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REGIONAL PRODUCTION CHAINS

Report on cases and trade union perspectives for the Andean region:
COLOMBIA, ECUADOR AND PERU

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CONTENT

Introduction

A large part of the reports produced by the Trade Union Confederation of the Americas (TUCA) and its Labor Observatory of the Americas (LOA) have focused on global production chains (GPCs) and all aspects thereof. This report is no exception in that regard, although it seeks to enrich the landscape with new elements in a little explored terrain, the specificity of the GPC actions at the national and subregional level, specifically in three countries in the Andean area.

Historically, the international division of labor, under the influence of Western countries and big capital, has assigned Latin America a role mainly oriented towards the production and export of commodities. This approach has also imposed a logic of dependence of our countries, whose industrial and manufacturing development is incipient, in relation to the interests of the centers of economic power. This process has resulted in a serious detriment to local economic development.

The TUCA in its Development Platform of the Americas (TUCA, 2020) points out that regional integration should not be understood as trade exchange and tariff deregulation, as this is based on the neoliberal idea, of a regionalism that only encourages competition between countries to attract transnational investments through deregulation policies, which are making the life, work and environment of the people of America increasingly precarious. Therefore, it is extremely important to overcome the vision of development of the countries of our America solely based on links with the industrialized powers. This report reflects this research and synthesis of the experiences of regional production chains (RPCs).

The objective of the report below is to review the behavior and current scenario of the RPCs in Latin America, with special emphasis on Andean countries: Colombia, Ecuador and Peru. We will take some practical examples of each country to have a closer look at their economic reality, their linkages, their vision and productive vocation, as well as the working conditions they generate.

2023 has been a brief period in which local economies are recovering from the devastating impact of the Covid- 19 pandemic. The economic dynamism of the region has slowed down notably, which could indicate the end of the rebound stemming from the economic measures adopted during the pandemic emergency, and the beginning of a “real normality” in the post-pandemic stage.

Another relevant aspect of the current economic landscape is growth, which stood at 3.8% for the countries of Latin America and the Caribbean in 2022. This value represents barely more than half of the growth recorded in 2021, which reached 6.7%, according to data provided by ECLAC and ILO (2022), and it has been accompanied by a rise in the inflation rate (price increase), especially in the food and energy sectors.

Labor markets have shown improvements in their key indicators, such as rates of participation, unemployment and the number of the employed. Despite these advances, the region is still far from reaching the levels recorded before 2020. The recovery has been uneven between different countries and influenced by the specific labor realities of each one, with high levels of informality and notable gender and generational inequality (ECLAC and ILO, 2022).

Given this regional economic landscape, we need to examine the sectors and companies that make up the RPCs in the continent and how they are energized or leveraged through intra- and interregional trade agreements and groups, such as the cases of Mercosur, the Pacific Partnership or the Andean Community of Nations.

From the perspective of the labor movement of the Americas, to examine whether RPCs can represent a commitment to improved working conditions for the working class and the development of our Latin American economies, in contrast with the unfair conditions observed in GPCs, is a task that will prepare us to address the current challenges.

The 4th TUCA Congress (TUCA Executive Secretariat, 2021) indicates that unionism in the Americas is committed to a counterhegemonic and sustainable development perspective, based on principles of social justice, economic justice, gender equity, democracy and human rights, whereby it is our duty to study whether

these regional chains are nothing more than a local reproduction of the same production and labor relations of the global chains, so that we may understand what to expect and define how the trade union action can be strengthened to generate better living conditions for workers.

What are Regional Production Chains (RPCs)?

Political and economic context of Latin America

In 2023, Latin America is immersed in a conflict between sectors. Sectors are divided in the progressive spectrum and the conservative and neoliberal groups. The latter include the traditional oligarchies and bourgeoisies of the region, as well as the new emerging economic elites.

In this scenario, Latin America is torn between different projects. On the one hand, those seeking to perpetuate the widespread relations of exploitation in the continent and use State apparatus to reach these objectives; and on the other, we see political visions with differing nuances that share the common aspiration of redistributing wealth, prioritizing public spending and guaranteeing rights for the population.

Since Latin America is a territory of geopolitical and economic importance, it is also the territory of a trade struggle to conquer markets. Led by China, the BRICS countries are involved in a trade battle with the US for economic supremacy in the region, which is nothing more than a regional expression of the global struggle between the BRICS and G7 countries, polarizations aggravated as a consequence of the War in Ukraine.

In its 4th Congress the TUCA announced that one of the causes of the regressive policies on the continent was the result of pressures exerted by international financial institutions such as the International Monetary Fund, the Inter-American Development Bank, the World Bank, the Organization for Economic Cooperation and Development and the World Trade Organization, that continued their operations after the pandemic and renewed their efforts with the new right-wing governments setting up in the continent, exerting financial pressures that affect the sovereign decisions of Latin American governments.

Another element that with a profound impact on the continent's political situation is the increase in inflation that started in the first semester of 2022, which has affected the real value of salaries and purchasing power of the working majority. Inflation has exceeded the highest averages recorded since the global financial crisis in 2008 (3.9%). Already in 2022, inflation was 8.6% and 6.5% by the end of the year. All of this contrasts with other socioeconomic data that, although the labor structure of the countries shows some recovery due to the rise in employment rates, perpetuate the structural poverty of workers.

At the beginning of 2023, the World Economic Forum estimated that the growth of Latin American countries would be 1.3% (Salazar-Xirinachs, 2023), revealing continued stagnation, growing inequality, State governance issues for the creation of more and better sources of employment, as well as difficulties in social investment for education. All of this is increasing social pressure, accumulating discontent among the working majority and the middle class that increasingly expect politicians to fulfill electoral promises, especially those related to public investment in social programs and universal healthcare.

How did RPCs start and develop in Latin America and the Caribbean?

International trade has undergone notable transformations in recent years, both globally and continentally. One of the most notable aspects is the growing and prominent role of the countries of the Global South, often referred to as "dependent" or "underdeveloped", in this scenario. According to data of the Economic Commission for Latin America and the Caribbean (ECLAC), participation of world trade rose from 16% in 2000 to 24% in 2011. It is relevant to highlight the dynamic participation in trade between countries of the South. For example, in the 20- year period from 1990 to 2010, global trade increased by a factor of 4, while South-South trade experienced much steeper growth, increasing by a factor of 11 (Solimano, 2013).

This South-South trade occurs primarily in "underdeveloped" countries of Asia. In the case of Latin America and the Caribbean, it only represents 3.2% of exports of the South, which shows the weak role of this trade in the region. One of the characteristics is the predominance of natural resources and commodities such as copper, oil, soybeans, iron, bananas and coffee, a trend called the "recommodification" process of Latin American foreign trade. In 2011, 42% of Latin American and Caribbean exports were commodities, and manufacturing exports were declining (Solimano, 2013).

However, not all the continent's export patterns are identical; there are differences depending on the geographic area. In South America, export industries focus on the commodities sector and manufacturing that relates to natural resources. In the Caribbean, exports relate to tourism, transportation and finance, and the manufacturing industry is more predominant in Central America and Mexico (Solimano, 2013).

Another element worth considering in relation to Latin America's export pattern is the presence of few companies. About 100 companies represent 45% of all exports of the region, of which 80% are linked to the exploitation and processing of natural resources. The majority are State-owned such as CODELCO in Chile, PDVSA in Venezuela, PEMEX in Mexico and PETROBAS in Brazil. It is worth noting that the most diverse and numerous exports of the region are represented by companies that export interregionally (Solimano, 2013).

