MANUAL FOR THE WAGEINDICATOR COLLECTIVE BARGAINING AGREEMENT DATABASE

5th DRAFT, 2013-01-14, Kea Tijdens, Amsterdam, Netherlands

Table of content

1 About this manual and the people behind COBRA

1.1 About this manual

This manual explains the features of COBRA, WageIndictor's global COllective BaRgaining Agreements database for the uploading and coding of the text of Collective Agreements. This manual aims at a common understanding among coders, uploaders, project coordinators, and others, how COBRA and its CB DATABASE works.

1.2 People
- The initial plan for the COBRA database came from Paulien Osse, director WageIndictor Foundation, who has also overall project management.
- The systems design was made by Kea Tijdens, University of Amsterdam.
- The technical design was made by Huub Bouma and Duco Dokter, Wyldebeast & Wunderliebe, Groningen
- The CB organisation for CB's, in Africa is based at the University of Dar es Salaam, Tanzania. Dani Crecon is project organiser for West Africa.
- Thanks go to Sanne van Zijl and others.

2 Introducing COBRA and the CB DATABASE

2.1 What is COBRA?

COBRA is a web-based system for Collective Bargaining Agreements database, here abbrevated as CB DATABASE, with an interface to generate web-pages with CB texts in the national websites of WageIndicator. Section 2 details the CB database. Next to the CB DATABASE, COBRA includes also a COUNTRY PROFILES DATABASE (see Section 4).

2.2 CBA full text

The aim of the CB DATABASE is to post CB full text and coded information on the national WageIndicator web pages. To do so, first CB texts are uploaded in the CB DATABASE, then meta information about the CB is coded, and finally the content of the CB is coded whereby relevant clauses are selected. Once a CB text is uploaded, a coder reads the text, using a coding scheme with questions about 9 topics. To facilitate the reading of the CB text and its coding, the coder uses a list of key words and a number of auxiary lists, as will be explained.

2.3 CB names

The CB DATABASE maintains a list of CB names. In case of consecutive CBs, the unique CB is identified by its name and operative date. The CB DATABASE links each CB name to prior and consecutive CB's, if these are also entered into the CB DATABASE. This includes linkages in case companies have merged or have fallen apart. A framework CB is linked to all related CB's. A transnational CB is linked to the CB's in all countries covered by this CB. The CB names are among others used for identification of CB's at the first CB web page (see Section 3).

2.4 CB meta information

The CB DATABASE includes the following meta information related to the CB:
- The name of the CB and the linkages to other CB's, in the CB DATABASE
- The nature of the CB (e.g. company, industry-wide, transnational, framework)
- Identification of annexes, which are formally not included in the CBA
- Operative and expiration dates
- The signatories to the CB: employers or their associations, trade unions, and if relevant professional associations
- The ratification process of the CB, if relevant
- The extension of a CB to employers who did not conclude the agreement, if relevant
- CB coverage (geographically, job types, industries)
- Number of employees covered, where possible broken down by gender
- Related PDF documents, if possible the CB signed by concluding parties

2.5 CB status

According to the start and expiration dates of the CB, its status is generated when the CB text is entered into the CB DATABASE. Five statuses are possible:
- To be operative
- Running
- Expired
- Replaced by newer CBA
- Terminated.

The status is generated automatically in COBRA by automatically comparing the today's date with the CB start and end dates. So, once the full text CB is posted on the national WageIndicator webpages,

COBRA checks at least once per day the CB, and changes its status if needed. Hence, a CB that runs from 1/1/2013 to 1/1/2015 has between these two dates the status RUNNING. On 1/2/2015, COBRA will change automatically the status into EXPIRED. If on 1/6/2015 a consecutive CB is uploaded, the status of the prior CB is changed automatically into REPLACED BY NEWER CBA. From 1/6/2015 on the status of the consecutive CB will be changed into RUNNING. Note that this is automatically done by COBRA. Yet, when needed, the status can be changed manually.

