite structure. It was enabled at the national level (with, for instance, the development of fair employment practices), industry level (which proposed necessary improvements) and enterprise level (through agreements on bonuses, OSH regulations, etc.). The entire dialogue system was based on two key aspects, namely mutual trust and respect, and adopting a win-win approach.
- 80.** The representative of the Government of Poland recognized that average wages in the food sector in her country were not high, and that this disproportion with other sectors was not well accepted by Polish society. The strong pressure on prices by multinational companies had led some Polish F&D firms to bankruptcy and farmers into difficulties. All this had led to social discontent and she therefore called for wider social dialogue to mitigate the effects of the development of GFCs.
- 81.** The representative of the Government of Brazil highlighted the importance of collective bargaining and observed that a permanent tripartite commission on OSH existed in her country, and was setting standards and resolving problems in the F&D sector, among others.
- 82.** The representative of the Government of Nigeria remarked that social dialogue was very relevant in lead companies, in developing good corporate governance. Whereas laws determined how partners should progress, mutual discussion could settle issues such as wages, OSH issues, or conditions of service. Settlement of conflicts could sometimes involve government intervention, in particular through arbitration, to find peaceful solutions. SMEs were less involved in such practices. He suggested that wages could be regulated through sectoral or even IFAs, and saw CSR as a tool to complement existing legislation. Global framework agreements should include issues such as training. He concluded by noting that EPZs in Nigeria were places where trade unions were still not recognized, and government would need to resolve this problem.
- 83.** The representative of the Government of France stated that social dialogue was essential to the formulation and implementation of standards, and that it should exist at all levels in dealing with day-to-day as well as more permanent issues.
- 84.** The representative of the Government of Spain observed that social dialogue was central to good labour relations. Dialogue should function effectively at all times, even when sacrifices had to be made. He informed the Meeting that a new tripartite agreement in the F&D sector had recently been adopted in Spain, covering various aspects, including pay and working conditions. He trusted that steps could be taken by the ILO to encourage intersectoral agreements, and requested that such a position be reflected in the conclusions of the Meeting.
- 85.** The representative of the Government of South Africa concurred with his Nigerian colleague on the importance of IFAs. However, certain preconditions should be fulfilled. The strengthening of social partners was one of them, and the ILO's assistance was needed in that respect. Observing that social dialogue led to more mature types of industrial relations as well as to industrial peace, he suggested that it provided a channel where difficult issues such as the sustainability of the sector, educational aspects, capacity building, or competitiveness could be discussed.

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- 86.** The representative of the Government of the Bolivarian Republic of Venezuela highlighted the importance of social dialogue in the world of work. In his own country, the Regulations of the Organic Labour Law provided for a “Social Dialogue Round Table”, which was a permanent national structure and embraced all sectors and all labour issues. He stressed that social dialogue must rely on tripartism, in conformity with which his Government was always ready to reconcile in the best way the positions of the workers and employers, always applying the public provisions in place to protect workers.
- 87.** The representative of the Government of Malaysia described social dialogue as a fundamental mechanism for resolving problems between social partners and other stakeholders. Social dialogue was gaining in importance in his country, particularly in the context of rapid globalization. The Government of Malaysia believed that, in a changing workplace environment, social dialogue should be developed as a mechanism to prevent conflicts between the parties. Social dialogue could be an innovative means of keeping workers competitive.
- 88.** A Worker member from Argentina indicated that good social dialogue in the sector involving his union had led to more than 30 collective agreements. The supportive participation by the Government in the process was important, as success required a regulatory framework. In fact, Argentina’s recent changes in labour laws had contributed to the success of social dialogue.
- 89.** A Worker member from Ukraine pointed out that where no sectoral employers’ organization existed, trade unions were faced with difficulty in engaging in social dialogue. She indicated that employers’ hostility towards trade unions made it difficult to redress violations of labour rights.
- 90.** An Employer member from the United States, commenting on the Workers’ statement that multinational F&D companies did not abide by national laws, stated that MNEs respected – and were expected to respect – national regulations. Wherever such companies did not abide by national laws, it was the responsibility of the Government to enforce those laws. However, the structure of social dialogue should match national legal frameworks and local practices. He stressed that IFAs were voluntary agreements between individual companies and the employees concerned, and that IFAs should not be regarded as a mandatory mechanism of social dialogue.
- 91.** A Worker member from Japan indicated that the number of atypical workers in Japan had drastically increased in recent years. About one third of the total labour force were atypical workers, of whom only around 3 per cent were unionized, and their rights should be promoted. Atypical workers should be covered by collective bargaining, and social dialogue could play a pivotal role in improving their working conditions. A new law will be enforced in April 2008 in Japan, which guarantees equality of treatment, including working conditions, between full-time and atypical workers. Social dialogue was essential in cases of plant closures, the transfer of plants overseas, and corporate structural change. Many Japanese trade unions had concluded an agreement with their employers to conduct prior consultation on any event which might involve workforce reductions. MNEs were also covered by the agreement. They needed to abide by internationally recognized labour standards.
- 92.** A Worker member from Germany declared that international trade union solidarity between Germany and the United States had led to a collective agreement at a multinational food company based in the United States operating in Germany. She stated that although the outcome had in the end been beneficial to the parties, workers and the MNE had gone through a difficult period of lack of social dialogue.