In Latin America and the Caribbean, different regional agreements, the best known are the Caribbean Community (CARICOM), the Southern Common Market (MERCOSUR) and the Andean Community of Nations (CAN), which began and developed seeking greater productive integration based on joint development and growth. Later, agreements such as the Pacific Partnership (PP) were also established, seeking to generate a uniform regulatory framework, allowing international projection, mobilization of more exports and greater investments (Amar & Landau, 2019).

Based on regional studies and debates, the TUCA has conceptualized that GPCs refer to the patterns of change in production that are characterized by geographical dispersion and the breakdown between the processes and necessary phases to generate the goods and services

The production processes of global chains are developed in three geo-economic epicenters where three planetary-scale "mega factories" operate:

1. The "North American mega factory" led by the US, and where Latin America is traditionally inserted
2. The "European mega factory", structured largely in Germany
3. The "Asian mega factory" led by China (Lima & Zaclicever, 2013)

In the past all three were conditioned by the formation of regional agreements, for example, in the case of Latin America, by free trade agreements, and in the European case by the creation of the European Union, which provided institutional and legal support to the relocation of production (Amar & Landau, 2019). Therefore, the so-called global production chains can also be conceptualized from a regional perspective.

In Latin America there are production chains, the links of which mostly occur in the countries of the region and in trade and productive exchanges between neighboring countries, as is the case of: Argentina-Brazil, Ecuador-Colombia-Peru, Brazil-Uruguay, where the automotive and chains of auto parts, electronics, aeronautics and clothing are notable (Wahren, 2018).

Figure 1 presents the value flows participating in the regional chains, the column identified as "origin" shows the countries where the value originates, the user/transformer column shows the countries in which the originated value is transformed and exported once again.

In total, RPCs mobilized 24.5 billion dollars in added value in 2011, which represented 14% of total interregional trade (Amar & Landau, 2019). Similarly, it is worth highlighting that 62% of RPCs start in MERCOSUR member countries, and 26% in those of the PP. Brazil Is as the South American country that contributes most foreign added value to exports for the countries of both interregional groups.

The regional or interRPCs that we refer to in this report relate to these same production processes, where their linkages are concentrated in the Latin American region, in particular in three countries: Colombia, Ecuador and Peru. This requires discussing the interregional agreements that bring these three countries together, i.e. the

Andean Community of Nations (CAN) and the Pacific Partnership (PP), without overlooking that some insights can be generalizable and/or taken into account from a continental perspective, and others respond to particularities of the Andean region.

After contextualizing international and continental trade, it is advisable to define the regional production chains, which much of the literature also calls Regional Value Chains (RVCs).

The Secretary General of the Andean Community (2021) considers the RPCs are a more limited version of the global chains, in which "region" refers to the nations or countries gathered under common integration and/or free trade agreements. On this basis, the concept of RPCs - as part of the insertion into the regional blocks that are part of the global production network or the above-mentioned mega factories (North America, Europe and Asia) is excluded.

The study by Amar & Landau (2019) published by ECLAC, provides an interesting perspective regarding Regional Chains compared to Global Chains. In the case of Regional Chains, the study argues that the creation of added value materializes when a service or product crosses at least two national borders during its production process and, therefore, involves productive activities in at least two countries within the same region. The destination of these Regional Chains can countries of the same region, as well as other countries of the world. This perspective differs from conventional definitions, which consider that Regional Chains only exist if their final destination is also in the same region. This last definition would exclude the majority of Latin American chains from being considered as such.

The common characteristics of the economies of Colombia, Ecuador, Peru and Bolivia (that is also part of the CAN) are:

- All countries have large sources of natural resources.

- Most of the exports from these countries are natural resources.

- The member countries are exporters of mineral-energy and non-energy goods, as well as some other commodities and commodity-based manufactured goods. In Colombia 70%, Ecuador 87% and in Peru 78%

of total exports refer to this type of goods.

- The main trading partners are China and the US.

As for goods exported by these countries, in Colombia crude oil and thermal coal prevail; in Ecuador crude oil, crustaceans and bananas; in Peru, copper and concentrates, gold, petroleum oils, as well as various fruits (General Secretariat of the Andean Community, 2021).

Lima & Zaclicever (2013) report that industrial trade relations between CAN countries (which have grown in the last 15 years) are evident in the exchanges with Colombia, i.e. between Colombia-Ecuador and Colombia-Peru, but not between Ecuador-Peru. These trade relations reveal certain levels of integration between the production processes of CAN and PP countries. However, it is important to identify what type of production or integration linkages these trade relations represent, known as "export linkages".

There are two types of export linkages: Backward linkages (BL), which reflect the (percentage) value added in the exports of countries and sectors that are of foreign origin, and Forward linkages (FL), which represent the (percentage) domestic added value in exports, which is transformed in the country of destination and re -exported again. Both categories can account for the levels of productive integration, based on which we will describe the export linkages.

Regional Production Chains in the Andean Area (study of 3 cases)

Palm Oil Regional Production Chains in COLOMBIA

The African palm oil (Elaeis Guineensis) is one of the most productive families of oilseed. In Colombia cultivation began in 1957, but was introduced to the Department of Magdalena in 1945 by United Fruit Company.

Palm oil production is one of the most important RPCs in Colombia. In the global production ranking, Colombia is the fourth global producer (only surpassed by Asian countries) and the first in America. Palm crops cover about 70% of the Colombian territory, i.e. 21 departments of the country and extending across some 161 municipalities.

The Ministry of Agriculture & Rural Development (2020) reports that palm production brings together about 6,000 producers and about 4,200 small-scale palm growers, which means that this sector reports numbers of interest for agribusinesses. In 2018 the palm oil industrial link had some 170,000 employees, including direct and indirect jobs (for every formal job there are 2.5 informal jobs, for every 7.5 hectares planted) (Ministry of Agriculture & Rural Development, 2020) .

Palm production is known internationally as one of the most efficient crops, an oilseed with the highest yield of vegetable oil per hectare, compared to other crops such as soybeans and canola. However, this crop recorded the lowest prices of the entire decade during 2019, imports of crude palm oil in the region also declined by 50%, due to Colombia's production linkage with the neighboring Ecuador. (Ministry of Agriculture and Rural Development, 2020)

The regional palm oil chain is organized into five fundamental links, with different weights and values that are added to the production process, which are:

1) Input Suppliers, consisting of processed goods and refined olein

2) Production, in which federations of oil palm producers, multinationals and producers' organizations coexist

3) Transformation, which brings together some 69 palm oil and raw palm kernel extraction plants

4) Marketing, which brings together business groups of the food industry, biodiesel, and exporter entrepreneurs;

5) Consumption, which can be offering refined goods and olein (Ministry of Agriculture & Rural Development, 2020).

As for the domestic market, palm oil distributes its production mainly into two segments: the first to the food industry, accounting for 53%; the second one is the palm oil used for biodiesel, accounting for 42%. Exports account for 42% of Colombian palm oil production, the destination of most of which is Europe, whose largest recipient is Holland, which receives 39.9% of the total exports, followed by Spain and Mexico.

Although most of Colombia's palm oil production chain links are located in the same country, Colombia also imports crude oil from Peru and Ecuador, and the latter is its largest supplier. Imports are for re-exporting purposes or for the manufacture of oil and fat industries that may require other types of vegetable oils (sunflower or soybean) to mix and make it suitable for human consumption.