2.6   CB coding scheme

The ful CB text is coded accordig to a list of questions (the so-called coding scheme). These questions are grouped into nine topics:
- Topic 1: Job Titles
- Topic 2: Wages
- Topic 3: Working Hours, Schedules, Paid Leaves And Paid Holidays
- Topic 4: Employment Contracts
- Topic 5: Work And Family Arrangements
- Topic 6: Health And Safety And Medical Assistance
- Topic 7: Sickness And Disability
- Topic 8: Social Security And Pensions
- Topic 9: Training

2.7   CBA key words

The list of CB key words is used to highlight relevant words in the text of a single CB during the coding process. Highlighting is relevant, because it allows the coders to navigate quickly through the CB text, without having to read all text. Thus, the CB key words speed up the reading of the CB text and improve the quality of the coding. The CB key words are related to the questions in the coding scheme and they allow to navigate through the text by topic.

The initial languages of the CB key words are English and French. If CB's, in other languages are entered into the database, translations need to be added to the CB Key Words before coding the CBA.

2.8   CB highlighted clauses

In the process of coding a CB, the coder can highlight clauses that are relevant for the items ticked in the coding scheme. These highlighted clauses are linked to the ticked item, for example a clause on paid maternity leave. The most recent clauses are shown on a separate webpage (see section 3).

2.9   CB auxiliary lists

The CB DATABASE uses a number of auxiliary lists. These lists facilitate the coding of a number of question in the coding scheme. The CB DATABASE for example asks to specify the signatories from employers' side, showing the list of already entered employers associations. Any item of this list can be ticked, or a new item can be added. Hence, the list is growing whith each new CB entered into COBRA. These auxiliary lists fall apart into country-specific lists for the meta data, e.g. the trade unions, and not-country-specific lists for the coding sheme, e.g. types of leaves. The latter lists are available in English and French, and need translation if CB's in other laguages are added.

The following country-specific lists are in use for the meta data:
- List of employers' associations
- List of companies/ plants / multinationals
- List of trade unions
- List of professional associations

The following not-country-specific lists are in use for the CB coding:

- Categories of age groups, e.g. pensioners, youth under 18
- Categories of job types, e.g. unskilled workers, or cleaners.
- Categories of leaves
- Categories of shifts
- Categories of pay periods

Based on the CB coding, COBRA computes hourly wages, based on the number of working days per year. For this purpose, one country-specific list is in use:

- Bank holidays

In addition to the auxiliary lists, the CB DATABASE uses a few fixed lists. In these lists no new items can be added. This applies to the following lists:

- List of currencies; note that once the CB country is ticked, the CB DATABASE asks to confirm if the CB currency is that of that country; if not, the coder can identify the proper currency.
- The list of industries (coded according the NACE 2.0 classification); this is an existing list, whereby multiple industries can be ticked if needed.
- The list of regions, to be ticked in case the CB covers specific regions in the country; this is an existing list, whereby multiple regions can be ticked if needed.

2.10 The computations of hourly wages and wage trends

For a comparison between the wages agreed in a CB and the national minimum wage, if any, the agreed wages need to be recalculated into hourly wages, based on the agreed working hours and the number of working days per year, cotrolled for paid annual leavve and for holidays. COBRA has an automatic feature that calculates the hourly wages. In addition, COBRA uses a timeline, which is for each CB specified by its start and expiration date. Based on this timeline, COBRA has an automatic feature that calculates an average annual wage for every year covered by the CB, including prior CB's. Hence, the trend of the agreed wages over time can be calculated.

3   Web pages generated from the CB DATABASE (per country/locale)

The CB DATABASE generates a number of web pages for the national WageIndictor websites, which are listed here.

1	FIND A CB	This page allows web-visitors to search for a specific CB, using the list of CB names.
2	CB - FULL TEXT	For each CB, the full text plus meta info plus coded text is shown on the webpage. There are as many pages as CB's, in the CB DATABASE. The content of these webpages is generated from the CB DATABASE.
3	CB - OVERVIEW TABLES	This page allows to compare the coded CB's in a country. For this comparison the web visitor can select CB's from the list of CB names, from the list of industries or from the list of nine topics. These selections result in a webpage showing a matrix table with coded CB information. The matrix tables are generated from the coded information in the CB DATABASE.
4	CB - TRENDS TABLES	This page allows to compare the CB's in a country over time. For this comparison the web visitor can select CB's from the list of CB names, from the list of industries or from the list of nine topics. These selections result in a webpage showing a matrix table with coded CB information. These matrix tables are generated from the coded information in the CB DATABASE. Note that this page will only be operative once enough CBs are entered into the CB DATABASE.