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- 93.** A representative of the UIS, France, highlighted that the statements of all the Worker members reflected a serious situation which was worsening everywhere in the world. Decent work here or there which called into question international standards would not resolve the problem. The speaker claimed that if we let it happen, atypical contracts would become standard in the future. The speaker declared that under the guise of corporate social responsibility and the false claim that they aimed at lowering prices, the big capitalist companies fomented unemployment and misery for workers. As had been proposed by other Worker members, the entire supply chain needed to be considered. Multinational agribusiness companies, as well as those in the distribution sector drove world agriculture downstream through competition. The speaker stressed that securing peoples' food sovereignty was a major way to ensure that food was not used as a weapon against peoples or as an object of speculation, as was the case with maize in the United States. It followed, in the speaker's view, that the conditions for social dialogue in the ILO could not be reduced to the definitions provided by the social partners alone. The speaker joined voices with the Worker representatives to decry flexibility as the cause of worsening conditions of life and work of employees, but also as a weapon against trade union rights, adding that the free market was capitalism in disguise intended to check any debate on sharing the huge wealth accumulated. Decrying the attacks against the United Nations and the ILO intended to weaken the workers in their trade union struggles as well as their negotiating capacity, the speaker stressed that his organization intended to resist all such attacks and that in order to achieve that end, employees' united action on the international front was essential.
- 94.** The representative of the Government of China remarked that social dialogue had successfully contributed to creating trade unions at multinational companies operating in China. Tripartite national and provincial commissions had been established to resolve matters of interest to workers, employers and the public. Although trade unions were firmly established at state-owned firms, their presence in the informal economy or in foreign multinational companies operating in China were very rare. He stated that management at those foreign multinationals were likely to be opposed to unionization of their employees. However, at one plant of a foreign company which had been hostile to trade unions since 1996, a trade union had been formed in July 2006. Subsequently, when the company found out that the trade union could bring benefits to the company, five other plant-based trade unions had been allowed in less than one year.
- 95.** The Employer spokesperson, responding to the wish expressed by the Worker spokesperson, said that employers in the food and drink manufacturing industry had no global organization and Employer delegates to the Meeting had no mandate to set one up. Employers and workers had to deal within existing structures when it came to engaging in social dialogue. The form it should take should be a matter for the parties concerned, and would no doubt take into account national custom and practice. Practices which had been promoted by some multinational companies were not necessarily best practice for all companies in the sector. Similarly, there were no catch-all best practices applicable to all companies in the F&D sector. These facts naturally highlighted that IFAs were not necessarily good practices for all companies in the sector. Responding to the suggestions made by Government representatives, he suggested that the creation of international and/or intersectoral agreements in the F&D sector might result in imposing an unnecessary burden of bureaucracy on the industry as well as interference in the internal business of companies. He stressed that, because there was no such thing as a one-size-fits-all model, social dialogue should be promoted and adapted to needs at the local or company levels.
- 96.** The Worker spokesperson stated that the structure of social dialogue was not the issue; workers' participation in the decision-making process was fundamental. Decent work must be in place throughout the value chain, especially with regard to transparency on the employment conditions, from agriculture to food distribution. He stressed that, as far as

workers were aware, no companies had reported financial difficulties as a result of having concluded IFAs.

Theme 5: Future ILO activities for the F&D sector

- 97.** The Deputy Secretary-General of the Meeting introduced the fifth discussion point by illustrating how the ILO might help governments, employers and workers in the F&D sector to meet the challenges of GFCs. She stressed the importance of social dialogue as a tool for identifying, sustaining and meeting the social and labour relations challenges in managing change in the F&D sector. She provided information on some of the research and activities relevant to GFCs that the ILO had been undertaking. For example, the Office had collected data to map EPZs, and these indicated that the F&D industry currently had a major presence in these economic zones. The growth of global supply chains was a topic on which the ILO could undertake more research with a view to a possible general discussion at a future session of the ILC. Research could also focus on trends in employment, types of employment and labour relations in the processing layer of the food supply chain; the impact of technology on employment and skills development; and other areas of interest referred to during the discussions in the Meeting. These other areas included the impact of outsourcing and relocation of production on employment and working conditions; the relationship between productivity, technological innovation and employment in food chains; and the skills needs of SMEs.
- 98.** The speaker stressed the ILO's expertise in the promotion of international labour standards and asked the Meeting to give guidance as to future ILO activities in the promotion of decent work using the ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up and other relevant international instruments. She emphasized the role of skills development and training in enhancing the capacity of the sector to adapt to economic and technological change; and suggested that it should be discussed jointly with the social partners and the governments. There was also a potential role for the ILO in collecting and disseminating best practices in social dialogue within the sector. In conclusion she requested that the constituents provided guidance on how the ILO could support their efforts to meet the challenges of global F&D chains.
- 99.** The Employer spokesperson proposed the adoption of some criteria as to how the ILO could help the constituents. ILO assistance should follow from what had been discussed and agreed in the Meeting, and the needs that had been identified. Therefore, any assistance should reflect the focus of the Meeting, which had been on the food processing sector. The proposals for ILO action should be realistic and anything that the participants asked the ILO to do should be achievable, and take in consideration where the ILO was best placed to assist. Of primary importance would be a study on how GFCs operated and the human resource implications for the sector. Such research must be objective, with no assumptions about what was good practice and what was not, nor who were the most vulnerable workers and who were not – those answers should be the result of the research findings. He noted that no agreement on holding global-level social dialogue had been reached: any proposal for research in that area needed to be objective and not make assumptions, taking into account what had been agreed in the Meeting with regard to global social dialogue and the comments made during the previous session. For example, IFAs might be right for some enterprises but not for others and should not be regarded as the model. ILO training activities and publications could be used to provide assistance with education and training in the sector, and its work on health and safety issues was very useful, and one of the proposals could be to review and update the ILO publication

*Occupational safety and health in the food and drink industries*⁴ in the light of the latest best practice. Repetitive strain injury (RSI) had been extensively discussed at the previous tripartite F&D meeting in 1998. The ILO should prepare advice on best practice in managing health and safety to supplement national legislation, a major topic that should be addressed because various segments in the F&D industry were very different and had very dissimilar health and safety risks. As a follow-up activity, the speaker expressed the opinion that specific branches should be singled out for research. Rather than wait another eight years until the next sectoral meeting, he proposed that the ILO organize regional meetings to allow the constituents to share experiences of best practices on work in GFCs, the agenda of which did not have to be decided at the Meeting. He also suggested that all members of the Meeting should keep in touch with the Office with regard to opportunities to implement follow-up proposals and make inputs on how the ILO took the agenda forward. Such consultations would not only mean ownership and responsibility for the process but afford the constituents a chance to demonstrate to their colleagues the value of the ILO.

