


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

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

 The new thematic report “The labour market of the European inland navigation sector” can be downloaded in [PDF format \(in English\)](#) or viewed online at [www.inland-navigation-market.org](http://www.inland-navigation-market.org).

We wish you an enjoyable read!

### EXECUTIVE SUMMARY

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.

When investigating all possible sources (statistical offices, employment administration, social security organisations, waterway administrations, ministries of transport and of labour, etc.), detailed data about employment and labour market conditions in inland waterway transport were identified. However, given that several sources of data sometimes exist for one

and the same country, data might be more or less different for the same country depending on the source used. This is mainly due to the different methodologies used by different organisations. Whenever possible, an explanation has been given in the report as to the type of source chosen and the reasons for choosing one source over another.

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

According to the Eurostat SBS, the total number of persons employed in the transport of goods and passengers on inland waterways in Europe amounted to approximately 41,923 in 2020, of whom around 56% are in freight transport and the other 44% in passenger transport. This figure is not available for 2021.

From 2011 to 2018, the number of persons employed in the passenger transport sector in Europe has continuously increased, as a result of several factors, including the increase in the number of cruise vessels in the European inland waterways transport (IWT) market and the increase in demand for river cruises. However, in 2019 and 2020 almost all European countries registered a substantial decrease in workers, more marked in 2020. The outbreak of the global health crisis and the consequent containment measures established by the European Union and Member States' governments severely affected the transport of passengers. In terms of the labour force employed in the inland passenger transport sector, Germany is the leading country. The Netherlands, Switzerland and Italy also show high proportions of employment in the sector. Figures for the labour force in 2021 increased overall and per country compared

### 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.

### 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 thematic reports, 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.



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to 2020, mirroring the progressive recovery of inland waterway passenger transport after the Covid-19 crisis. In the Netherlands, the number of employed persons slightly decreased between 2020 and 2021.

In inland waterways freight transport, the Netherlands is the leading country in terms of employed persons, followed by Germany, France, and Romania. There was a stable trend between 2008 and 2021. Unlike the passenger transport sector, the number of employed persons does not show substantial decreases in 2020. This indicates that the slowdown or the closure of the economic activities in the crucial months of the pandemic did not severely affect the employment of inland navigation freight transport.

The majority of IWT companies in Europe are registered in the Netherlands, followed by Germany and France, which also have a high share. On average, the Netherlands has a market structure composed mainly of small companies with an average of about three workers per company, compared to Germany which has a higher number of larger companies. Concerning both passenger and freight transport, a tendency towards more consolidation is reported by banks.

Overall, the number of passenger transport companies shows an increasing trend between 2012 and 2015, after which the number stabilised until 2020, when a slight decrease is registered. The year 2021 showed a clear increase in the number of companies.

Concerning inland navigation freight transport, a decreasing trend in the number of companies is observed between 2014 and 2021.

Several phenomena have affected the labour market in the inland waterway transport sector. The most noticeable are migration, the ageing process, staff shortage, climate conditions (water levels), and the macroeconomic and financial conditions. According to the Danube Commission, differences in salaries compared with the maritime sector is also a labour market influencing factor in the Danube region. Due to higher salaries in the maritime sector, a greater number of job starters/seekers decide to choose this sector when starting their training.

In terms of regional distribution in Europe in regard to the degree of employment, the overall trend was rather negative in eastern

Europe in the inland waterway freight transport sector. Potentially, one of the main reasons is the lower wage level. Compared to western Europe, wages in eastern Europe are very low. The statistical data suggest a high rate of migration of inland waterway workers from eastern Europe to western Europe. Germany is the major country of destination, in particular for Czech, Polish and Romanian IWT workers. Luxembourg welcomes a high number of IWT workers from the Czech Republic, Poland and Romania. Both Austria and Germany employ many Serbs and Hungarians.

Another phenomenon of the IWT labour market is the ageing process which somehow is correlated with the staff shortage phenomenon. Detailed long-run data for Belgium show that ageing is particularly a problem within the group of self-employed barge owner-operators. Based on information provided by interviews, it can be assumed that many young people favour land-based jobs with regular working hours and weekends at home. This factor is highly relevant, for example in western Europe, where around 80% of inland waterways freight companies are independent owner-operators, whose working hours often cannot be predicted in conformity with a regular schedule.

The factor described above leads to a certain shortage of labour in the sector both for passenger and freight inland navigation markets, which can be observed for qualified personnel at management level (boatmasters), which is even more pronounced in the liquid cargo segment. Other factors contributing to 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 more specialised profiles than before, which are also difficult to find.

In terms of economic phenomena, the macro-economic context of the previous years has been severely affected by three main crises. In 2020, the Covid-19 pandemic and its consequences weighted heavily on many economic sectors. The slowdown in global production and international trade together with the restrictions on domestic and international mobility provoked a decline in both passenger and freight transport demands. Additionally, the Russian war of aggression against Ukraine caused the disruption of the supply of goods imported from Russia and Ukraine, and also led to a decrease in IWT cargo transport on the Rhine and the Danube for several goods segments.

Finally, the low water periods observed in 2018 and 2022 severely affected transport volumes and freight rates. In addition to a number of other IWT factors, the overall decrease in the freight inland navigation labour market can also be explained by the financial crisis, which had a negative impact on the volumes of goods transported and therefore on the demand for nautical personnel in the cargo sector.



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