As a sufficiently developed production sector in Colombia, its association of producers is strong and one of the most important groups is the National Federation of Palm Oil Growers (FEDEPALMA) which brings together small, medium and large producers, and is established as a business association par excellence. Also the Palm Oil Research Center Corporation (CENIPALMA) is the research and outreach unit for the sector.

Working conditions in the sector are precarious, including exhausting work hours, frequently without any regulation or surveillance. Similarly, unfair wages and precarious health and safety conditions are notorious due to exposure to multiple risk factors, a characteristic shared by the industrial chains of the same sector, located in South America and Asia Pacific (CNV International).

In Colombia, the production chain is organized in a way that has a strong impact on workers' health, due to the wear and tear they accumulate, the growing and sustained intensification of the production process, the unfair forms of remuneration and labor outsourcing. All this as a result of the core business of the sector, which is to

increase competitiveness and gain advantage over the daunting Asian industry (Indonesia and Malaysia), which has supremacy in the palm industry worldwide. (Gallo et al., 2020)

Palm companies continue to measure competitiveness in the amount of fruit collected per day of work, with the persistence of piecemeal payment method (which is generalized in almost all chains of the agro-industrial sector). This payment is calculated based on the amount of oleic acid incorporated in the harvested fruit. This entails psychosocial risk factors, ranging from pressure to increase the workload volume to ensure the minimum payment of piecemeal work, to the need to conceal ailments, feelings or opinions due to the burden of work.; In addition, the low cognitive demand of the tasks makes it monotonous and exhausting for the workers (Gallo et al., 2020).

Workers of the sector are exposed to high temperatures in the field due to the sun, more so those who are near the boilers, which increases the thermal stress and the possibility of heat stroke, a climate risk factor. Similarly, exposure to pesticides, caustic soda and benzine, which are important chemical risks (CUT Colombia et al., 2020).

Banana Regional Production Chains in ECUADOR

Banana belongs to the order of Zingiberales, a giant plant that develops in tropical climates and leaves that grow in a spiral shape. They belong to the Musaceae family and their fruit is the banana, a global staple food that provides high nutritional level to millions of people.

The banana industry is one of the oldest in Ecuador and the most important production chain of the country. As of 1950 it became the flagship product of the country's modernization. Banana exports represent 2% of the overall GDP, and just over a third (35%) of the agricultural GDP. Until 2013, banana production, as well as the related industries, generated jobs for more than a million families, and benefited some 2.5 million people, representing 6% of the total population of Ecuador. According to data of the Ministry of Foreign Trade, 2017, it is important to note that Ecuador is the main exporter of bananas worldwide.

Based on data of the Ministry of Foreign Trade, 2017, we know that until 2017 Ecuador had about 162,236 hectares of planted bananas and about 4,373 producers, classified as follows: small producers (owning 0 to 30 hectares) that plant about 35,686 hectares, medium producers (owning 30 to 100 hectares) that plant about 57,486 hectares, and large producers (owning 100 or more hectares) that plant 69,064 hectares. Producers are mainly concentrated in the provinces of El Oro, Guayas and Los Ríos, which account for 41%, 34% and 16% of the producers, respectively.

In 2002, Ecuador recorded some 237,000 cultivated hectares, a figure that decreased to around 167,000 hectares in 2021, which was compensated by the rise in yield (boxes per week). The pandemic affected the sector considerably in 2020, but it quickly recovered.

The Food and Agriculture Organization of the United Nations (FAO) (Arias et al., 2004), indicated that two banana production systems coexist in Ecuador, one technical that employs 0.9 workers per hectare and another more rudimentary one that employs about 5 workers per hectare.

The chain has five links, which are the same as those of the palm oil chain, with the obvious differences:

1) The provision of inputs or suppliers, which consist of agricultural inputs and technical services, for example the acquisition of agricultural machinery and tools in which financial services and business associations intervene

2) Production, in 167,000 hectares divided into three large regions, where the small industries of activities related to the chain participate (cardboards, inputs, fumigation)

3) Transportation, which is the logistical link to transfer to the domestic market or to export, in the latter case, Ecuador has the main ports of Guayaquil (through which 75% of fruit production leaves), and Puerto Bolívar (with 25%), in addition, a fundamental stakeholder are the exporter firms and production certifiers

4) Marketing has three destinations: supermarket and wholesale chains in the country itself, and exports to Latin American countries such as: Argentina, Chile and Paraguay (especially second-class bananas), and export to the US, Europe and Middle Eastern countries (vendors are in charge of

importing and ripening the fruit as well as selling it)

5) Consumption, distributed throughout the destination countries of the countries (García Saltos et al., 2016).

Taking into account data of the World Trade Organization (2015), total banana imports represented 20,642,995 tons worldwide. The United States was the main importer of approximately 15.5% of the total production, followed by Belgium with 10.7% (which also exports bananas, without --its own production, to neighboring countries such as Germany and Russia, as well as to China).

The banana production chain functions as an oligopsony structure: a small number of demanders of the product, which cause the power and control to accumulate in the buyers, that are almost always intermediaries. In the case of the banana production chain, this role of control is exercised by the exporters, represented by corporations such as Chiquita (United Fruit Co.), an American company positioned as the lead producer and trader; FYFFESS PLC, an Irish company acting as the main fruit distributor of Europe; DOLE (Standard Fruit Company), the second largest American producer and trader of bananas worldwide; DEL MONTE, also American and third in the world; and Bonita (Bananera Noboa), an Ecuadorian company owned by the Noboa group globally ranked as fifth, the largest producer and exporter of Ecuador (García Saltos et al., 2016).

It is clear that large banana exporters today are also producers. This not only gives a handful of economic conglomerates the hegemonic power of the production chain, but also the control of arable land (43%), as well as the trading of the chemical and technical inputs required by the industry, imposing the conditions on small producers. Therefore, in this chain - as in numerous cases of the agroindustry - there is a relationship of subordination of small and medium producers that are at the mercy of market fluctuations, forced to sell their lands or fall into debt with these economic conglomerates. Even worse, in the event of any decline in the export price or rise in production costs, the consequence is borne by small and medium producers, leading to precarious working conditions and low salaries (FES ILIDIS & Institute of Ecuadorian Studies, 2022).