- 100.** A Worker member from the United States recommended that the ILO should produce a comprehensive study on the impact on workers' employment conditions and industrial relations resulting from corporate concentrations and the growth of global production systems in the F&D sector. The study should cover concentration in the sourcing and trading of agricultural commodities, in food retail in the processing sector and in the restaurant and catering sectors. It should investigate the impact of increasing corporate concentrations in combination with the growth of global production including highlights on: the conditions of work of women workers; the growth and conditions of work of migrant labour; the persistence of child labour; the growth of atypical and other forms of employment; and food safety, food security and the sustainability of the food system. The ILO study should also: encourage the development and use of different forms of social dialogue, including at the global level, that seek to mitigate the adverse impact on workers of changes in the food supply chain; encourage collective bargaining as a vehicle to address the issues that adversely impact workers in the global food supply chain; adopt a truly cross-sectoral approach, combining the expertise of the ILO in its different departments; and include an analysis of the impact of the development and use of GMOs and nanotechnologies on F&D processing and agricultural workers. He agreed with the Secretary-General of the Meeting on the importance of the ILO Conventions and stressed that the ILO should take account, in its work on the F&D industries, of the Workers' Representatives Convention, 1971 (No. 135), the Occupational Safety and Health Convention, 1981 (No. 155), and the Employment Relationship Recommendation, 2006 (No. 198).
- 101.** The representative of the Government of the Philippines stated that the Government group recommended that the ILO continue to undertake and support research in the sector, updating statistical data and sharing its databases on the sector. It should also assist in helping constituents to develop proposals for skills development in this sector, assist to identify best practices on social dialogue for training and education policies. A number of Governments similarly looked to the ILO to provide training assistance for constituents to enhance their capacity to negotiate framework agreements. Assistance in the design and delivery of training should aim at effectively addressing the negative impacts of recent trends in health and safety and management and technological innovations specific to the country.

⁴ S. Tomoda, *Occupational safety and health in the food and drink industries*, working paper, Sectoral Activities Programme, ILO, Geneva, 1993.

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- 102.** The Worker spokesperson referred to the summarized proposals of the Worker member from the United States which reflected the group's requirements. It would be useful, in addition, to promote negotiations for collective agreements to improve working conditions throughout the GFCs.
 - 103.** The Employer spokesperson considered the Workers' research proposal to be too broad. Members should, in any case, be closely involved in the development of the research programme and in its specific terms of reference as this should not be left solely to the Office to decide. It was important that the conclusions of the Meeting should be clear as to the exact nature of research required. Health and safety should be an important focus in such research.
 - 104.** The representative of the Government of Japan suggested that the ILO could support the Employers and Workers by collecting and disseminating examples of best labour practices in the sector. In Japan, the Government holds social dialogue meetings attended by representatives of the Government, workers and employers, the media and knowledgeable persons on such matters as social security and education.
 - 105.** The representative of the Government of China noted that sustainable development was important to safeguard employment in the sector. There was need for further research on the impact of globalization on human resource development and OSH; good practices as proposed by the Employers; and on the education and industrial policies to support the ability of the sector to continue to provide decent employment. Sustainable development needed social dialogue and international cooperation between international trade councils and unions, including through IFAs.
 - 106.** The representative of the Government of Argentina felt that all parties accepted further research; an analysis of the sector and its supply chains was needed to inform social dialogue. In the context of regional and global dialogue, the ILO should support the existing practice in some countries of conducting comprehensive national surveys of economic and labour market indicators on a sectoral basis. These could analyse the upstream and downstream influence of supply chains, at regional, national and local levels. Such surveys would support social dialogue aimed at developing responses to identified issues of concern.
 - 107.** The representative of the Government of South Africa suggested establishing priorities for future ILO activities. He could not agree with the Employer spokesperson that research should be "assumption free", since, by definition, research always started with a hypothesis. In his view, any future ILO research activities should also be planned around country-specific situations.
 - 108.** The Employer spokesperson said he was willing to use the word "prejudices" instead of "assumptions". He noted that in previous discussions someone had spoken of the need for research into atypical employment with the implication that such employment was intrinsically inappropriate.
 - 109.** The representative of the Government of the Philippines stressed the need for international comparisons, and therefore research to compile statistical data on the impacts of a global organization of food production. This would provide a basis for the interventions to improve workers' conditions.
 - 110.** The representative of the Government of Brazil endorsed the proposal made by his Argentinian counterpart for comprehensive national and regional level surveys. Similar analytical tools were used in Brazil as well as throughout MERCOSUR, and had proved their usefulness. The ILO should support such an approach.

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- 111.** An Employer member from Argentina associated himself with the recommendations of the representatives of the Governments of Argentina and Brazil. It was important that the ILO conducted country and regional level research. He noted how useful the 1998 F&D sector meeting had been and recommended that such sectoral meetings be more frequent. However, as such meetings were expensive, regional meetings might be considered. In addition, as important resources, issues papers for sectoral meetings should be updated regularly in between meetings.
- 112.** A Worker member from Argentina also supported the idea for national surveys, proposed by the representative of the Government of his country. Such research should aim at producing indicators for social dialogue. National and regional dialogue were needed to help understand the impact of supply chains on employment and workers.
- 113.** A Worker member from Japan, responding to comments by the Employer spokesperson that atypical work was not necessarily undesirable, noted that might indeed be the case in Europe where workers in such jobs might enjoy sufficient protection. Globally, however, workers in atypical jobs enjoyed lower levels of employment conditions and wages and it was rare that they had freely chosen such employment but that it was more likely to be imposed by the labour market. It was invariably the case that the more atypical the employment, the greater the wage gap and therefore the greater the social inequity and instability. Workers in such arrangements were less regularly employed and therefore were to resort more often to overtime which usually led to more OSH problems. Finally, atypical workers were the most likely to be unable to exercise the right to freedom of association. Atypical work was growing, was inherently insecure and more protection was needed for affected workers.
- 114.** A Worker member from Colombia, responding to the Employer spokesperson on atypical work, discussed the new free trade agreement between the United States and Peru which contained labour deregulation provisions in relation to temporary workers. Similar provisions existed in the United States–Colombia free trade agreement. The ILO should analyse the implications of these agreements.
- 115.** The Government member of the Bolivarian Republic of Venezuela endorsed the proposal by his counterpart from Argentina for a comprehensive regional and national diagnostic survey which would broaden the scope for food and beverage processing. Furthermore, regional meetings addressing all issues related to the sector would be beneficial. To achieve that end, the ILO's participation would be invaluable and would assist its tripartite constituents.
- 116.** The Worker spokesperson noted that the two previous interventions by Worker members had emphasized why atypical work was of concern. ILO standards on atypical work were crucial because this type of employment was precarious and, because of this precariousness, security of employment and decent work could not be achieved. Research showed a higher rate of accidents for workers in atypical jobs. His group fully endorsed the survey proposal from the Government representative of Argentina. Another area of research priority should be the impacts on working conditions of the development of GFCs.
- 117.** An Employer member from Germany stated that research should not be based on preconceptions. As to atypical work, he noted that the European Commission promoted the growth of part-time work as an entry-point to the labour market, especially for young people and the unemployed. Fixed-term contracts were also entry-points into employment. There was a need to have a balanced view of atypical work.
- 118.** An Employer member from Mexico indicated that productivity and wages in the F&D sector were rising. Atypical work was also rising, and played a crucial role in the sector's

