

## THE CCNR PUBLISHES ITS THEMATIC REPORT / THE EUROPEAN INLAND NAVIGATION SECTOR LABOUR MARKET

Ref: CC/CP (21)01

The Central Commission for the Navigation of the Rhine (CCNR), in partnership with the European Commission, publishes annual and biannual reports dealing with the European inland navigation market. Thematic reports are now also published and cover certain aspects of the inland navigation market.

The monitoring of labour market indicators in a given sector is particularly relevant to assess the situation of human capital in this sector and its future development. Human capital is one of the most important resources and a fundamental precondition for a high-quality performance and economic growth of a sector. Given that no report providing detailed data on this topic at the level of the European inland navigation sector is currently available, it was decided to draft a thematic report with the objective of improving knowledge and information about the European inland navigation sector labour market.

The executive summary of the report may be found below. The full report (in English) can be downloaded in PDF format or viewed directly online at [www.inland-navigation-market.org](http://www.inland-navigation-market.org).

### EXECUTIVE SUMMARY

Based on quantitative data and qualitative information collected in the context of this report, the following main conclusions can be highlighted.

In inland waterway (IWW) passenger transport, employment increased in recent years, in particular due to the boom in river cruising. The growth in employment at the level of the whole EU was 26% between 2008 and 2018. Employment in IWW passenger transport reached 26,156 persons in 2018 and has overtaken IWW freight transport (23,520 in 2018) in terms of employment in the years 2015/2016.

This positive trend in IWW passenger transport employment is present in Rhine countries (e.g. Germany, Switzerland), Danube countries (e.g. Austria, Hungary, Romania) and also for Italy.

In IWW freight transport, the overall employment trend was rather negative in central and eastern Europe. This trend is demonstrated in the present report by means of available data for Austria, Croatia, the Czech Republic, Hungary and Slovakia. For Romania, the largest IWW Danube country, the employment trend was found to be more positive. For western European countries, the employment trend in freight transport has not been positive over the last ten years. However, whether it was really decreasing or rather at a constant level largely depends on the database being examined.

Evidence shows that one main explanation for the negative employment trend in IWW freight transport in central and eastern Europe could be due to an overly low wage level. According to official figures, the average monthly gross wage in the water transport sector in the Czech Republic was 872 Euro in 2017, thereby 16% lower than the average wage level in the Czech transport sector and 23% lower than the average wage level in the whole Czech economy. In the Hungarian IWT (Inland Waterways Transport) sector, the average monthly earnings for IWT workers amounted to 602 Euro, which was about 29% below the average wage level in the entire Hungarian economy. In Serbian IWT the wage of IWT workers was 616 Euro in 2019.

Compared to the wage level in western Europe, wages in eastern Europe are very low: the monthly gross median income for full-time IWW workers under the social security regime in Germany was 2,780 Euro in IWW freight transport in 2017 and 2,917 Euro in IWW passenger transport. Even if one takes into account the possibility that actual wages might be higher than the wages as stated in the official figures, it can be assumed that there is a significant wage gap between central and eastern Europe on the one hand, and western Europe on the other hand. This is confirmed by statistical data on the level of personnel costs per employee per country in the EU.

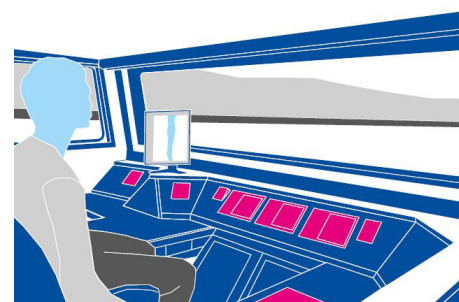
Statistical data suggest a rather high rate of migration of inland waterway workers from central and eastern Europe to western Europe. This type of migration tends to increase, for instance in Germany, a major country of destination especially for Czech, Polish and Romanian IWT workers. A similar observation can be made regarding Luxembourg, where a high number of IWT workers from the Czech Republic, Poland and Romania (but also from western European countries) work for companies established in Luxembourg. Serbs and Hungarians are often employed in the Austrian and the German IWT sectors.