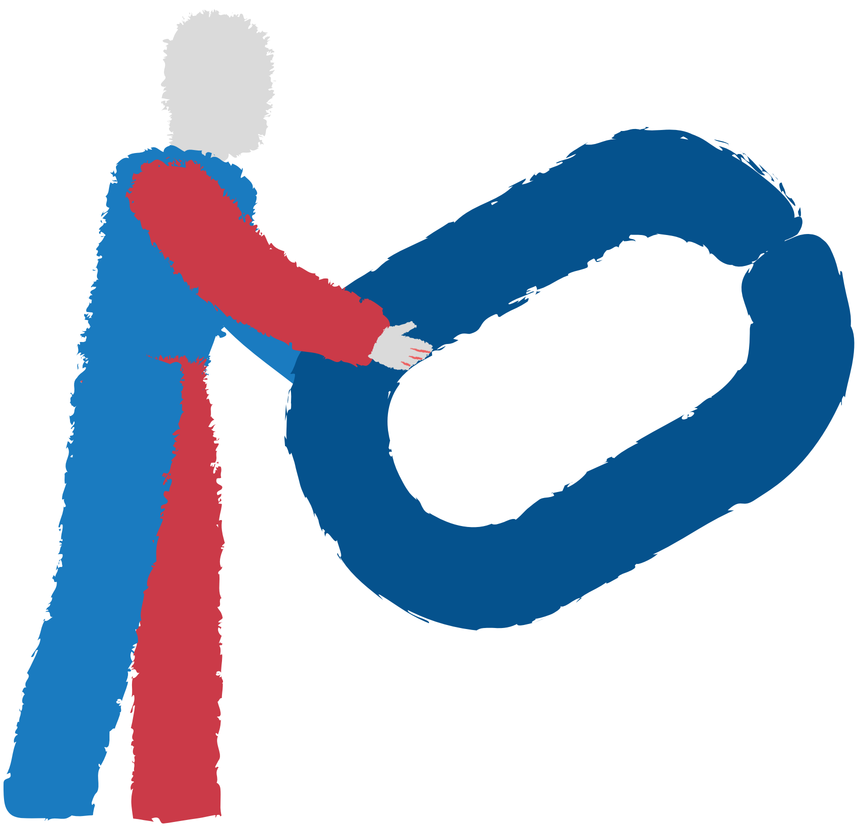
As in the palm oil production chains of Colombia, excessive work hours also affect the Ecuadorian banana industry. According to an investigation carried out by FES ILIDIS & Institute of Ecuadorian Studies (2022), the majority of the workers interviewed worked between 10 and 12 hours and between 5 to 6 days per week. In addition, when the minimum tasks or production goals are not met in time, they must extend their workdays to achieve them, or rely on their families for this, hence, child labor on farms was reported in 2010 with 14% of workers surveyed stating that they had started working when younger than 17 years of age.

A fact that conditions the labor reality of workers is the unfair "salary" recognition. In addition to the low amount paid for their work, the payment for productivity modality ends up in their overexploitation; this supported by the fraudulent collective agreements promoted by

employers', which changed the salary modality for payment for productivity in some companies and then, with the complicity of the State, it was used as reference for the rest of the sector, according to complaints of trade union leaders of the Trade Union Association of Agricultural Banana & Campesinos (ASTRAC).

Exposure to pesticides of a different nature is another element that represents a chemical risk to the health of banana workers. Although there are few scientific studies on the relationship between occupational risks and working conditions in the sector, diseases associated with exposure to these chemical agents are frequently reported, such as Mancozeb (one of the most hazardous pesticides used in the industry), as the absence of protective and safety equipment for workers is common. Regarding Mancozeb, it has been related to thyroid damage, negative effects on the neurological system and it is a possible carcinogenic for humans (FES ILIDIS & Instituto de Estudios Ecuatorianos, 2022).

Other practices such as sexual harassment by foremen and administrators of women workers are common along the chain, as well as gender inequality in remuneration, as well as the violation of trade union freedom of association, which ranges from sabotaging the legalization and registration of trade unions to death threats to trade union leaders (FES ILIDIS & Institute of Ecuadorian Studies, 2022).



Mining Regional Production Chains in PERU

Peru is a country with extensive mineral reserves, and historically the country has taken advantage of this potential. The installation of an industry to exploit and extract these minerals has made Peru the top producer in Latin America of zinc, gold, lead (Cornejo Díaz, 2018) and the second producer in the world of zinc, copper and silver.

Peru also has the largest silver reserve in the world. It is the third country with the largest zinc reserves, and the fifth country in gold and lead reserves. In Latin America it occupies first place in reserves of gold, silver, zinc and molybdenum; second place in reserves of copper and lead; and third place reserves of tin.

For 2015, the mining and hydrocarbons sector experienced a growth of 9.3% due to the exploitation of copper in the Antamina, Toromocho, Antapaccay Cerro Verde deposits and the beginning of the operations in Constancia and Las Bambas.

According to the Ministry of Energy & Mines, 2022), mining production registered positive variations, after the restrictions that were imposed in the context of the Covid-19 pandemic. In this sense, the production of copper, silver, zinc and tin showed increases of 4.8%, 3.1%, 0.2% and 3.0%, respectively, over what was recorded in 2021. Similarly, the production of iron rose by 6.5% compared to 2021, due to the production of Shougang Hierro Perú S.A.A., which contributed at least 98% of total production.

The entire mining dynamics of the country cover 21 of the 25 regions of the nation, pointing to the decentralization of production as required to close social and economic gaps. However, despite the great economic advantages provided by the sector in the area of taxes, foreign currency and investments, the negative perception of the population to mining has not changed in recent years: it may be a consequence of the evident inequality in the distribution of the impacts produced by mining at a socio-environmental level, leading to high intensity conflicts in relation to extractive corporations (Cornejo Díaz, 2018).

During 2022, the value of Peru's exports was 65,835 million, of which 37,711 (53.3%) belong to non-metallic mining products, the total of metallic and non-metallic mining products was 38,803 million, which accounted for 58.9% of national exports. This reaffirms the sector's position as the one that most contributes to the country's trade balance, as well as the most important source of foreign currency (Ministry of Energy & Mines, 2022).

The main destinations for Peruvian mining are located in China, which buy 34% of the production; Switzerland with 12%; United States with 10%; Canada with 6%; the Republic of Korea and Japan with 5% each; and India with 4%. In the case of China, Peru trades copper, tin, iron, molybdenum, gold, lead and zinc. It exports gold and silver to Switzerland. Regionally, Peru exports mining goods mainly to Chile and Brazil, which account for only 1.5% of its exports.

The Mining Regional Production Chain is distributed as follows:

1) Exploration, is the prospecting, analysis of evidence and interpretation

2) Development, is the modeling of the deposit, selection of the appropriate mining technique and development of construction projects

3) Extraction, are the open pit and underground activities, drilling, blasting, loading and transportation

4) Processing, is the crushing, concentration, smelting and grinding, as well as electro refining

5) Sales, involves trading in metal markets and to clients with contracts (Cornejo Díaz, 2018). The logistics and transportation of the production chain targets international markets, consequently, it adopts a multimodal mechanism: ports, airports, roads and railways that ensure departure from the country and arrival at destinations.

For 2022, according to the Ministry of Energy & Mines, (2022), Peruvian mining experienced an improvement in the employability figures in relation to 2021, year in which the work had leveled out as a result of the restrictions caused by the pandemic; this means a significant recovery. At the close of the year, mining generated an annual average of 231,479 direct jobs, accounting for an increase of 6.8% in relation to the number of jobs in 2021, and 21.7% above the 2019 data, i.e. before the pandemic.

In 2022, of the total number of workers in mining corporations (68,444 in total), only 29.6% were direct employees. Contracting, outsourcing and related corporations reported the remaining 70.4%.