performance. He pointed out that, the raw materials for the F&D processing industry were often seasonal, implying that labour demand was correspondingly seasonal. This was understood among social partners.

- 119.** An Employer member from Costa Rica presented an overview of the F&D sector in his country, which accounted for 5 per cent of GDP, 10 per cent of exports and 2.5 per cent of total employment. SMEs represented 97 per cent of enterprises in the sector, with MNEs representing only 3 per cent. EPZs had attracted FDI and created jobs, with their wages higher than for the rest of the economy. Costa Rica had sophisticated labour legislation and MNEs respect the law, often going beyond its requirements with voluntary codes.
- 120.** The Worker spokesperson suggested that, for the purpose of the Meeting, the definition of decent work be adopted from the one agreed in paragraph 10 of the conclusions of the ILO Tripartite Meeting on the Social and Labour Implications of the Increased Use of Advanced Retail Technologies. This provided that:

Decent work is a broad concept stemming from the ILO's mandate to improve social justice. It refers to the need for women and men to be able to obtain decent and productive work, in conditions of freedom, equity, security and human dignity. It covers six dimensions: opportunities for work, freedom of choice of employment, productive work, equity in work, security at work and dignity at work. Work organization in the context of new retail technologies needs to take these considerations into account.⁵

He noted that contrary to the positive view of MNEs in the F&D supply chains expressed by the Employer member from Costa Rica, workers had a different experience of MNEs. There was thus a need for neutral research on all aspects of the role of MNEs in GFCs.

- 121.** The Employer spokesperson stated that his group could not accept the definition of decent work proposed by the Workers as Employers had not had time to consider it. He nevertheless supported the idea of research into the sector and agreed there was a role for the ILO in this regard. He agreed with the Worker spokesperson's call for "neutral" research, though its scope should not be too wide. As to research into labour force trends, his group believed the continuing need for temporary employment did not mean that appropriate labour protections should not apply. Such protections were of course the responsibility of governments. Training and OSH protections should also be supported. Employers supported the idea of regional meetings to share examples of best practice, as well as global dialogue forums in which regional experiences could be exchanged. It was important that the conclusions be clear as to the exact research that was necessary. Health and safety questions should be of particular focus in the research.

Statement adopted by the Meeting

- 122.** During the Meeting, delegates from governments, workers' and employers' organizations participating in the ILO Tripartite Meeting to Examine the Impact of Global Food Chains on Employment, Geneva, 24–27 September 2007, learned of the assassination of Marco Tulio Ramírez Portela, a leader of the banana plantation trade union in Izábal (Guatemala).
- 123.** The Meeting expressed shock and horror in the face of this criminal act and condemned this act in the strongest possible terms and hoped that circumstances surrounding the case would be clarified as soon as possible. It further expressed its deepest sympathy and condolences to Mr Ramírez Portela's family and to the members of his trade union and workers of the entire world.

⁵ See *Note on the proceedings, Tripartite Meeting on the Social and Labour Implications of the Increased Use of Advanced Retail Technologies*, TMART/2006/11, ILO, Geneva, 2006.

Consideration and adoption of the draft conclusions by the Meeting

- 124.** The draft conclusions presented by the Working Party on Conclusions were introduced by the Chairperson of the Working Party, the Government member of South Africa. The draft conclusions were a result of a dedicated social dialogue effort. Each of the groups had constructively contributed to their creation. Employers had paid particular attention to their mandates and aimed to produce a set of conclusions that were clear and easy to understand. The Workers had focused on the wider context of the work and had attempted to make the draft as inclusive as possible. Governments had made suggestions which had helped to reach consensus on the basis of sound advice. The draft conclusions were therefore a reflection of the aspirations of all three groups and provided a good overview of the five themes which the Meeting had discussed. The draft conclusions comprised a clear and realistic mandate for the ILO's future work that took into account the Organization's limitations in relation to its mandate as well as in relation to human and financial resources. Finally, he clarified that paragraph 20 of the draft should have made reference to "advanced technologies in production, processing and distribution on working conditions and employment along the food chain", and not to "GMOS and nanotechnology", as printed in the document submitted.
- 125.** The representative of the Government of the Bolivarian Republic of Venezuela stated that the draft conclusions had been produced after a wide-ranging and constructive discussion and were also the result of the hard work of all. However, he expressed reservations with regard to the conclusions presented to the Meeting, with regard to paragraphs 8 and 11 where the term "flexibility" had been deliberately introduced, in such a manner that it could be perceived as yet another burden for the workers, an approach which had never been endorsed nor was being endorsed by his Government on grounds that it ran counter to workers' rights. This concept was not consistent with his country's Constitution, which protected workers from disadvantages resulting from increasing flexibility. The speaker added that, with regard to workers' rights, his Government constantly sought the highest achievable level through broad social dialogue, enshrining workers' acquired rights both at the level of the Constitution, laws and regulations, and supporting their development through collective bargaining; on that account, the speaker expressed reservations with regard to paragraphs 8 and 11 of the conclusions adopted by the Meeting, in order to place on record that he did not support in any way labour flexibility in conditions of work regarding any of the sectors.
- 126.** With respect to paragraph 9 concerning the proposed ILO activity to adapt on a sectoral basis the comprehensive national surveys of economic and labour market indicators undertaken in a number of countries, the representative of the Government of Argentina stressed that the ILO needed to make use of its field structure, when implementing the proposal.
- 127.** The Worker spokesperson stated that his group would have preferred to have stronger wording on the issues posed by the growing use of EPZs. His group was supportive of the text, but wanted to remind the Meeting of this aspect's particular significance for the food and drink sector. The number of countries in which EPZs existed had increased from 75 in 1975 to 350 countries in 2007. More than 66 million workers had worked in EPZs in 2006; nearly 80 per cent were women. In many EPZs, there were no laws to protect workers and to ensure trade union representation. He stated that, because more than half of global food and drink production took place in EPZs, it was all the more important that the ILO found solutions for improving the working conditions of these workers.
- 128.** The Meeting adopted the conclusions.