Another phenomenon of the IWT labour market is the ageing process. Detailed long run data for Belgium show that ageing is particularly a problem within the group of self-employed barge owner-operators, although also within the group of employees. This higher degree of ageing amongst the self-employed begs additional explanations, which were found during expert interviews amongst banks. They point to a combination of social, economic and cultural influencing factors.

In particular, living on a vessel comes with specific challenges and it can be observed that many young people favour land-based jobs with regular working hours and weekends at home.

### THEMATIC REPORT THE EUROPEAN INLAND NAVIGATION SECTOR LABOUR MARKET

PUBLISHED IN  
**FEBRUARY 2021**



### ABOUT THE CCNR

*The Central Commission for the Navigation of the Rhine (CCNR) is an international organisation that exercises an essential regulatory role in the navigation of the Rhine. It is active in the technical, legal, economic and environmental fields. In all its areas of action, its work is guided by the efficiency of transport on the Rhine, safety, social considerations, and respect for the environment. Many of the CCNR's activities now reach beyond the Rhine and are directly concerned with European navigable waterways more generally. The CCNR works closely with the European Commission as well as with the other river commissions and international organisations.*



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This factor is highly relevant, for example in western Europe, where around 80% of IWW freight companies are independent owner-operators, whose working hours cannot be restricted to a regular schedule.

Altogether, the factors described above lead to a certain shortage of labour in inland navigation, a concern for both the passenger and freight inland navigation market, which can in particular be observed for qualified personnel at management level and qualified boatmasters in the liquid cargo segment.

Other factors contributing to this observed shortage of staff are of a technical nature. As the work required from crew members is becoming more and more technical, inland navigation companies often seek even more specialised profiles than before, and these are difficult to find.

The overall economic framework conditions in different market segments of IWT are also influencing factors. The inland navigation passenger transport market, in particular its river cruise segment, has been following a positive trend over the last years. Passenger numbers in river cruising in the EU increased by 10% in 2019 compared to 2018, and between 2012 and 2019 figures more than doubled, reaching 1.8 million passengers in 2019.<sup>1</sup> In freight transport, the development is less positive overall, with a decrease of total IWW goods transport performance in the EU of 7% from 2014 to 2019.<sup>2</sup> Already now, these differences in economic development of market segments are reflected in the employment figures.

In light of the above, ways to strengthen the attractiveness of the sector must therefore continue to be a priority. More fundamental measures with an effect on all these factors (may they be socio-cultural, economic or financial) should be taken into account in order to increase the attractiveness of the IWW labour market, in particular for the younger

generations. Several options were outlined during interviews with banks engaged in IWT financing. For instance, the reorganisation of the logistical supply chain, with more backward and forward vertical integration as a way of strengthening the position of IWT within the whole supply chain and to increase its bargaining and economic power. The development of cooperatives was also seen as an important option to better align economic necessities (efficiency, profitability, high workload) with social and cultural aspects (private and social life, family, etc.) of inland navigation workers. And finally, the continued promotion of the range of possible job opportunities in the sector, both on board and ashore, is also essential.

### **ABOUT THE MARKET OBSERVATION AND MARKET INSIGHT**

The Market Observation and Market Insight reports are respectively annual and biannual publications by the CCNR dealing with the European inland navigation market. The CCNR also publishes a thematic report once a year, the theme of which is defined in consultation with the European Commission. These analyses of the economic situation, which are free of charge, aim to assist strategic decision making in this sector in Europe, by both the profession and firms as well as in terms of transport policy and within administrative authorities. The gathering and analysis of this data by the CCNR has been co-financed by the European Commission since 2005. This fruitful collaboration has enabled the CCNR to extend this activity, which historically it has been carrying on for almost two centuries, beyond the Rhine region to cover all Europe's navigable waterways.

**We wish you an enjoyable read!**



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<sup>1</sup> See: *Inland navigation in Europe, Market observation, annual report 2020*: [https://inland-navigation-market.org/wp-content/uploads/2020/09/CCNR\\_annual\\_report\\_EN\\_2020\\_BD.pdf](https://inland-navigation-market.org/wp-content/uploads/2020/09/CCNR_annual_report_EN_2020_BD.pdf), page 134

<sup>2</sup> Eurostat [iww\_go\_atygo]