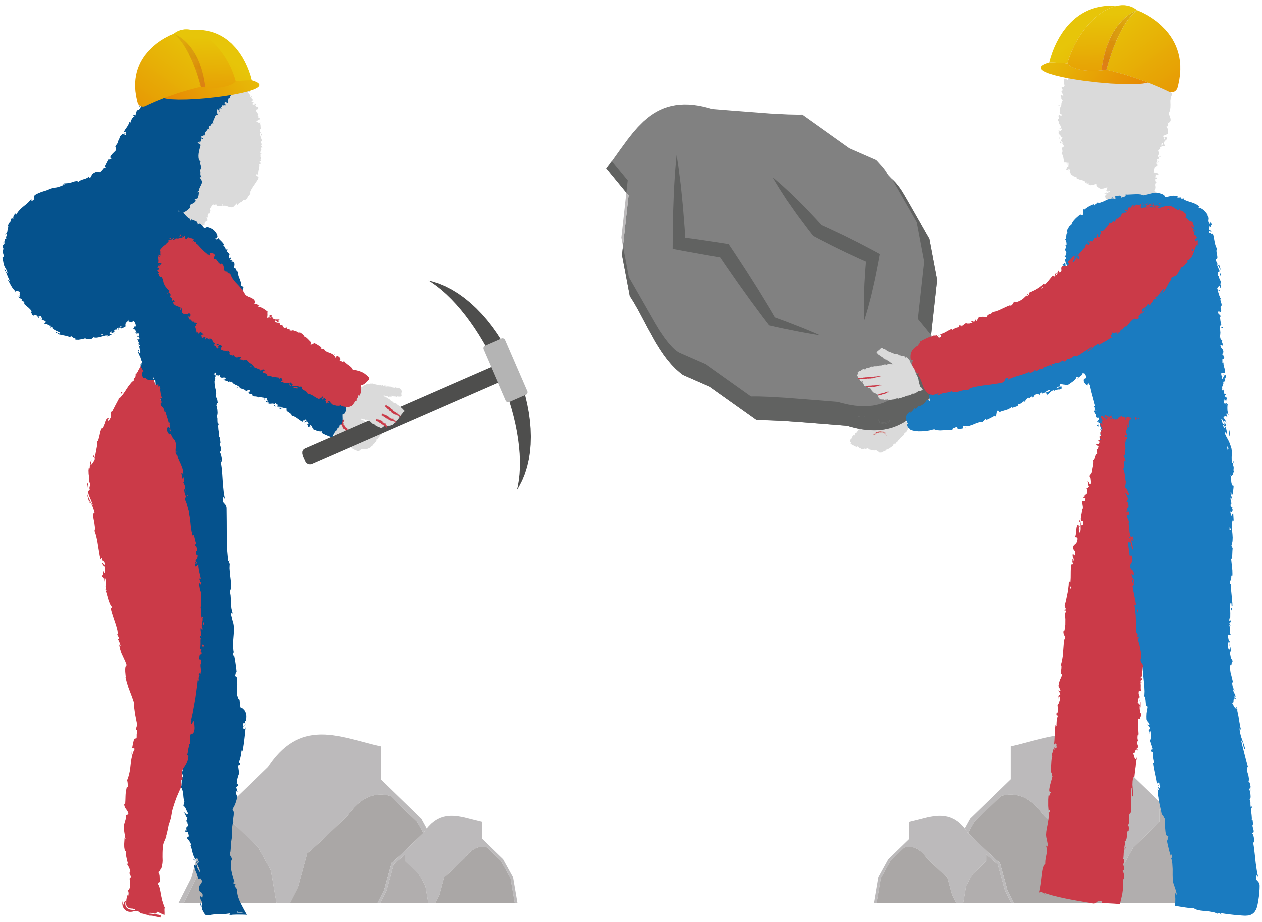
The Statistical Mining Bulletin (Ministry of Energy & Mine, 2019) shows the most representative mining exploitation corporations of Peru. The subsidiaries of foreign corporations are notorious in the exploitation of copper, concentrating 78% of national production: Freeport. Mcmoran, MMG Limited, BHP Billiton, Southern Copper and Glencore. Among the silver producing corporations, three corporations concentrate more than 40% of national production (two of them have Peruvian capital): Compañía de Minas Buenaventura, Compañía Minera Ares and Antamina (its shareholders are BHP Billiton and Glencore).

The most important foreign and national gold trading corporations are: Yanacocha, which hosts Peruvian investments such as Buenaventura and foreign investments such as its partner Newmont Mining. Barrick is the most important gold producing company in the world, as well as the Consorcio Minero Horizonte with national capital.

Labor relations in mining production chains in Peru are strongly marked by labor conflicts between mining corporations, workers and the State (Rivera Alvarado, 2022). One of the reasons for these labor conflicts are the long daily hours that go beyond the regulatory 8 hours. For example, workers of the Antamina company work 10 days in the camps and rest 10 days. Another cause of tension in the mining world is outsourcing, which represents just over 70% of the total number of workers, through hires and the like.

Trade unions have mobilized to repeal the outsourcing law, which provides a legal framework allowing the violation of freedom of association and which is used to replace direct workers with indirect workers. This widens wage inequality between them (Rivera Alvarado, 2022). Additionally, multiple accidents occur in the mining sector, some of which are fatal, such as 2019 which recorded 40 fatal accidents. Of these, 25 workers belonged to the contracting companies.

Keman Ozkan, Deputy Secretary General of IndustriALL Global Union, at the International Labor Conference (2013), pointed to the abusive use of employment relations in Peru, especially the outsourcing and temporary contracts that are signed in order to evade responsibilities vis-à-vis workers. He also pointed out that subcontracted workers are prisoners of the mining sector because the company that employs them and the contractor that pays their salary create a situation of defenselessness for workers who are not able to join a trade union, much less bargain collectively, and so they are treated as second-class workers. He also added that those who attempt to unionize are harassed, pressured to accept bribes, are fired and even prosecuted (IndustriALL Global Union, 2023).



Comparative Analysis between RPCs and GPCs

The description covered in the previous chapters gives us the idea of the fairly tenuous trade integration of the regional chains in Latin America. Most of the regional integration programs proposed for the countries analyzed in this report, such as the CAN and PP, as well as other integration programs promoted by nations of the South, such as MERCOSUR, recognize that, although there are trade and production chains between the countries of the Andean region and with other countries of Latin America and the Caribbean, these links are still incipient (Amar & Landau, 2019).

It is important to underscore that many of the regional production or value chains are linked and/or integrated into global production chains. It is not possible to conduct an analysis completely separating the categories of global production chains from those of RPCs, since the majority of existing regional chains, in one way or another, purchase inputs, machinery or sell their produce in countries outside of the Latin American region.

For example, in the cases studied in the Colombian palm oil chain, despite the trade of inputs with Ecuador, the commercialization link is located in Europe. The case of Ecuadorian bananas is similar, selling and consumption are located outside Ecuador, and also outside the continent. The same is repeated in the Peruvian regional mining chain.

We cannot deny that efforts are made by the subregional integration programs and agreements to promote integration, trade and the strengthening of regional chains that provide greater added value to their exports, nor can we state that there are no regional chains that are not integrated into global chains; however, these are not representative of any of the sectors or do not have the economic status to make them continental points of references.

Working Conditions in the Different Production Chains

In the publication "Global Production Chains & Trade Union Action", the Trade Union Confederation of the Americas (2017) pointed out that the GPCs relate to the increasing precariousness of work, i.e. the development and reproduction of informal work, the atypical forms of employment and the use of intermediaries. Similarly, the lower links of the chain show other problems, such as child labor and forced labor, as well as the presence of discrimination or the absence of social protection for migrant workers.

Also, as part of the working conditions, there is the practice of debt bondage, acts of violence in the workplace, multiple prices for meeting the productivity quotas, in addition to poverty wages, and lack of health safety, job security and the absence of trade unions in some cases.

Below the main working conditions in the RPCs of the Andean countries, despite the existing variability and their qualitatively different expression.

It is important to note that there is scarce literature or specific studies on working conditions specifically in regional chains. Nonetheless, based on the scarce literature and contact with the organizations, it is possible to identify those conditions that can be considered "generalizable" to the rest of the regional chains:

- **Hiring:** ESometimes, RPCs are mediated by employment relationships that are not formalized and this can have a clear impact on wages and access to basic labor rights. A large number of subcontracted workers are visibly vulnerable compared to their regular peers, who have access to higher salaries and rights granted by law.