Geneva, 27 September 2007.

(Signed) Mr J. Rosales,
Chairperson.

Conclusions on the impact of global food chains on employment

The Tripartite Meeting to Examine the Impact of Global Food Chains on Employment,

Having met in Geneva from 24 to 27 September 2007,

Adopts this twenty-seventh day of September 2007 the following conclusions:

Theme 1: Recent trends in employment in food and drink processing

1. Growth and development in food and drink processing is in part driven by rapidly increasing consumption of food and drink products, higher demand for processed and convenience foods and “out of season” produce, which all have job-creation potential. Many global food and drink processors are redistributing their operations around the world in order to locate facilities closer to primary products, high-growth markets and lower production costs in highly competitive global markets. There has been a global redistribution of employment in food and drink processing, with a shift from industrialized to developing countries (and sometimes vice versa). Profitability, wages and employment may be conditioned by factors such as restructuring and fierce competition. Other employment trends include: the driving influence of supermarkets and fast-food chains on global food chains (GFCs), and investment in less labour-intensive technologies. There have also been some overall job gains in developing countries and some emerging economies, as consumers drive greater demand for processed foods and drinks. Every effort should be made to ensure the long-term sustainability of jobs within the industry.
2. Atypical employment is an aspect of the sector, and available data gives only a partial snapshot, which makes it difficult to determine employment trends.

Theme 2: Impact of global supply chain management on employment and work organization

3. Global supply chains have developed as both a consequence and a driver of global food and drink supply, production and distribution. There has been considerable change in the structure of employment and content of jobs in the industry around the world, and supply chain management has become increasingly sophisticated in an industry that has seasonal and other atypical forms of work. Technological innovations, developments in monitoring, scheduling, automation, acceleration of work processes and food safety have all had an impact on supply chains, employment and work organization.
4. The Meeting agrees that governments, workers and employers should contribute to the realization of the ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up, 1998, and promote decent work in the food and drink processing sector in the context of globalized food and drink supply chains. Decent work is a broad concept stemming from the ILO’s mandate to improve social justice. It refers to the need for women and men to be able to obtain decent and productive work, in conditions of freedom,

equity, security and human dignity.¹ Multinational enterprises should be encouraged to conform to the Tripartite Declaration of Principles concerning Multinational Enterprises and Social Policy, as amended in 2006.

5. Dynamic food and drink enterprises are developing products with quality and food safety in mind, bringing them to the market with new added value, investing in technology and research, incorporating best practices and fostering new job profiles and new competencies in the industry. Key aspects include greater efficiency, teamwork, multiskilling and effective use of technology. Management and labour cooperation is needed to address changing patterns of supply, demand, employment and work organization in the industry.
6. Competitive success can create decent work with more and better jobs for women and men in the food and drink industry; this can be encouraged through social dialogue. Proactive management of the change process can assist to meet competitive demands.

Theme 3: Future skills requirements

7. Work practices and skills requirements in the food and drink industries are closely affected by evolving consumer demand, the rapid development of GFCs, growing competitive pressures, and other trends along the supply chains. The workplace is constantly changing; existing jobs require new skills or are phased out while new jobs are created. New skills are required or old skills need to be upgraded for workers to update their professional qualifications. In accordance with business needs, employees should be offered the possibility to expand their range of skills, which may also enhance their employability. Management should assume primary responsibility in skills upgrading, training and retraining, which support business competitiveness and profitability in a changing marketplace while also providing workers with improved employment security and better career prospects.
8. Restructuring, new technologies, greater automation and new work practices put greater emphasis on teamwork, and on worker flexibility and versatility. This frequently reduces demand for unskilled labour while raising demand for workers with higher level skills, for example those with competence in food hygiene to meet stringent food safety standards in different markets. New skills, such as those for item and data tracking, are equally in high demand, while greater process automation has led to an unmet need for more skilled employees. There is an increasing need for more technical staff and workers with a capacity for adaptability and multitasking. In addition, food safety and regulations put a premium on workers with greater knowledge of food safety issues, and therefore a higher level of skills. Global sourcing for production is similarly creating changes in skills requirements at all stages of the supply chain across the world, including in new processing locations.
9. Training should also address occupational safety and health, food quality, as well as changes in production processes and product distribution. Regulations on food hygiene, safety and traceability are also key factors influencing skills requirements, and need to be reflected in training. Scarcity of qualified workers and significant skills gaps, in addition to high labour turnover, continuous technological and process innovation, and the growing dispersal of manufacturing facilities around the world, should be taken into consideration when developing and delivering training programmes.

¹ Decent work covers six dimensions: opportunities for work, freedom of choice of employment, productive work, equity in work, security at work and dignity at work.