5	CB – RECENT CLAUSES	This page allows to compare the clauses of the most recent CB's in a country on a particular topic. For this comparison the web visitor can select CB's from the list of CB names, from the list of industries or from the list of nine topics. These selections result in a webpage showing a list of CB clauses. These clauses are generated from the highlighted text in the CB DATABASE.
6	CB – COMPARE CB WITH NATIONAL STANDARDS	This page allows to compare relevant information in the CB's, to the national labour law standards and the minimum wages. For this comparison the web visitor can select CB's from the list of CB names and from a list of items that can be compared, e.g. working hours, minimum wages, duration of maternity leave. These selections result in a webpage showing a matrix table. These matrix tables are generated from the coded information in the CB DATABASE and in the COUNTRY PROFILES DATABASE.
7	CB – LABOUR LAW ON COLLECTIVE BARGAINING	This page provides information about the national legislation concerning collective bargaining, if existing, to underpin the legal status of collective bargaining. This webpage consists of text generated from the COUNTRY PROFILES DATABASE.
8	CB – COLLECTIVE BARGAINING COVERAGE	This page provides information about the number of CB's in the country, about the number of workers covered, and the percentage of workers in the national labour force covered by collective bargaining. This webpage consists of a table that is generated from the COUNTRY PROFILES DATABASE and the CB DATABASE.
9	ABOUT WAGEINDICATOR CB COLLECTION	This page explains the reasons for the WageIndicator CB data collection and presents its team. It invites CB negotiators to submit their own CB's to the CB team.

4   COBRA dash board

4.1   The dash board

The dash board allows coders to chose what they want to do. Note: the coderss platform is password protected. On the dash board the following activities can be undertaken:
1)   CB DATABASE -> view, add & change
2)   COUNTRY PROFILES DATABASE -> view, add & change
3)   CODERS LOGBOOK -> view & add
4)   CODERS LOGFILE -> view
5)   DOWNLOADABLE PDF'S -> view
6)   AUXILARY LISTS -> view & add
7)   KEY WORDS LIST -> view & add

4.2   Countries and languages

COBRA is designed such that CB's from many countries and languages can be uloaded. This section details the related country and language issues. The following rules apply:
1)   The full text CB's are in their original language uploaded and posted on the webpages. Thus, the full text of a CB is not translated.
2)   Adding new countries or languages to the CB DATABASE needs to be communicated in the team, particularly with Paulien and Dani, because the initial webpages need to be made before CB's can be uploaded in the CB DATABASE.
3)   The CB key words list is available in a limited number of languages, currently English and French. Note that the key words are not country-specific, hence, the French list for Togo is similar to the one for Niger.

If new countries or languages are added, the key words list needs to be translated before uploading these CB's.

4) The COBRA dashboard is in English, and so is the coding scheme. For the time being, the dashboard, the coding scheme and this manual will be available only in English.

4.3   Coders Logbook

The CODERS LOGBOOK contains the coders' comments on their coding practices in case of ambiguity. The logbook facilitates communication between coders, such that all coders can take notice of all comments and apply the same practice. It also allows all team members to discuss the coding practices.

4.4   Coders Logfile

This file generates regularly a list of CB's, entered into the CB DATABASE, the stage of entry (Step 0, Step 1, Step 2), the date of coding and the name of the coder. It can be downloaded (or emailed) regularly by the coders, the Dar es Salaam team coordinator, Paulien, Dani, Kea, and others.

4.5   Country Profiles Database

The COUNTRY PROFILES DATABASE is not yet ready. The database will have information about regulations concerning collective bargaining and about national wages policies, working hours and vacations, if relevant. The information in the COUNTRY PROFILES DATABASE consists of text as well as coded information.