In the case of banana workers, many do not sign contracts despite working for considerably long periods of time. A minority signs contracts, but are unaware of the terms and modalities, as they are not informed until they are fired, causing confusion.

- **Salaries:** As in global chains, salaries are quite low, especially for workers who work in the links with mostly manual work and least value added to the product. In most cases, these salaries are not even close to each country's basic basket. In some of the regional agro-industrial chains, the classic salary vanishes to be replaced by forms of remuneration paid per productivity criteria, generating instability and hyper exploitation to fulfill the minimum goals.

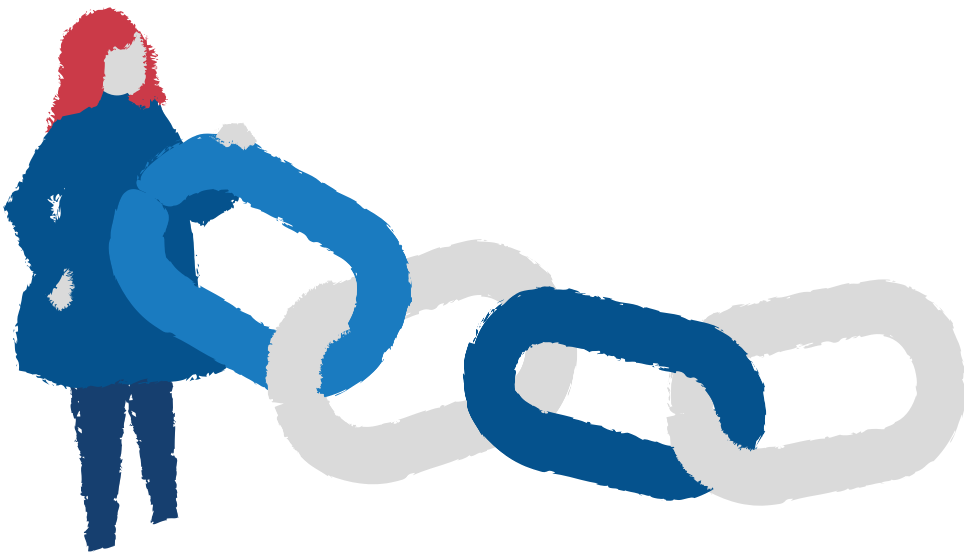
- **Workdays:** The escalation of work and the extra working hours are an unfair condition that persists in both global and regional chains. In some sectors it occurs much more frequently than in others, for example, in agricultural sectors it is linked to the goals and payment for productivity, both in the above cases of palm oil in Colombia and bananas in Ecuador, work is longer than 8 hours, workers' shifts can be of 10 to 12 hours and, in less representative cases, the shift can be of 16 hours.

- **Freedom of Association:** Many of the most important regional chains have legally established trade unions, although it is an achievement that has required sustained efforts and struggles to confront the resistance of the regional companies. For example, in the case of bananas in Ecuador, ANTRAC confronted State resistance and the sabotage of employers against their unionization, which finally happened after 10 years of struggle.

- **Gender Gaps:** Women are exposed to multiple inequalities, with contracts and salaries worse than those of their male peers in the primary links of the rural production chains. They are subjected to links in the chain

such as processing and packaging, which require less skilled labor, and they are victims of sexual harassment. The situation is similar in regional chains, mainly in the agro-industrial ones. There are reports of sexual harassment by foremen of ranches and unequal payment with the excuse that their work "less strained" than men's.

- **Health and Safety:** Exposure to risk factors that cause occupational diseases and labor accidents is a most pressing situation in RPCs. In the case of mining, mining is classified as one of the most hazardous activities, with the highest risk of accidents. Compared to other sectors, work-related mortality statistics are considerably high in the Peruvian mining industry. In the case of the palm oil and banana industries, morbidity statistics are almost non-existent and scarcely studied; however, the appearance of musculoskeletal diseases, respiratory issues, among others, suggests that exposure to physical risks (excessive and inadequate administration of cargoes), chemical risks (due to the spraying of pesticides on plantations), and psychosocial risks (due to the daily pressure to meet goals in order to be paid), has important consequences on workers' health.



The Development Possibilities of National Companies

Considering the above, we ask: Is it possible to achieve the economic development of national companies based on the existing RPCs? To answer this question, we need to resume certain analyses of Latin America as a dependent region and its role in the international division of labor and the structural conditions of its foreign trade. This has different implications for global production chains and for RPCs. Therefore, we need examples, taking into consideration the cases of Colombian palm oil, Peruvian mining and Ecuadorian bananas.

First, it is important to highlight that Latin America has been conditioned to produce and export the vast majority of its commodities and raw materials. With some exceptions, this situation is historical (since the onset of the "modernization" of LAC countries at the beginning of the 20th century) and it is also part of the role assigned by the capitalist system in the international division of labor, where far from ebbing, is accentuated (ECLAC, 2020).

Despite the relocation of manufacturing in the world from the Central-Western countries to the countries of the Global South, this did not automatically translate into transfers of technology to national companies or the development of heavy industries in our countries. Seeking to expand production frontiers, profitability, and incorporate entire regions into their production circuits (Mariano Treacy, 2021a), transnational enterprises settled in LAC countries, influencing the rules of production and trade, generating dependence on the centers of economic power and promoting the unequal development of economies (Amin, 2010).

This international division of labor placed the fragments of production linked to the need for cheap labor, the possibility of increasing the workload, trade union weakness and access and extraction of natural resources in the dependent countries (periphery of the Global South), and the segments linked to the manufacture of more sophisticated and high-tech components (Mariano Treacy, 2021a) in the hegemonic countries (centers or Global North).

In this regard, for global production chains, the development of local companies is only possible based on the rules of economic dependency, on the conditions permitted by the role assigned to Latin America as exporter of raw materials of some manufactures, i.e. everything within that center-periphery relationship in which trade relations are accepted. Therefore, the "development" of local companies is possible only if it is limited to the assigned sectors and to competition arbitrated by the rules imposed by transnational capital.

The situation does not change in any substantial way for regional chains, which are based on the same logic of dependency and also linked to global chains. Despite this, other variables appear more strongly, such as the role of national entrepreneurs regarding exports, international competition and the development of State policies to protect the national production matrix.

If we look into the three cases of regional chains described above, each one has an important position in terms of production in the countries where they operate. The three production activities relate to exporting commodities, some agro-industrial and the other one mining, and their destinations are in countries of the North. In the case of minerals and bananas, these central countries provide added value to re-export the goods to other countries.

Among the most important companies of the chains we researched, national companies are not in the top positions, nor are they the majority. They are transnational enterprises or foreign consortiums that control the production and extraction, and start owning the land and dominating the commercialization of chemical inputs (in the case of agri-food production chains).

National companies are forced to relate or to partake in global chains as suppliers of commodities, while the links in the chains that add value or that commercialize are basically transnational centers of economic power, i.e. the majority of transnational and monopolistic economic groups exercise control.

States compete to attract more foreign investment from these transnational and monopolistic economic groups, making their tariff barriers more flexible and proposing fiscal facilities to the detriment of the internal consolidation of national companies. We could say that the development of national companies, as part of the RPCs, are not exempt from the conditions imposed by large global production chains and the dependent market economy, as described in the theory of dependency (Mariano Treacy, 2021b).