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10. The Meeting recognizes the necessity for continuous skills upgrading of food and drink workers, and recommends that governments, employers and workers and their representatives should therefore work together to ensure that vocational training programmes should reflect business requirements and promote decent work. Training towards this end should aim at responding not only to the skills requirements of business, but also enable workers to acquire portable skills for employability.² This issue should be placed high on the agenda of social dialogue.
 11. It is primarily the responsibility of governments to ensure that schools provide basic literacy and numeracy skills. To this end, employers, workers and their representatives, have an interest in working closely with educational institutions. Given the business demands for workers' operational flexibility and worker multiskilling, as well as the need for new skills required due to the use of advanced technologies, the employer should provide appropriate training. Thus, workers can acquire the right skills in food technology and food science, and employers can be assured that the training programmes respond to changing business needs, while increasing workers' employability and employment security. Opportunities for training and skills upgrading should be equitable, and occupational stereotyping should be discouraged in order to avoid the exclusion of women and vulnerable workers from emerging and better remunerated jobs.

Theme 4: The role of social dialogue in globalized food chains

12. Social dialogue varies widely from one enterprise, country or legal framework to another. The term has a variety of different definitions; in an ILO context it includes all types of information exchange, consultation, negotiation and collective bargaining between representatives of Governments, Employers and Workers – and between the social partners themselves – on issues of common interest. It has a major role in promoting good governance, managing change, advancing decent work and improving representation. Social dialogue can be company-based, national, sectoral and sometimes international.
13. Social dialogue is acknowledged to be an important mechanism for developing, finding and sustaining effective solutions to social, economic and industrial relations challenges related to business, employment, working conditions and managing change in enterprises. Governments are called upon, in collaboration with the employers' and workers' organizations, to provide, maintain and support an enabling legal and institutional framework to encourage effective social dialogue, with due consideration to the ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up, 1998.
14. Examples from several countries illustrate that bipartite and tripartite social dialogue at national, sectoral and enterprise levels can lead to very positive results when it is based on respect for freedom of association and on sound national policies, on strong social partners, on mutual trust, respect and understanding, on timely exchange of information, and on "win-win" approaches. It can lead to sound and constructive industrial relations, and promote growth and a stable social environment.

² The term "employability" relates to portable competencies and qualifications that enhance an individual's capacity to make use of the education and training opportunities available in order to secure and retain decent work, to progress within the enterprise and between jobs, and to cope with changing technology and labour market conditions.

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15. Governments, and employers' and workers' organizations agree that in the context of globalized food chains, social dialogue could include, as well as traditional types of collective bargaining, discussion of: restructuring with effects on employment, productivity, sustainability of the enterprise and its workforce, occupational safety and health, equal opportunities, skills and training for employability, technology and its employment effects, maintenance or improvement of quality standards, as well as the working environment. Multinational enterprises can continue to play a lead role in this area.
 16. International social dialogue within and outside the framework of the ILO can be of great value to the social partners and to governments. Examples of the process of international social dialogue include ILO tripartite meetings and the International Labour Conference. Social dialogue has led, in some cases, to the conclusion of international framework agreements at the enterprise level, which may serve as a useful model for some enterprises, with appropriate adaptations. In some cases, such agreements can provide opportunities to ensure realization of the ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up, 1998, throughout their global supply chain, with leading firms providing best practice examples in this regard. The ILO should actively promote all forms of social dialogue, including collective bargaining where appropriate. The ILO should support initiatives by its constituents to develop innovative approaches to social dialogue.
 17. Social dialogue can assist in developing consensus on vocational training, since it accommodates the specific requirements resulting from industrial processes related to the development of GFCs, and enables workers to improve their ongoing employability. Good practices should be developed and implemented in different countries to support funding of training, where possible.

Theme 5: Future ILO activities for the food and drink sector

18. The Meeting requested the ILO to work closely with governments, employers' and workers' organizations on a local level to: (i) strengthen the capacity of social partners to engage effectively in social dialogue; (ii) examine best practices and other ways to mitigate possible adverse effects of globalized food chains on work and employment in the sector; (iii) facilitate dialogue and consultation with small and medium-sized enterprises (SMEs) and workers' representatives in recognition of the critical role that SMEs play in providing employment and decent work; (iv) explore ways in which the interests of atypical and migrant workers can be included in social dialogue; and (v) continue ongoing work on export processing zones.
19. The ILO should undertake further research, on the basis of terms of reference developed in close consultation with the tripartite constituents, to supplement information provided in the issues paper prepared for the Meeting on how GFCs operate and their human resource implications in the sector. The research should be properly focused, including on workers in atypical employment arrangements, outsourcing arrangements and relocation of production, with special emphasis on the situation of women and vulnerable workers. Its findings should be widely disseminated. Similarly, the Office could adapt on a sectoral basis the comprehensive national surveys of economic and labour market indicators undertaken in a number of countries, with a view to ascertaining the influence of global food supply chains at both the upstream and downstream stages. Such surveys could also be extended to the regional level, to reflect the fact that there are often regional protocols and agreements that can affect the overview to be gained. The findings would inform a social dialogue-based analysis for potential responses and reactions. In addition, ILO technical inputs are needed to support constituents on the design of vocational training, on occupational safety and health issues, including updating the previous report on best

practices on musculoskeletal pain, or on the overall management of occupational safety and health systems to complement national legislation.

- 20.** The ILO, in conjunction with relevant UN agencies, should evaluate existing research literature into the possible impact of advanced technologies in food production, processing and distribution on working conditions and employment along the food chain, and include the appropriate references in its pertinent database. In the light of the findings, the ILO should evaluate the feasibility of undertaking further relevant research on these issues.
- 21.** The ILO should ensure that the design and implementation of its activities in the sector is carried out in consultation with the constituents to avoid a one-size-fits-all approach. The activities to be undertaken in the food and drink sector, including reference to the development of GFCs, should be varied and emphasize a regional and national element. In this connection, Regional Meetings to examine developments on GFCs and their human resource effects would be the preferred medium, so as to provide an opportunity for the exchange of experiences between constituents from countries with comparable national circumstances.
- 22.** The ILO should promote the application to the sector, including in the context of globalized food and drink supply chains, of the rights and principles confirmed in the ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up, 1998, as well as those contained in the Tripartite Declaration of Principles concerning Multinational Enterprises and Social Policy, as amended in 2006.