5   Entering a CB into the CB DATABASE

5.1   What can and cannot be entered into CB DATABASE?

The CB DATABASE allows to code:
1. Collective Bargaining Agreements for companies
2. Collective Bargaining Agreements for industries
3. Transnational Collective Bargaining Agreements
4. Framework Agreements

The following issues cannot be coded in CB DATABASE:
1. Proposal letters for CB negotiations
2. Agendas of collective bargaining committees
3. Pamphlets and a like

What format is needed for entering a CB into CB DATABASE:
1. Text files in MS Word, or any other text program; these are the basis for the full text webpages; note that files in PDF can be converted into text files but these need to be checked carefully, and the GIF files need to be retyped fully (only do so after consulting the project coordinator).
2. PDF files of the signed CB, these PDF files can be uploaded in the CB DATABASE, and they are posted as downloadable files on the CB webpage; whenever possible PDF files should be added, because the full text have no legal status, only the signed CB in PDF format has.

5.2   How to upload a CB in the CB DATABASE

Entering a CB text in the CB DATABASE is a 3 step procedure:
- STEP 0) Text is prepared in AMAIA;

- STEP 1) From AMAIA text is copied into the CB DATABASE and the meta data is coded (such as name, start and end-date, industry, country, language, signatories, and alike); after this step a web-page with full-text for that particular CB will be generated;
- STEP 2) the CB text is coded according to the coding scheme; after this step the coded information is added to the full text web-page and to the webpages for the CB - overview tables, CB - trends tables, CB – recent clauses, and CB – collective bargaining coverage

STEP 0), STEP 1), and STEP 2) not necessarily needs to be undertaken at the same time, though this is advised.

5.3   STEP 0: Preparing the CB text in AMAIA

When preparing the CB text for uploading, please follow these steps:
1) Does your computer have an HTML editor (for example Amaia) and the program ACROBAT READER X or higher? If not, please install these programs: LINK and LINK.
2) In case of a Word file, copy the text to NOTEPAD and save in order to upload.
3) In case of a PDF file, convert the pdf to text format
   a. Choose option "Save as" from the Files menu
   b. Chooser option "Text" from the Save as menu
   c. If this option is blocked by the creator of the file, copy paste the text manually to NOTEPAD
4) Save the stored .TXT file as an HTML file, using AMAIA
5) In AMAIA, assign headings H1, H2, H3 (max 3 heading levels); in most CB's, the structure is such that there are overall headings (to be defined as H1); Article numbers (to be defined as H2); and headings within articles (to be defined as H3). In case the text of a heading a long (more than 20 words) please select a limited set of words, and identify the remaining text in style 'normal'. The reason for assigning headings is that these headings are shown on the CB full text web page, to provide the web visitor with a good view on the CBA. Please do not use H4, because it makes the CB full text web page chaotic.
6) Check the text for presence of tables. If the original text included tables, please make an empty table in AMAIA, and copy each cell separately in the newly made table in AMAIA. Hence, the coder includes the tables manually

5.4   STEP 1: Uploading full text and coding the meta data

In this step, the full text is uploaded and the meta data is coded:
1) In COBRA, open the CB DATABASE
2) Identify the country of the CB, and check if the proposed currency is OK, otherwise click the relevant currency.
3) Upload the HTML file, prepared in STEP 0).
4) Respond to the questions concerning the CB name, industry, signatories and coverage of the CBA.
5) When applicable, attach PDF files, such as the CB signed by signatories, Appendixes, or other documents. Before attaching, please identify if the titles of the documents are appropriate. Use the words 'SIGNED <<cba name>>, 'APPENDIX <<cba name>>, and alike

5.5   STEP 2: Coding the full text
1) Respond topic by topic to the questions in the coding scheme. Once the tab button of a topic is ticked, the key words related to that topic highlight the matched words in the CB text. Navigate from one match to the next for answering the questions.
2) Note that the CB DATABASE checks the amounts of wages with respect to a minimum and maximum range for weekly/monthly wages to prevent typing errors. If you find these ranges not applicable to the CB at stake, please contact the CB project coordinator.
3) In case of a transnational CB, conduct the data entry of the CB for each country separately.
4) Comments are to be written in the language of the website, even when the language of the CB is different from the language of the website. Comments are shown as a footnote on the code in the code page.

6 The organisation of activities related to COBRA

To be written