State Capacity to Regulate

In the case of Colombia, in 2007 the Congress enacted Law 1133, which included the development of a program to reduce the negative effects on the agricultural sector of the Free Trade Agreement with the United States. This program included direct economic aid to improve productivity and support the reconversion of the agricultural and livestock sector, credits and incentives, technical assistance and improvement of the livestock health system. It favored large consortia, including those in the palm oil sector, to the detriment of medium and small ones, for which it was harshly criticized and replaced in 2011 with another program (Rueda-Zárate & Pacheco, 2015).

In 2011, the Ministry of Commerce, Industry & Tourism developed a program for the transformation of production and the integration of agricultural and agro-industrial sectors, to take advantage of the internationalization of the economy and foster exports. This plan allowed the oil industry to reduce the cost of logistics and increase the share in the international biodiesel market, in order to respond to the high level of national competitiveness in the oil and fat sector (Rueda-Zárate & Pacheco, 2015).

The accelerated growth in the palm oil area in the 2003-2013 period is the result, among others, of State incentives for the agro-industrial sector (tax incentives, access to land and others) and the internationalization of the economy, which fortified the industry's exports. It is also important to note the development of the USAID investment program to establish palm crops in almost 60,000 hectares in 10 municipalities, as part of the US international cooperation policies to replace illicit crops (Rueda-Zárate & Pacheco, 2015); (Institute for Development & Peace Studies, 2013)

In Peru, the mining regulatory framework began in the 90s with the Mining Law and the Investment Promotion Law. At the beginning of the 21st century, new legal instruments were approved to increase State income and fiscal progressivity, through new special taxes on mining extraction and exploitation (Poveda Bonilla, 2022).

At present, political instability and deep social unrest have prevented the reconsideration of the current tax regime and the use of the mining income, not allowing the legislative reforms necessary to increase the State's share in the income (Poveda Bonilla, 2022)

In the case of Ecuadorian bananas, as regulator, the State created various agencies to control and solve issues relating to production, commercialization and exports. A most critical aspect has been the establishment of the official price of bananas, a measure repeatedly established but never fulfilled, and which has finally been established according to international supply and demand, affecting producers (Figueroa & Espinel, 2000).

Differences in Trade Union Presence and Action

In Peru, the country's mining organizations are part of the oldest points of reference of trade unionism. The mining trade union (FNTMMSP) of the CGTP federation brings together some ten trade unions and represents some 22,000 workers in the country. Together with other trade unions, they are discussing how to move from classic trade unionism per company to transforming into trade unions per sector, which would qualify their struggles and provide greater adaptability to the fragmentation imposed by employers (FNTMMSP, 2017).

Although there is a decline in the trade unions of the palm industry, as a consequence of the repression and persecution of leaders, the presence of trade unions in the sector is notable, with CUT Colombia as the federation that encompasses workers of the Palm Regional Production Chain. An important aspect regarding trade unions is that, until 2022, when the Palm Assembly was held, the demands and struggles of trade unions were dispersed, compared to employers unified in a single business association: Fedepalma. Hence, the importance of the creation of the Palm Coordination Commission, to consolidate and unify the struggles.

In the Ecuadorian banana sector, trade union organizations are weak (even absent) to place their demands before the employers' association. Most of the conflicts addressed by trade unions focus on demands to State institutions, and not so much to employers. Conflicts against employers and their policies are often conducted by ununionized workers. Herrera Revelo (2019) characterizes this situation as a "union vacuum" and can be explained by the following causes: the left lost organizing space after the 1980s in rural areas; violent practices on the plantations against the workers and trade unions; neoliberal reforms of legal regulations. All this hindered the formation of new trade unions in rural areas and in the private sector. As a result, Ecuadorian unionism is concentrated in the public sector (80%)

and trade union presence in banana production chains is almost non-existent. There is a trade union structure called the National Federation of Agroindustrial Workers, Campesinos & Free Indigenous People of Ecuador (FENACLE), which has lost significance and been dismantled as of its alliance with the government in 2019; and the Trade Union Association of Agricultural Workers & Campesinos (ASTAC), despite not legalized until recently, appeared on the scene as a novel strategy.

Regarding trade union presence, in general, global production chains have more coincidences and/or similarities than differences in relation to regional chains. Upon a comparative analysis, we highlight the following differences:

- In the GPCs, analyses and institutional efforts are created to diagnose, problematize and generate impact on their governance, in relation to the working conditions in the most precarious linkages. However, Latin America is weak. As the States promote regional integration and interregional production linkages, discussion and social dialogue are needed for coordination between trade unions per sector, with the same weight as trade agreements or pacts: MERCOSUR, Pacific Partnership or Andean Community of Nations.++

- One of the critical issues of the contemporary trade union movement is union membership. In the GPCs we identify robotics-based automation, which transforms the nature of work and the attitudes or skills required for jobs. In the case of the RPCs, although technology and automation are now being incorporated due to their connection or link with GPCs, this reality is more evident in the processes and outputs of the Latin American region (union membership issues are caused by other factors).

- In the GPCs, the international structures of trade unions have allowed the grassroots to come into contact and coordinate with trade union grassroots of the same chain in other countries; in the same way, the creation of international trade union federations per sector has allowed trade action union to acquire transnational characteristics. However, the RPCs discussed in this paper, and in the rest of Latin America, have little access to connections between producers and between trade unions of the same region or of the countries of destination of the goods that would allow them to put transnational pressure, mobilize and advocate interregionally and internationally, in other words, there are few interregional trade union actions in the linkage sectors.

Are there differences between RPCs and GPCs?

The answer to this question is not simple; however, we can identify different perspectives. As we have seen, RPCs are linked to GPCs whereby they reproduce the same logic and rules downstream from the centers to the peripheries. This could change in the future only if the agreements and alliances between Latin American countries are consolidated, and more important and robust intraregional linkages start to be developed, bringing about a new rationale for exchange, linkages, foreign trade to consolidate regional integration, both of national companies and States, as well as of the working class and social organizations, providing greater autonomy from the decisions and rules imposed by transnational enterprises and consortia.

We can point out some differences between both expressions of production chains:

	GLOBAL PRODUCTION CHAINS	REGIONAL PRODUCTION CHAINS
SCOPE OF DEVELOPMENT AND ACTION	The action of the GPCs is global, its linkages can be distributed in countries of different continents.	In the RPCs, most linkages focus on 1 or 2 countries of the same continent or neighboring countries. Sometimes the trade linkages are located in central countries or countries of the Global North.
HEGEMONY AND GOVERNANCE OF THE CHAIN	Depending on the sector and the chain, in most cases, the economic hegemony of the GPCs is exercised by global transnationals that form real international monopolies or oligopolies.	Although in RPCs, transnationals exert an important influence on production and export processes, companies with national capital also participate, although not prominently.
BACKBONE PILLARS (ADDED VALUE)	• China • United States • Germany	Without prejudice to the influence of countries of the Global North, including the US, Germany and China, the RPCs show the prominence of countries of the region as territorial pillars or anchors (in the cases detailed in this report, each of the 3 countries is a pillar of the above-mentioned chains: palm, banana, mining.

Proposals and Actions of the Andean Trade Union Movement:

What are trade union organizations saying in Colombia?

In the palm sector, an important battle has been waged against the business sector that is part of the oldest conservative heritage of the country. There have been multiple massacres, violence has increased while the weight of collective agreements has declined, which has reversed in union conventions.