Part 2

Other proceedings

Presentations

SECTOR's One Stop Window – A portal web site

Expert: Mr Paul Bailey, Technical Specialist, Sectoral Activities Branch, ILO, Geneva

In his presentation, Mr Bailey reviewed the One Stop Window (OSW) of SECTOR (www.ilo.org/sector). He stressed its importance for keeping constituents informed of forthcoming sectoral meetings and ongoing programmes. He indicated the dropdown menu that provided easy access to all industries, to cross-sectoral themes (violence and stress in the workplace, HIV/AIDS, EPZs, etc.) and to recent publications. The OSW also provided constituents with the option of discussion forums. A “What’s new” section allowed users to be kept informed of the latest developments related to all sectors. The most recently mentioned sectors included shipping: progress with ratification of the Maritime Labour Convention, 2006; the Seafarers’ Identity Documents Convention (Revised), 2003 (No. 185), and the recently adopted Work in Fishing Convention, 2007 (No. 188); education (HIV/AIDS workplace policies, World Teachers’ Day and the Joint ILO/UNESCO Committee of Experts on the Application of the Recommendations concerning Teaching Personnel (CEART); transportation (HIV/AIDS guidelines); and the schedule of sectoral meetings. The web site also existed in French and Spanish, and efforts were made to maintain updates in all three languages. The link to the EPZ database on export processing zones gathered together various ILO documents and contained up to date information on the number of zones and the levels of employment within those zones. The EPZ database also provides links to other sites and easy reference to cases under review by the ILO Committee on Freedom of Association. The database could be accessed directly (www.ilo.org/epz) or through the OSW. It was expected that the database could contribute to the knowledge base needed to develop the ILO InFocus Initiative which would be explained by the next speaker. An explanation of the SECTOR*Source* database would also follow.

InFocus Initiative on EPZs and database

Expert: Ms France Auer, Senior Relations Officer, Office of the Executive Director, Social Dialogue Sector, ILO, Geneva

Ms Auer noted the importance of EPZs in general and that the Programme and Budget for 2006–07 contained a provision for an InFocus Initiative on export processing zones. A task force in the Social Dialogue Sector was coordinating it, noting the significance of social dialogue in such a context.

Growing numbers of countries engaged in the global economy through EPZs. Some EPZs had become an important link in the global production systems of certain sectors. In many countries they had contributed to improving employment opportunities, salaries and working conditions. However, ILO research had also shown that provisions of national labour legislation were often not applied and that working conditions often exploited the desperate need of many women and men for some form of job. Guided by the relevant Governing Body discussions, this Initiative would draw on work in different parts of the Office focused on specific economic sectors. Using social dialogue and a rights-based approach, the Initiative would seek to foster effective, coordinated national policies on decent work, which encourage investment and trade and promoted core labour standards and adherence to national laws. The aim would be to develop advisory services to governments and others that fostered an upgrading of the quality of both employment and

production in EPZs. She highlighted preparations for a report to the March 2008 session of the Governing Body which would have snapshots of major trends. Furthermore, she cited a workshop held in Madagascar in June, a training project being implemented in Sri Lanka and activities planned for Costa Rica.

Food industries located in EPZs

Expert: Mr Jean-Pierre Singa Boyenge, collaborator/ILO project for the improvement of productivity through the promotion of decent work, EPZs in Madagascar

Mr Singa made a presentation on the food industries located in EPZs as a contribution of the Sectoral Activities Branch to implementing the InFocus Initiative on EPZs. The data had been sourced from the information published by export processing zone authorities on their respective web sites. Although EPZs had initially started with companies in the textiles and clothing industries and electronic goods, they now included companies in the food and drink sector and services sector (data processing, call centres, etc.) Most of the workers employed in the food companies were younger workers, the vast majority of whom were women. Generally speaking, these were low-skilled jobs. Recruitment was mainly by word of mouth. There was not too much evidence of unionization or collective bargaining. He also presented some specific data on the food sector in EPZs.

Ms Walgrave noted that it was also important to look at the total cost of labour in EPZs and not just hourly wages, and the local purchasing power also had to be taken into account.

The representative of the Government of Argentina asked whether there were differences in wages between women and men, and if the study would include further countries as well as comparisons with other sectors.

Ms Auer explained that there would be comparisons included in the study and that the purpose of the study was to detect trends. Wages in EPZs were usually higher than in the economy as a whole and a gap between men and women was also found in the rest of the economy.

In response to another question about exemptions from national laws or regulations, Mr Bailey cited the example of Bangladesh where the EPZ Act had suspended the industrial relations code which was applicable to the rest of the country. However, a new EPZ Act promised to recognize workers' associations.

In response to a question from the representative of the Government of South Africa, Ms Walgrave explained the tripartite composition of the ILO. The governments were also members of WTO, and there was a need to take into account the global view of development. The ILO had to take into account the requests of the Governing Body. When the Governing Body examined the report submitted to it next March, it would take a decision on follow-up action related to decent work and improvement of the situation of workers and employers in EPZs. Mr Bailey mentioned the conclusions of the Tripartite Meeting of Export Processing Zones–Operating Countries held in 1998 which could be viewed on the OSW.

The representative of the Government of Nigeria raised three issues: the relation between level of training and accidents; workers with infectious diseases contaminating products; and the universality of ILO principles.

Ms Walgrave thanked Nigeria for the inputs, declaring her agreement with the former speaker's first point – the links between level of training and accidents – and recognized that more work needed to be done in that area as part of the InFocus Initiative. Highlighting the work of the ILO with other agencies, the speaker called attention to the dedicated efforts of the Director-General of the ILO who was constantly trying to strengthen the mandate of the Organization, for instance in the context of the MDGs. Mr Singa added that the ongoing project in Madagascar was precisely targeting better productivity through decent work.

SECTORSource database

Expert: Mr Ralph Doggett, ILO consultant

Mr Doggett made a presentation on SECTORSource with specific data for the food and beverage industry. He outlined the benefits of SECTORSource, the sources of data, coverage of data, details of the thematic categories, how the food and beverage industry is classified, the availability of data among the sources, country coverage and information on how to use SECTORSource.

In reply to a question from the representative of the Government of Nigeria, Mr Doggett explained that value added was a statistical concept obtained by adding up the total production in a country. In response to a question from the representative of the Government of Argentina, he explained that most information cited was available on the Internet, free of charge, but that some databases required a subscription. Regarding the availability of SECTORSource, he explained that it was still under development, but was made available to users, on an ad hoc case-by-case basis for testing. With regard to his question about industry coverage he explained that it depended on what each country reported.

Closing speeches

The Employer spokesperson, on behalf of the Employers' group, expressed satisfaction at the final outcome of the Meeting and trusted that the conclusions would have a value in improving the competitive success of the industry and the well being of those who worked in it. The Employers, in order to reach consensus, had compromised on a number of points which they would have preferred not to do. However, having reached agreement, they stood by it. He therefore asked that, where speakers had expressed various reservations after the conclusions had been reached, these comments be recorded in such a way that it was clear they were not part of the conclusions. He stated that the Employer constituents had been pleased to work with the ILO; his group's participants were prepared to provide help and assistance to the ILO in taking forward the work resulting from the conclusions, and would like to be kept informed of progress. He thanked the Workers' and Government groups for their contribution to the successful outcomes of the Meeting, and also the ILO and Employers' secretariat for their support during a most valuable four days.

The Worker spokesperson appreciated the Employer spokesperson's recognition that the conclusions represented a spirit of compromise among the groups. He welcomed that the Employers endorsed the conclusions, since these also reflected trade union values. He reminded the Meeting of the importance of freedom of speech and freedom of association as a means of democratically expressing workers' views and to defend their interests. He expressed his heartfelt thanks to Ms Walgrave, Ms Tinoco and the secretariat for their excellent team work.

The representative of the Government of the Philippines thanked the group for their support and contribution as well as the Workers' and Employers' groups. She also thanked the Officers of the Meeting for their hard and long hours of work. The Meeting had been a concrete step forward in strengthening social dialogue, working with dynamic people coming from countries with different backgrounds and perspectives.

On behalf of the Director-General, the Secretary-General congratulated the Meeting for its excellent work. One of the important messages of the Meeting, in her view, was that the ILO should continue to work with its constituents in the field wherever labour and social problems came to the fore. The outcome of the Meeting would be reported to the forthcoming Governing Body session in November 2007 and the Director-General. The Office, through its respective entities, would keep all the participants informed of progress in implementing the proposals in the Meeting's conclusions; consultations on this issue were envisaged. She thanked all the participants as well as the Deputy Secretary-General and her team for their excellent work.

The Chairperson congratulated the Meeting on achieving its mission through tripartite social dialogue. The Meeting was a forum in which all the participants had taken a genuine tripartite path to reach consensus. He thanked everyone who had been involved in the Meeting, observing that only everyone's hard work had made the Meeting possible. The Chairperson wished all participants a safe journey home and declared the Meeting closed.

Evaluation questionnaire

A questionnaire seeking participants' opinions on various aspects of the Meeting was distributed before the end of the Meeting.

1. How do you rate the Meeting as regards the following?

	5	4	3	2	1	
	Excellent	Good	Satisfactory	Poor	Unsatisfactory	Average score
The choice of the agenda item (subject of Meeting)	9	16	4	1	0	4.1
The points for discussion	5	20	2	3	0	3.9
The quality of the discussion	5	15	7	3	0	3.7
The Meeting's benefits to the sector	5	18	3	2	0	3.6
The conclusions	4	16	4	4	0	3.4
Opportunity for networking	8	7	11	3	0	3.5

2. How do you rate the quality of the report in terms of the following?

	5	4	3	2	1	
	Excellent	Good	Satisfactory	Poor	Unsatisfactory	Average score
Quality of analysis	4	15	8	1	2	3.6
Objectivity	4	18	5	4	0	3.8
Comprehensiveness of coverage	4	11	10	7	0	3.6
Presentation and readability	9	9	9	1	0	3.6
Amount and relevance of information	5	12	11	3	1	3.7

3. How do you consider the time allotted for discussion?

	Too much	Enough	Too little
Discussion of the report	2	24	4
Presentations	1	26	3
Group meetings	5	23	2
Working Party on Conclusions	9	12	6

4. How do you rate the practical and administrative arrangements (secretariat, document services, translation, interpretation)?

5	4	3	2	1	
Excellent	Good	Satisfactory	Poor	Unsatisfactory	Average score
16	12	2	0	0	4.4

5. Respondents to the questionnaire

Governments	Employers	Workers	Observers	Total	Response rate
15	8	6	1	30	33.3

6. Participants at the Meeting

Governments	Employers	Workers	Technical advisers	Observers	Total
24	16	17	21	12	90

7. Delegates/technical advisers

	Governments	Employers	Workers	Total
Delegates	24	16	17	57
Technical advisers	9	0	12	21

8. Female participation

	Government	Employers	Workers	Total	Percentage
Delegates	5	2	5	12	21
Technical advisers	6	0	4	10	47.6

**List of participants
Liste des participants
Lista de participantes**

Representative of the Governing Body
of the International Labour Office
Représentant du Conseil d'administration
du Bureau international du Travail
Representante del Consejo de Administración
de la Oficina Internacional del Trabajo

Sr. Julio Rosales, Director de Asuntos Internacionales, Ministerio de Trabajo, Empleo y Seguridad Social,
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Members representing Governments
Membres représentant les gouvernements
Miembros representantes de los gobiernos

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MALI MALI

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Miembros representantes de los empleadores

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Mr Attila Boródi, Executive Chairman, Federation of Hungarian Food and Drink Industries (FHF), Budapest, Hungary

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