Francisco Maltés, former CUT president, at the 2022 Palm Assembly organized by the Palm Trade Union Coordination Commission, pointed out that the sector was experiencing times of determined employer resistance

to collective clauses, as well as persecution, murders and that violence against the unions was on the rise. Workers also witnessed how State investigations into working conditions did not prosper due to the sabotage of employers and the complicity of previous governments.

CUT Colombia decided to propose a labor reform to the new government, based on three decrees defending labor rights:

1) Decree on multilevel negotiation

2) Decree on collective reparation

3) Labor formalization.

Multilevel negotiation requires a negotiation per economic sector and per region to improve conditions because, although multilevel negotiation has been occurring in different sectors, it needs the rank of legal formalization.

At the Palm Assembly, the palm sector decided to build and present a single list of requests to the private sector in 2022, to mobilize and generate unity in the sector on the priorities of trade union struggles that are based on the needs of the working class and the demand for better working conditions.

What are Trade Union Organizations saying in Ecuador?

The ASTRAC trade union organization is seeking to stop the production and reproduction of occupational diseases in the banana industry. It has made efforts to study how exposure to the pesticides used in the industry affect workers' health, with the organization fighting for FAO to develop safety regulations for the banana industry.

According to ASTRAC trade union leaders, the banana trade union movement fights to reverse the sector's remuneration for productivity, which they consider undermines workers' dignity and quality of life. ASTRAC demands rights such as the daycare program for workers' children, which is not provided, and the right to collect the thirteenth and fourteenth salaries established in the legislation, whereby their struggle is based on these violated rights.

Another ASTRAC initiative has been to expand workers' membership to social security, which has increased from 40% to 60% of affiliated workers, a significant achievement given the conditions of extreme vulnerability and exclusion of banana workers. The trade union summarizes its priorities for action as follows

1) Demand the right to freedom of association

2) Defend the right to health at work

3) Demand the right to a living wage and gender equity.

What are trade union organizations saying in Peru?

In Peru, the most important trade union organization of the mining chain is the FNTMMSP, which has proposed a platform of struggle for the following:

- Development of a bill that includes the elimination of the profit-sharing cap, modification of the profit-sharing criteria giving greater weight to the time worked, guarantee of profit sharing for outsourced workers, and establishment of transparency and control of the calculation bases used by employers.

- Project to eliminate fraudulent outsourcing of services, to support outsourced workers who may be involved in this fraud from contract to contract without achieving lifelong job stability.

- Training and wellbeing projects for mining workers, creating recreational and sports opportunities, as well as strengthening health services at the national level.

In 2019, the National Federation of Mining, Metallurgical & Steel Workers of Peru started to negotiate per sector based on a national document that seeks to manage them in European countries where union strength is stronger, in unity with other sectors of workers, in order to gain more bargaining power in the defense of workers' interests (FNTMMSP, n.d.).

Subregional and Regional Perspectives of the Trade Union Movement regarding RPCs

The path that Latin American regional chains will follow will depend on the regional integration processes, and on how they coordinate effectively. On the one hand, there is the intention to articulate regional chains only as a way to increase their competitiveness in global chains. There is also the intention to strengthen regional chains as a way to invigorate regional integration and local economies. For the trade union movement of the Americas this requires deep reflection on the development perspective in the future.

The 4th TUCA Congress (2021) agreed on multiple important and valid aspects related to the development of labor perspectives on RPCs, some of which are:

1) The defense of democracy and, as part of its labor quintessence, the demand for freedom of association, collective bargaining and the right to strike

2) The strategic alliance with all trade unions and social movements

3) Multisectoral, social, ethnic, feminist and environmental human rights

4) Appreciation for the importance of institutional integration processes based on progressive values

5) Questioning the role of transnational corporations in the control of production chains and the commodification of nature in that context.

To conclude this report and taking into account these agreements of trade unions grouped into the TUCA, we put forth some perspectives as ideas for the trade union movement, as part of the Roadmap to Strengthen and Transform Trade Unions 2021-2025:

a) Generate actions to build and expand the union membership in the various sectors and links, especially of the outsourced sectors of regional chains, which account for a good part of the formal, yet precarious, sectors of most companies.

b) Generate specific transnational actions which incorporate trade unions of the same chain, located in the Latin American region, into their actions (also generating simultaneous agitation and mobilization between workers in different countries, who are part of the same chain). Reflect on transnational union action incorporating flexible (subcontracted) and deregulated (informal) sectors, which are part of the production chains.

c) Encourage trade union leaders to reflect, mobilize and act interregionally based on the integration structures (UNASUR, CELAC, MERCOSUR, Pacific Partnership and CAN, or those that they decide to promote) considering that, if these integration structures pursue community integration and development, they must include social organizations as well, such as trade unions and their continental and international expressions.

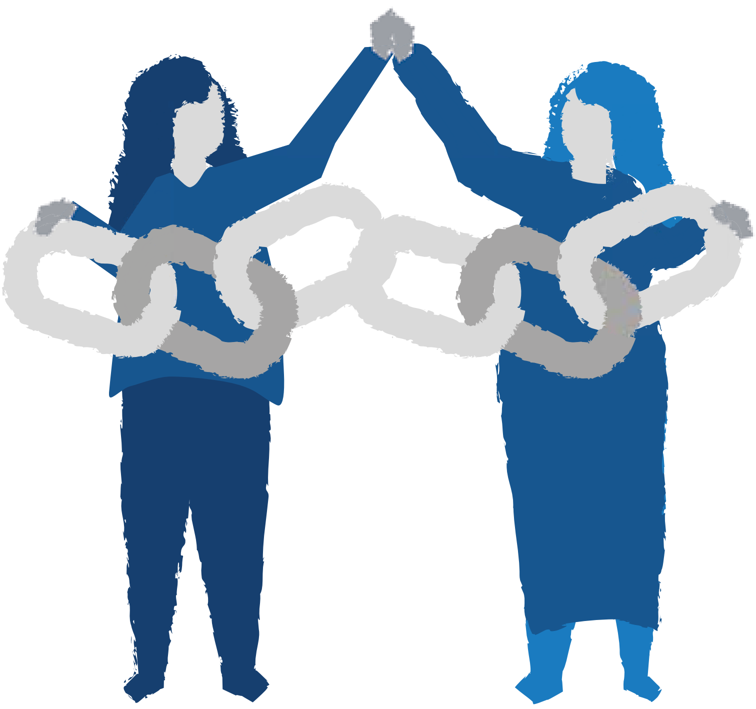
d) Remain actively close to the links between the trade unions and federations of Latin America with those of the parent companies of the chains usually located in Europe and other countries of the Global North, to put robust pressure on the transnationals hegemonizing the chains.

e) Build alliances and coordinate actions with Global Unions (IndustriAll, ICM, UNI, etc.) and the TUCA and ITUC, as regional and global labor organizations able to reinforce the action against transnational capital.

f) Participate and strengthen the construction of binding legal instruments, such as the binding treaty on transnational corporations and human rights (under discussion in the United Nations Working Group) and the implementation of other relevant instruments, such as the Escazú Agreement (Regional Agreement on Access to Information, Public Participation and Access to Justice in Environmental Matters in Latin America and the Caribbean).

g) Promote national regulations aligned with the binding legal instruments to hold transnational corporations accountable for human rights (Brazil's bill on the Framework Law is an important example).

Strengthen research and union training on GPCs and RPCs and transnational corporations. The experience developed by the TUCA Labor Observatory of the Americas is an important expression of this sort of initiative.



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